Oracle Fusion Cloud Customer Experience

Understanding Import and Export Management for Sales and Fusion Service

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1 About This Guide

Audience and Scope

If you import and export business data in CX Sales and Fusion Service, then this guide is for you.

> **Note:** Oracle has discontinued the File-Based Data Import and Export support for CX Sales and Fusion Service Objects with the 20D Update. We strongly recommend that you move to the new Import and Export Management application (available from Navigator > Tools > Import Management/Export Management) to continue importing and exporting your data. As you migrate to the new framework, make sure you upgrade both manual processes and automated or scheduled processes. Note that data maps aren't portable between frameworks and must be recreated as a one-time activity.

Before getting started, make sure your company's CX Sales and Fusion Service is up and running at a basic level. You can find these details in the use case contained in the Getting Started with Your Sales Implementation guide.

To set up and work with the additional features of CX Sales and Fusion Service, see CX Sales and Fusion Service documentation on Oracle Help Center at https://docs.oracle.com.

Related Guides

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

Title	Description
Oracle Applications Cloud Configuring Applications Using Application Composer	Provides information on how sales administrators and implementors can make application changes using the available configuration toolset.
Getting Started with Your Sales Implementation	Provides you with the concepts and procedures you need to implement a sales automation solution.
Implementing Customer Data Management for CX Sales and Fusion Service	Provides conceptual information and procedures needed to implement customer data management-specific components and features of your application.
Implementation Reference	Provides conceptual information and procedures used to implement sales application components and features.
Using Sales	Provides information about performing day-to-day tasks in your sales applications.. If you're a sales person, sales manager, or any other sales user, then this guide is for you.

Title	Description
Using Customer Data Management for CX Sales and B2B Service	Provides information about managing customer information and customer data quality. If you're an end user of the customer data management functionality such as customer data steward and data steward manager, then this guide is for you.

Related Topics

- Oracle Help Center

2 Overview of Import Management

About Import Management Documentation

This topic provides an overview of the types of help available for importing data into Oracle Applications Cloud using Import Management.

You can get the information about import from the following:

- Sales and Fusion Service documentation on the Cloud Help Center (https://docs.oracle.com/en/cloud/saas/index.html).
  - Explore the latest critical reference content supporting Sales and Fusion Service.
  - Download PDF versions of guides, find links to reference materials and white papers, and search for specific topics.
  - Browse import data topics on the Administer tab that provide key import information.
- Understanding Import and Export Management for Sales and Fusion Service guide available on the Help Center (http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=FAIEM)

  To understand what attributes are available for import for each object, start by searching help using the keywords Import Your <Object Name> Data. For example, to get help on importing accounts, enter Import Your Account Data.

What are the available data import options?

You can import your data from an external application into Oracle Applications Cloud in several different ways, including using public web services.

Which import method you use depends on the type of data you're importing, the volume of data, and technical requirements. If you're integrating one cloud service with other cloud services, then you must use additional import methods as described in the appropriate guides.

When you're importing data for a particular object, you must make sure that any prerequisite objects already exist in the application. For example, if you're importing contacts for an account, then the account must already exist in the application. If one import job depends on the contents of another import job, then complete the prerequisite job before starting the dependent job. For example, if you're importing both accounts and opportunities, then import accounts before importing opportunities.

The following table lists the import methods and references to further information.

Import Method	Description	When to Use	How to Access	For More Information
Quick Import Excel Macros	You can use the import macros to speed up and simplify the import of up	These are best to import data in your initial deployment.	You can download the Excel macros and any required mapping files from the	The chapters in the Getting Started with Your Sales Implementation

Import Method	Description	When to Use	How to Access	For More Information
	to 5000 records at a time for some objects. They validate your data entries, provide list of values, and automatically populate constant values. The macros create data files that are automatically imported using Import Management. You can import the following objects using import macros: • Sales Users • Products and product groups • Accounts • Contacts • Account Hierarchy • Leads • Opportunities	The macros are targeted to the simple proof of concept sales automation use case covered in the Importing Sales Users chapter of the Getting Started with Your Sales Implementation guide. For example, the import macros assume that you're importing account, contact, and lead records for one country at a time. The macros generate log files with information about the File Import job, and these log files can also serve as a learning tool for more complex import.	Getting Started with Your Implementation: Quick Import Macros (Document ID 2229503.1) article on My Oracle Support.	guide provide detailed instructions and video tutorials for using the macros. For instructions on how to add your own fields to the macros, see. How to Configure Quick Import Macro for importing Employee Resources (Doc ID 2364229.1) article on My Oracle Support.
Import Management	Import Management improves definition, error handling, and performance for importing flat files (.CSV). For example, Import Management has drag and drop mapping capabilities and validates the first ten records in your data file before you import to ensure the data meets the import constraints of the various attributes. Import Management is available for importing data for the following application objects and their child objects: • Access Groups • Account • Action • Action Plan • Activity • Address • Asset • Attachment	Use Import Management for importing outside the scope of the Getting Started with Your Implementation guide.	Click **Import Management** in the Navigator.	See the Understanding Import and Export Management guide for instructions on using the import.

Import Method	Description	When to Use	How to Access	For More Information
	• Business Plan • Campaign • Case • Classification • Classification Code • Competitor • Consumer • Contact • Contract • Contests • Country Structure • Deal Registration • Hierarchy • Hierarchy Member • Household • Hub Source System Reference • Incentive Rule Assignments • Incentive Rule Attribute Values • Incentive Rules • Incentive Transaction • Interaction • MDF Budget • MDF Claim • MDF Request • Note • Objective • Opportunity • Organization • Partner • Partner Program • Person • Price Book Header • Product • Product Group • Program Enrollment • Promotion • Queue			

Import Method	Description	When to Use	How to Access	For More Information
	• Relationship • Resource • Resource Capacity • Sales Lead • Sales Order • Sales Territory • Sales Territory Quota • Self-Service Role • Service Request • Standard Text • Standard Text Folder • Standard Text User Variable • Subscription • Template • Template Action • Territory Geographies • Any additional objects you create			
External Data Loader Client	Command-line tool that's used to import high-volume flat source data files into CX Sales and Fusion Service. This tool splits a large data file into multiple smaller files to adhere to import volume limits, and enables the tracking of import status. The client supports the same objects as Import Management.	Use this import method for importing very large data files for the objects supported by Import Management.	You can download the client from Oracle Support Document 2325249.1 (External Data Loader Client) on My Oracle Support.	Instructions for using the client are available in the document and in the client itself. The chapter Import Data Using External Data Loader Client in the guide Understanding Import and Export Management for CX Sales and Fusion Service provides information about using the External Data Loader Client.
Web Services	Web services are available for external client applications to start and monitor import jobs. You can manage Import Management jobs using REST web services, and File Import jobs using SOAP web services.	Use web services to manage import jobs to import directly from an external application.	Public APIs are available for both the Import Management/REST services and the File Import/SOAP services. The following REST APIs are available for import: • Import Activities • Import Activity Maps • Import Export Objects Metadata	For REST API documentation, see the REST API for CX Sales and Fusion Service guide. For SOAP API documentation, see the SOAP Web Services for CX Sales and Fusion Service guide.

Import Method	Description	When to Use	How to Access	For More Information
			The SOAP service is called the File Import Activity Service.	
High-Volume Import	The high-volume import mode is designed to import millions of records at once. This mode doesn't trigger any custom logic configured through the application composer. This option is available for the following objects and their child objects: • Account • Address • Asset • Classification Code • Contact • Contract • Contract Line • Country Structure • Custom Object (custom top level objects and custom child objects) • Geography • Hierarchy • Hierarchy Member • Household • Hub Source System Reference • Incentive Transaction • Organization • Person • Sales Territory Quota • Territory Geographies	Use this import mode for importing very large number of records for the objects supported.	You can access High-Volume Import either using REST services or using External Data Loader Client. When importing using REST, set the "High-volume" attribute to enable this mode of import. When importing using the External Data Loader Client, set the command-line parameter "-high-volume" to enable this mode of import.	For REST API documentation, see the REST API for CX Sales and Fusion Service guide. The chapter Import Data Using External Data Loader Client in the guide Understanding Import and Export Management for CX Sales and Fusion Service provides information about using the External Data Loader Client.

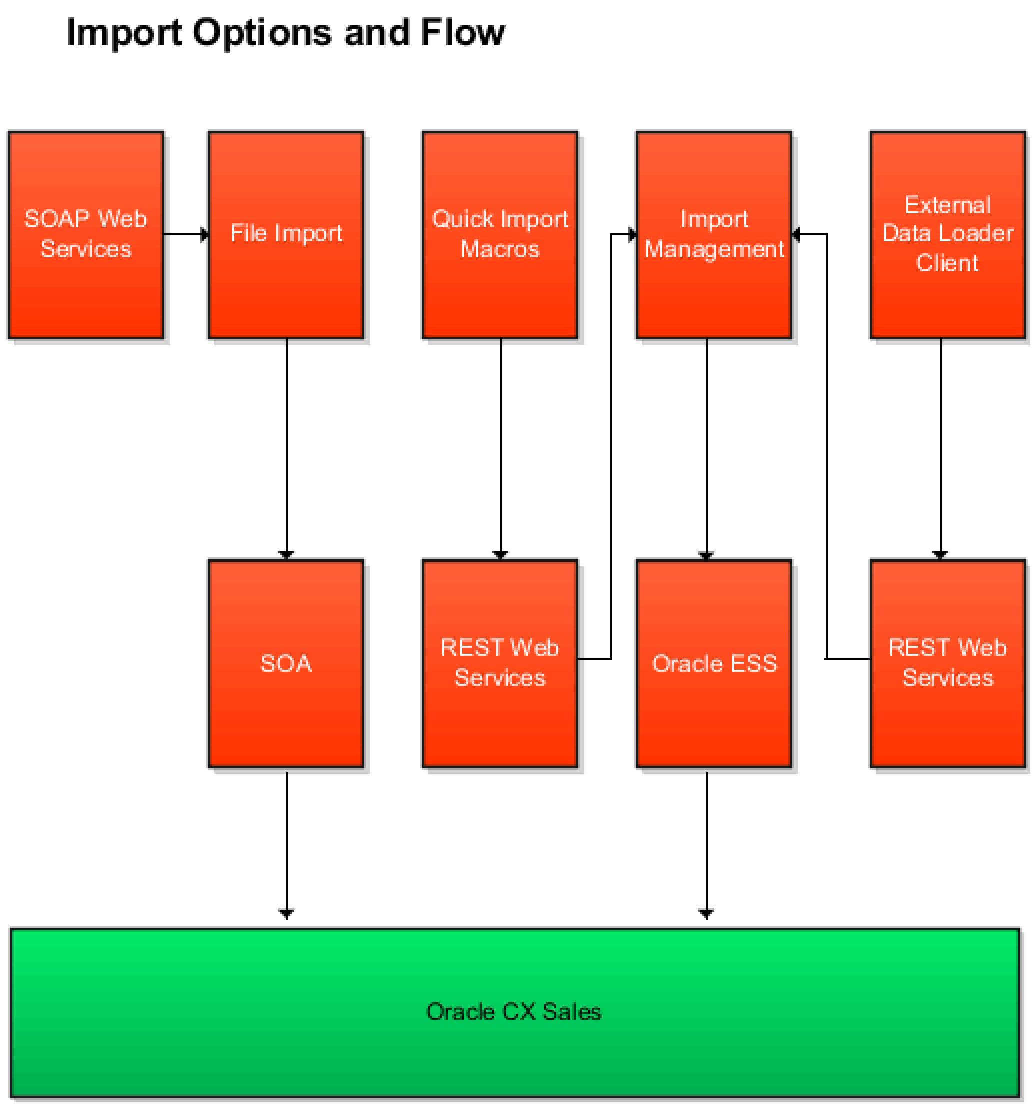
Note: Object work flows can't be invoked using Import Management.

The following figure provides an architectural overview of the different import methods:

- File Import uses the SOA architecture to import data into Oracle CX Sales.
- Quick Import uses the REST Web services to import data into Oracle CX Sales. When you import data using the quick import Excel macros, you're creating an import activity in Import Management using the REST web

services. The macro import creates the same import activity and uses the same mapping as you do when you initiate the import from the application. You can monitor each import in the macro or in the application itself.

- Both Import Management and the External Data Loader Client use the same scheduled processes for import. When you import very large files using the client, the REST APIs create multiple processes to respect the Import Management file size limit.
- To import from an external application, use the SOAP and REST web services directly.



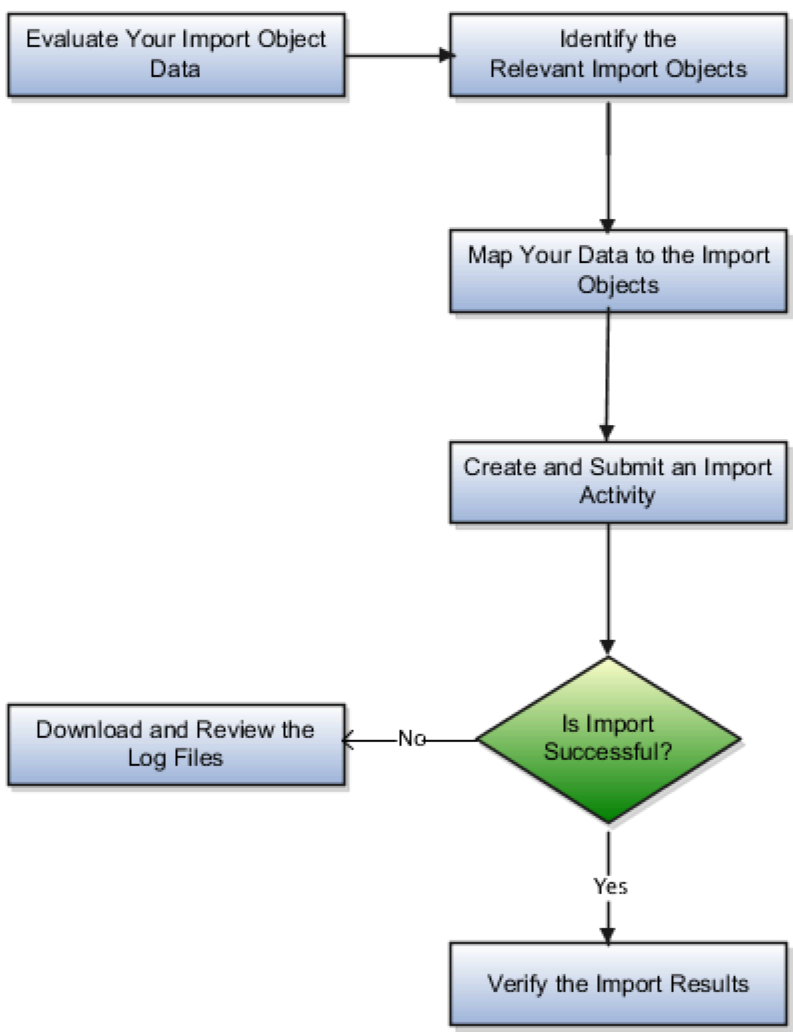
Related Topics

Overview of Import Process

This topic provides an overview of the components used to import data.

Import Process Flow

The following figure explains the various stages in the import process:



1. Evaluate your import data.
2. Identify the relevant import objects.

3. Map your data to the import objects.
4. Create an import activity.
5. Verify the import results.

Import Objects and Import Queue

You can find details about the attributes such as data type, length, and user key information for each object on the **Import Objects** tab. You can download the template for each import object by clicking the Download icon. You can create a mapping either while creating an import or separately using the **Import Objects** tab. On the **Import Object Details** page, click the Display Name link for the object to navigate to the **Manage Mapping page**. On this page, you can create a new import mapping, upload a map, or manage an existing mapping.

The Import Queue tab lets you view the imports that are in various statuses, such as active, completed, or unsuccessful. You can further drill down into an import activity by clicking the import name link to view the status details.

Application Composer and Custom Extensions

If you create additional attributes to an existing object or create custom objects in Application Composer, then these extensions are available for import and export once you publish your sandbox.

Related Topics

- Define Objects

What are the file-size limits for import?

You can import a maximum of 50,000 records per data file. This limit is applicable for files imported using the User Interface and the REST service (low-volume). The size of the data file can't exceed 250 MB.

You can submit multiple jobs at one time. The application dynamically calculates the number of jobs that will run parallelly at a time. All other jobs are queued and executed as and when the previous jobs complete.

> **Note:** If you're using the importActivities REST service to submit jobs (also known as 'import activities'), then each job can contain up to 20 CSV files in the request payload. This means that 10 jobs, each with 20 CSV files of 50,000 records, can instruct the application to process up to one million records at a time.

To import much higher volumes of data, you must use the External Data Loader Client (`EDLC`). `EDLC` accepts files with more than 50,000 records. It breaks these larger files into smaller pieces of 50,000 each and imports them. Using the high-volume mode of EDLC, you can split and import in pieces of 500,000 records each.

Here are the file and record limits for Import Management:

Import Channel and Mode	Maximum Number of Files per job Submission	Maximum Records Processed in a Single Submission
User Interface (low-volume)	1 file (50k records)	50k records
REST Service (low-volume)	50k records per file	Unlimited (Must be manually split by the user into 50k record files)

Import Channel and Mode	Maximum Number of Files per job Submission	Maximum Records Processed in a Single Submission
EDLC (low-volume)	50k records per file	Unlimited (`EDLC` splits into 50k record files by default, and submits in a single REST call.)
User Interface (high-volume)	1 file (500k records)	Unlimited (Must be manually split by the user into 500k record files)
REST Service (high-volume)	500k records per file	Unlimited (Must be manually split by the user into 500k record files)
EDLC (high-volume)	500k records per file	Unlimited (`EDLC` splits into 200k record files by default, and submits in a single REST call.)

Note: Oracle recommends that you use EDLC (high-volume) import for the supported objects and that you limit the job to 2 million records with 20 files per job (around 100k records per CSV file). If you plan to run parallel import batches, Oracle recommends that you run a maximum of 10 parallel batches. User performance will vary based on your data and configuration. The recommendation of 10 parallel batches of 100 K records is a tip to get you started. You need to explore and identify the configuration that best suits your organization's requirements.

Note: Ensure that purge and imports aren't running in parallel for the same object at the same time.

Note: Split the data into multiple files if the import with large number of fields or 50k records fails.

Note: Order the records to have better performance. Keep all the child levels belonging to the same parent in the same file. Such as keep all the Subscription cover levels belonging to the same parent "Subscription Product " in the same file.

How You Use Alternate Keys to Import Records

Alternate keys help you uniquely identify object records, so that you can create, update, delete, and manage relationships. This helps you import and build relationships to other objects, without the need to know the system-generated primary keys of each record.

Use of known alternate keys also eliminates the need to requery and remap data.

Here are some examples of Alternate Keys:

- Public Unique Identifier (`PUID`) - supports the ability to define an auto-generated sequence number.
- Original System/Original System Reference (OS/OSR) - consists of two fields:
  - Original System - refers to the source system from which the record was sourced. Administrator must configure this field.

- Original System Reference - refers to the unique identifier for the record in the source system.

- Email Address - the email address value of a record can be used on some objects (such as Employee Resource) to identify a record.

The keys resolve in the following order of precedence:

1. Primary Key (PK)
2. Public Unique Identifier (`PUID`)
3. OS/OSR (if applicable)
4. Any other alternate keys (`PUID` must be the first alternate key in the order of precedence if more than one alternate key is supported)

Here is the use case supported in Import Management, high-volume import mode, and External Data Loader Client:

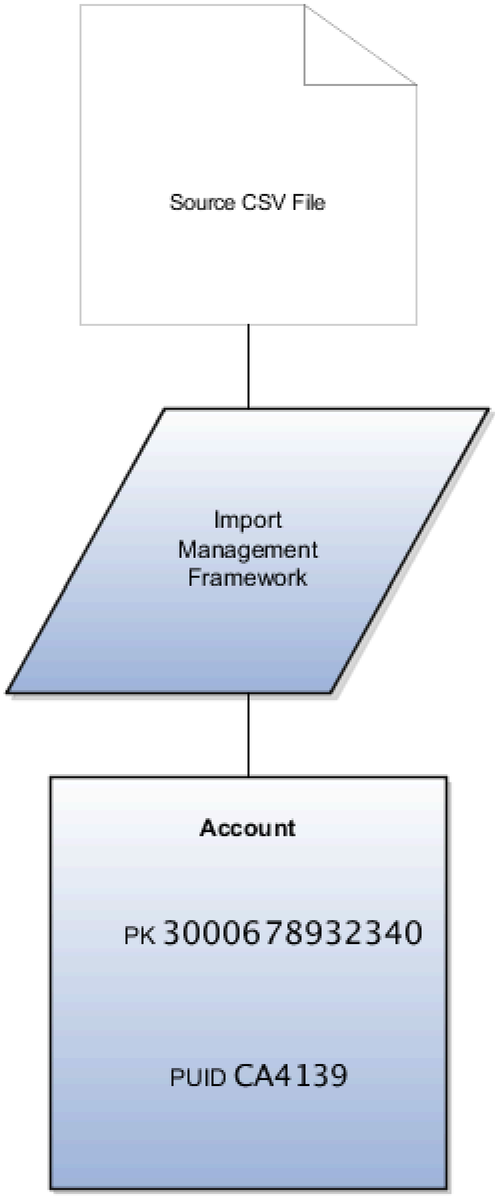
What You're Trying to do	How to do it
Update a value on a record	• Refer to the record using object-specific Primary Key(s) or using object specific PUID(s). For example, `LeadId`(PK) and `ResourceId`(PK) or `LeadNumber(PUID) and PartyNumber (PUID)` • Refer to the record only by one of its defined AK values • Refer to the record only by one of its defined OS/OSR values

When performing updates using Import Management, if you have multiple rows in the source CSV file, each using the same PK or PUID values, then the records in your source file may not be processed in the order in which they're listed.

Scenarios for Creating, Updating, and Deleting Records

Scenario A shows the different ways of creating, updating, and deleting records using different combinations of keys with account object as an example. The following image and tables highlight the use cases for this scenario:

Scenario A for alternate key import



Column	Meaning
PartyId	Primary key. Value comes from system-generated document sequence number. Never null.
PartyNumber	PUID. When record is created value is either passed in or system-generated. Never null.
SourceSystem	Source system name. Can be null. (Only a limited number of objects support OS/OSR construct)
SourceSystemReferenceValue	Source system reference. Can be null. (Only a limited number of objects support OS/OSR construct)

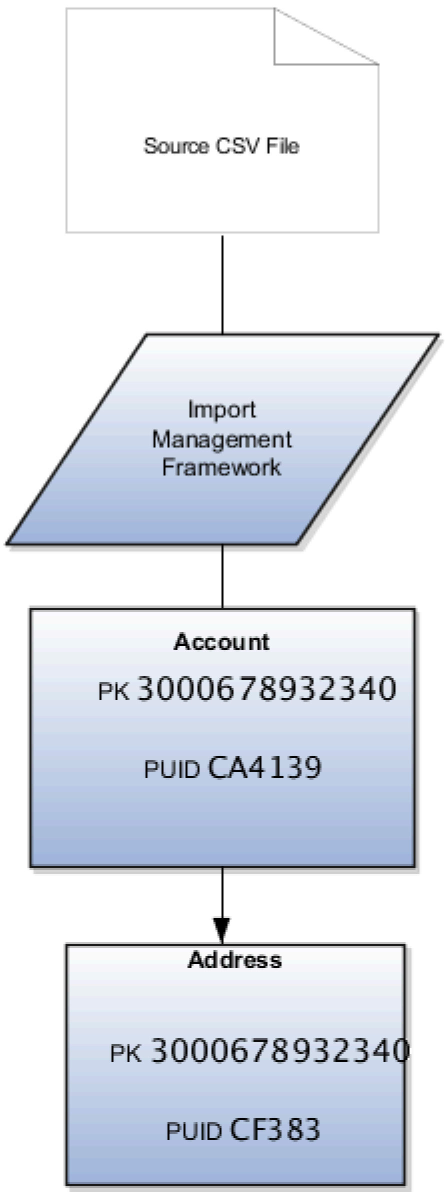
Column	Meaning
CEOName	This is a non-key data attribute on the object. Can be null.

Use Case	Source file contents	Description	PK	PUID	OS	OSR	Non-key Data
Create a record, pass in PUID on primary object	PartyNumber: CA4139 CEOName: John Smyth	A record created	98769 (system-generated)	CA4139	N/A	N/A	John Smyth
Create a record, without passing PUID value on primary object	CEOName: John Smyth	A record created	98770 (system-generated)	CA4140 (system-generated)	N/A	N/A	John Smyth
Create a record, pass in OS/OSR on primary object	SourceSystem: Siebel CRM SourceSystemRef 3-0007 CEOName: John Smyth	A record created	98771 (system-generated)	CF380A (system-generated)	Siebel CRM	3-0007	John Smyth
Update data attribute on existing record, using PK to identify the record	PartyId : 98769 CEOName: Soloman	Record updated	98769	N/A	N/A	N/A	Soloman
Update data attribute on existing record, using OS/OSR to identify the record	SourceSystem: Siebel CRM SourceSystemRef 3-0007 CEOName: Soloman	Record updated	98771	N/A	Siebel CRM	3-0007	Soloman
Delete existing record, using PK to identify the record	PartyId : 98769	Record deleted	98769	N/A	N/A	N/A	N/A
Delete existing record, using PUID to identify the record	PartyNumber : CA4140	Record deleted	98770	CA4140	N/A	N/A	N/A

Use Case	Source file contents	Description	PK	PUID	OS	OSR	Non-key Data
Delete existing record, using OS/OSR to identify the record	SourceSystem: Siebel CRM SourceSystemRef: 3-0007	Record deleted	98771	N/A	Siebel CRM	3-0007	N/A

Scenario B shows the different ways of creating child records, updating and deleting relationship to the parent record. Here account is the parent and address is the child object. The following image and tables highlight the use cases for this scenario:

Scenario B for alternate key import



Column	Meaning
PartyId	Primary key. Value comes from system-generated document sequence number. Never null.
PartyNumber	PUID. When record is created value is either passed in or system-generated. Never null.
SourceSystem	Source system name. Can be null.
SourceSystemReferenceValue	Source system reference identifier. Can be null.
CEOName	This is a non-key data attribute on the object. Can be null.
PartyId	Foreign key to the parent record. This value contains the PK of the record in the parent object.
PartyNumber	Foreign key to the parent record. This value contains the PUID of the record in the parent object.
AddressNumber	This value contains the PUID of the record in the child object.
PartySourceSystem	Source system value of the parent object.
PartySourceSystemReferenceValue	Source system reference value of the parent object.

Use Case	Source file contents	Descriptio	PK	PUID	Parent PUID	Parent OS	Parent OSR	OS	OSR	Non-key Data	Foreign Key
Create a child record, pass in custom PUID and parent object PK value	PartyNumb CA2700 CEOName: Rhode PartyId: 98770	A child record is created, relationshi to parent is establishec through PK	5001 (system-generated)	CA2700	N/A	N/A	N/A	N/A	N/A	Rhode	98770
Create a child record, pass in parent object PUID value	CEOName: Rhode PartyNumb CA2700	A child record is created, relationshi to parent is establishec through PUID	5002 (system-generated)	system-generated	CA2700	N/A	N/A	N/A	N/A	Rhode	N/A
Update the relationshi to point to	PartyNumb CA2700	Existing child record updated	5001	CA2700	N/A	N/A	N/A	N/A	N/A	Rhode	98772

Use Case	Source file contents	Descriptio	PK	PUID	Parent PUID	Parent OS	Parent OSR	OS	OSR	Non-key Data	Foreign Key
a different parent, using the PUID of the child as the key	AddressNu CF383	relationshi to a new parent establishec through PUID									
Delete the relationshi to the parent	PartyId: 5002	ERROR - child record should not exist stand alone. Must have relationshi to a parent. (Address object is an exception to this.)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Create a child record, pass in parent object OS/OSR value	PartySourc Siebel CRM PartySourc 3-0001 SourceSyst Siebel CRM SourceSyst 3-9001	A child record is created, relationshi to parent is establishec through OS/OSR	system-generated	CA2701	N/A	Siebel CRM	3-0001	Siebel CRM	3-9001	N/A	N/A
Create a child record, pass in parent object PUID value	PartyNumb CDRM-20C	A child record is created, relationshi to parent is establishec through Parent PUID	system-generated	CA2702	CDRM-20C	N/A	N/A	Siebel CRM	3-9002	N/A	N/A
Create a child record, pass in parent object foreign key value	PartyId: 1234	A child record is created, relationshi to parent is establishec through foreign key	system-generated	CA2703	N/A	N/A	N/A	Siebel CRM	3-9003	N/A	1234

Use Case	Source file contents	Descriptio	PK	PUID	Parent PUID	Parent OS	Parent OSR	OS	OSR	Non-key Data	Foreign Key
Delete child record using PUID to identify the record	AddressNu CDRM-90C	Delete a child record using the PUID of the record	N/A	CDRM-90C	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Delete child record using OS/ OSR to identify the record	SourceSyst Siebel CRM SourceSyst 3-0007	Delete a child record using OS and OSR	N/A	N/A	N/A	N/A	N/A	Siebel CRM	3-0007	N/A	N/A
Delete child record using primary key	AddressId: 9898989	Delete a child record using primary key	9898989	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Import Management and Access Groups

If you're using access groups to manage your users access to data, and if you want to import business data into your Sales and Service applications, review the information in this topic.

When you use the Import Management functionality to import data for business objects that have child objects, for example, opportunities or accounts, you have to import the CSV file for the parent object first so that the parent records exist before you import the child object records. If you're using access groups for data access, once the parent object is successfully imported, you must also run the Perform Object Sharing Rules Assignment process to make sure the parent records are correctly assigned and available. Then you can import the child object records.

If you were provisioned with the sales application for the first time in Update 22B or later, system access groups and object sharing rules are used to manage your users access to data by default. So you must always run the Perform Object Sharing Rules Assignment process before you import child object records for parent object records.

See *Run the Perform Object Sharing Rule Assignment process*.

Overview of Oracle WebCenter Content Document Transfer Utility

The WebCenter Content Document Transfer Utility is a set of command line interface tools that provide capabilities to import and export content from a local system to the Oracle WebCenter Content Server.

The tool has the following components:

- The DownloadTool is used to retrieve a content item from Oracle WebCenter Content Server and save its contents to a local file.
- The UploadTool is used to create a new content item in Oracle WebCenter Content Server based on contents streamed from a local file.
- The SearchTool is used to locate content items within Oracle WebCenter Content Server matching specific query criteria.
- The StorageTool is used for migrating applicable Oracle WebCenter Content Server documents from the server's file system to secure file storage within the Oracle Database.

You can find the details of using each tool, along with sample commands, in the Readme html file downloaded as part of the tool.

Variants of the Utility

Two forms of the transfer utilities exist:

- The transfer utility based on Remote Intradoc Client (RIDC), (oracle.ucm.fa_client) which is a feature-set Java library that encapsulates Oracle WebCenter Content RIDC and uses standard HTTPS to communicate with the Oracle WebCenter Content server. Tools belonging to the RIDC-based transfer utility begin with the package oracle.ucm.client, such as oracle.ucm.client.UploadTool. This utility has no additional library dependencies. The feature-set Java library that bundles the RIDC-based transfer utility repackages the RIDC classes and leverages the HTTP client provided by the `Java Virtual Machine` (`JVM`).
- The generic soap-based transfer utility (oracle.ucm.fa_genericclient) which requires the Java Required Files (JRF) web service supporting libraries and uses Java API for XML Web Services (JAX/WS) over HTTPS to communicate with the Oracle WebCenter Content server. Tools belonging to the generic soap-based transfer utility begin with the package oracle.ucm.idcws.client, such as oracle.ucm.idcws.client.UploadTool. This utility has dependencies on the JRF JAX/WS web service client stack and Oracle Web Services Manager (`WSM`). The stack in turn also looks for Middleware Platform Security and Audit Framework configuration files and libraries, and logs warnings if these are unavailable.

Downloading the Tool

You can download the Oracle WebCenter Content Document Transfer Utility by navigating to the My Oracle Support (support.oracle.com) document Oracle WebCenter Content Document Transfer Utility Readme (document ID 1624063.1). Once downloaded, you can run the tool by navigating to the ridc folder after extraction.

Command Documentation

Documentation for the tools is contained in the root directory of the tool download ZIP in a file named "WebCenter Content Document Transfer Utility Readme.html". This documentation describes various program options available, along with requirements such as Java version and supporting libraries required. A change log is included as well.

3 Get Started with Import

How do I import data?

Use Import Management from the Tools work area, to import data from text files. This topic is your guide to importing data in sales, service, and incentive compensation.

You can create, update, or delete records through import.

The import options and other details differ by the type of data that you're importing. Before importing, understand how the data in your file maps to the attributes in Oracle Applications Cloud and what values are expected in the import file. The data records in the CSV source file may not be processed in the listed order. To learn how to monitor the status of your import, see the topic How You Monitor Your Import Activities in the Related Topics section.

> **Note:** Don't submit duplicate import jobs for the same import object as they create duplicate object records.

To help you get started, you can use the example import object templates described in the related topics.

Import Data from a File

To import data:

1. Click **Tools** > **Import Management**.
2. On the **Manage Imports** page, click the **Create Import Activity** button.
3. On the **Enter Import Options** page provide values for each field as shown in the following table:

Field	Description of the value
Name	Name of the import.
Object	Object that you're importing. If you can't find your object, then search for it by clicking the **Search** link. In the **Search and Select** dialog box, enter the object name in the **Object** text box and click the **Search** button. Select your object from the result list and click **OK**. You can also use the advanced search option by clicking the **Advanced** button. Here you can search based on various filter criteria such as object name, Attachment supported, creation date, and so on. If the object you're importing isn't listed then verify if you have the roles and privileges required to import the object. For information on the roles, see the topic Roles Required for Import and Export Management referenced in the Related Topics section.

Field	Description of the value
Attachment Object	To import an attachment for an existing object record in the database select the Attachments object from the **Object** drop-down list. Next select the object from the **Attachment Object** drop-down list. For more details on importing attachments, review the topic Import Attachments.
File Name	Browse and select a text file in CSV format. The first row of the source file is treated as the header row. Provide a file name within 40 characters. **Note:** If your source file has more than 50,000 records, then you must manually split the file into several smaller files with less than 50,000 records each. The file import page only permits 50,000 records for each import job. Alternatively, you can use the External Cloud Data Loader Client, which can accept files with more than 50,000 records. See the My Oracle Support (support.oracle.com) document External Data Loader Client (document ID 2325249.1) for more information about this tool.
Import Object Hierarchy	To import a hierarchy of objects, such as child and grandchild objects, click on the **Import Object Hierarchy** link after you upload the source file for the parent object. Next select the Enabled check box for the child object you want to import, and select the related source file.

4. Optionally, to set additional import configurations, click the **Advanced Options** section. Here you can configure settings under **Source File**, **Import Options**, or **Create Schedule** sections.

    a. In the **Source File** and **Import Options** regions, some of the options in the following table might not be available depending on the object that you're importing:

Option	Description
Import Mode	You can specify whether you want to create and update records or update them only. - **Update and create records** - a new record is created if a matching record isn't found. This is the default option. - **Create records** - all the records in the file are new records which have to be created. If there are any existing matching records, then they're marked as errors. - **Delete records** - all the records in the file are deleted.
Enable High-Volume Import	The high-volume import mode is designed to import millions of records at once. This mode doesn't trigger any custom logic configured through the application composer. For a list of supported objects, see the topic Data Import Options. By default, this mode is enabled for the supported objects.

Option	Description
	Note: If ZCA_FILE_IMPORT_ENABLE_CUSTOM_BUSINESS_LOGIC is set to “Yes”, then you won’t be able to use High Volume import.
Enable Survivorship	Survivorship on update is available for Account, Organization, Contact, and Person. The check box is visible if the attribute survivorship is configured on the objects. You can use high-volume import mode, only when the survivorship configuration uses only Source Confidence. You can't use the high-volume import mode when Data Quality Rules are enabled.
Notification email	The email of the individual who receives import processing notifications. The user submitting the import receives an email notification automatically. To have more than one email recipient, separate the email addresses with a semicolon. If you don't want to receive the notification, then set the profile option ORA_ZCA_IMPEXP_ENABLE_EMAIL_NOTIFY to 'N' at user level.
Enable Custom Business Logic	If you select this check box, then any custom triggers and validations configured for the object are enabled. This may affect import performance, because of configurations. Hence, disable this option for better performance. To enable this check box by default, set the profile option ZCA_FILE_IMPORT_ENABLE_CUSTOM_BUSINESS_LOGIC to 'Yes' by navigating to the Manage Administrator Profile Values task. **Note:** If ZCA_FILE_IMPORT_ENABLE_CUSTOM_BUSINESS_LOGIC is set to “Yes”, then you won’t be able to use High Volume import. **Note:** This selection has no effect on events and object workflows, and is applicable only on triggers and validations.
Delimiter	If your file doesn't use a comma to separate values, then select the correct delimiter in the **Delimiter** drop-down list. Possible values are: - Caret Symbol - Closing Curly Bracket - Closing Parenthesis - Closing Square Bracket - Colon

Option	Description
	- Comma - Exclamatory Mark - Minus - Opening Curly Bracket - Opening Parenthesis - Opening Square Bracket - Pipe Symbol - Plus - Question Mark - Semi-Colon - Star Symbol - Tilde Symbol
Decimal Separator	The decimal separator used in your import file.
Date Format	The format of the date fields in your file.
Time Stamp Format	The format of the time fields in your file.
File Encoding	The format in which your source file is encoded. The possible values are: - Chinese Simplified - GB, CP936 - Chinese Traditional - CP950 - Eastern European - Win, CP1250 - Greek - MS Windows, CP932 - Japanese - Shift- JIS, CP932 - Unicode - UTF-16 - Unicode- UTF-16BE, Mac, Unix - Unicode - UTF-16LE, MS Windows - Unicode - UTF-8 - Western European - Win, CP1252 **Note:** The above mentioned encoding formats are the only ones supported. Importing file with any other format, such as ANSI, will cause unexpected characters to be imported.

b. In the **Create Schedule** region, schedule the import to run immediately or at a future date. If you select a future date, then provide the date and time to start the import.

You can save the Advanced Options for subsequent reuse by clicking on the Save advance options link in the UI. The options will be retained till you click on the Reset link and reset the options to application defaults.

> **Note:** All fields except Import Mode, Enable Custom business Logic, Enable High-Volume Import, Enable Survivorship Logic, Schedule Mode, and Schedule Start Time will be saved.

5. Click **Next**. The **Map Fields** page shows the first row of the data from your source file. By default, the application tries to automatically map each of the source file columns to the appropriate target object attribute. If some of the columns in your file couldn't be mapped, then drag the target attribute onto the **Attribute Display Name** column under the **Source File** region.

   The data in unmapped columns aren't imported.

   You can save your import map by clicking on **Save As** in the Create Import Activity page. You can use the saved map for future imports. You can view your saved maps by clicking on the **Import Mapping** drop down list in the Create Import Activity page.

   Also, you can select and then edit your saved maps for the specific objects in the Import Objects page.
6. You select a predefined mapping from the list of available mappings under the **Import Mapping** drop-down list. If you're reusing an import mapping, then both the source and target columns are already populated.

   Leave the Attribute Display Name field blank for any column that you don't want to import.

   Click **Validate Data** to check the field mapping.
7. In the case of hierarchical import, you can see the mapping information for child objects in the subsequent tabs. Note that data validation isn't done for these objects.
8. Click **Next**. On the **Review and Submit** page, review the import activity configuration. If you had not run the prevalidation on the **Map Fields** page, then you get a notification message to run the validation process. You can view any unmapped columns of parent or child objects on this page.
9. Click **Validate Data** to check the data in your source file. Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns, and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

   > **Note:** In import activity with single CSV hierarchical records, explicit validation from the mapping UI isn't supported. For example, while importing the sales territory object, if there are matching values for the attributes ParentUniqueTerritoryNumber and UniqueTerritoryNumber, then validation isn't supported.

   > **Note:** During the import validation process on the Mapping page, the following custom triggers aren't supported:
   > - Before InValidate
   > - Before Remove
   > - Before Insert in Database
   > - Before Update in Database
   > - Before Delete in Database
   > - Before Rollback in Database
   > - After Changes Posted to Database

10. Click **Submit** to queue the import.

    Note that business events aren't fired when using Import Management.

Automating and Scheduling Import Jobs

You can automate import jobs using the import REST services. The import REST services let you manage import activities, manage activity maps, and export object metadata. You can use an external scheduler that uses these REST services to run recurring import jobs, create and run import activities, manage maps, and review object metadata.

You can use the Oracle WebCenter Content Document Transfer Utility to manage the import files used by the scheduler. You can download the Oracle WebCenter Content Document Transfer Utility by navigating to the My Oracle Support (support.oracle.com) document Oracle WebCenter Content Document Transfer Utility Readme (document ID 1624063.1). Once downloaded, you can run the tool by navigating to the ridc folder after extraction.

For detailed instructions on automating and scheduling file import using REST API, see Oracle CX Sales and Fusion Service: Automating and Scheduling File Import Activity Using REST API (Doc ID 2308691.1) article on My Oracle Support (support.oracle.com).

Set Up Event Notifications for Resources

In file-based data import, the `SendCredentialsEmailFlag` attribute allowed the import to specify the notification setting for each employee resource. You can do this in Import Management using the User Category option but this applies to all resources in a single import.

To set up notifications for all events:

1. Navigate to **Tools** > **Security Console** on the home page.
2. Click the **User Categories** tab.
3. Click DEFAULT. Click the **Notifications** tab.
4. Click the **Edit** button. If you want to turn on all notifications, then select the **Enable Notifications** check box under the Notification Preferences heading.
5. Click the Save button.
6. Click the Done button.

To set up notifications for a specific event:

1. Navigate to **Tools** > **Security Console** on the home page.
2. Click the **User Categories** tab.
3. Click DEFAULT. Click the **Notifications** tab.
4. Click the Edit button.
5. If you want to turn on a specific event notifications, click the template for the desired event.
6. On the **Template Information** page, select the **Enabled** check box and click **Save and Close**.
7. Click the **Save** button.
8. Click the **Done** button.

Import FCLs and DCLs

Setting FCL Field values

You must pass the lookup code in order to set the FCL field using import management.

Setting FCL and DCL Fields to Null

You must pass #NULL value for the FCL field in order to nullify a value for an FCL using Import Management.

Here is an example to nullify TargetGlobalPJDetailFlag1_c field:

PartyId	TargetGlobalPJDetailFlag1_c
100000001527765	#NULL

Related Topics

- How do I import attachments?
- How do I monitor import activities?
- How do I map import fields?
- What are the available data import options?
- What are the roles required to import or export data?

How do I delete data?

This topic shows how to delete data using import management

To delete data:

1. Create an import activity as described in the topic *How do I import data?*
2. Enter a name for your import.
3. In the **Object** drop-down list, select the Object.
4. Click **Advanced Options** and under the Import Options section, select **Delete** records from the Import Mode drop-down list. Click **Next**.
5. On the Map Fields page, map the source and target attributes.
6. Click **Next** to navigate to the Review and Submit page. Review the import activity configuration and click **Submit** to activate the import. You can view the status of the submitted import on the Manage Imports page.

Note: The identifier that you use to delete a record should be unique across the database.

Related Topics

- How do I import data?
- Delete Attachments
- Delete Notes
- Delete Custom Object Data

How do I import attachments?

You can import attachments associated with any supported object.

Supported Objects and File Types

The following objects support importing attachments:

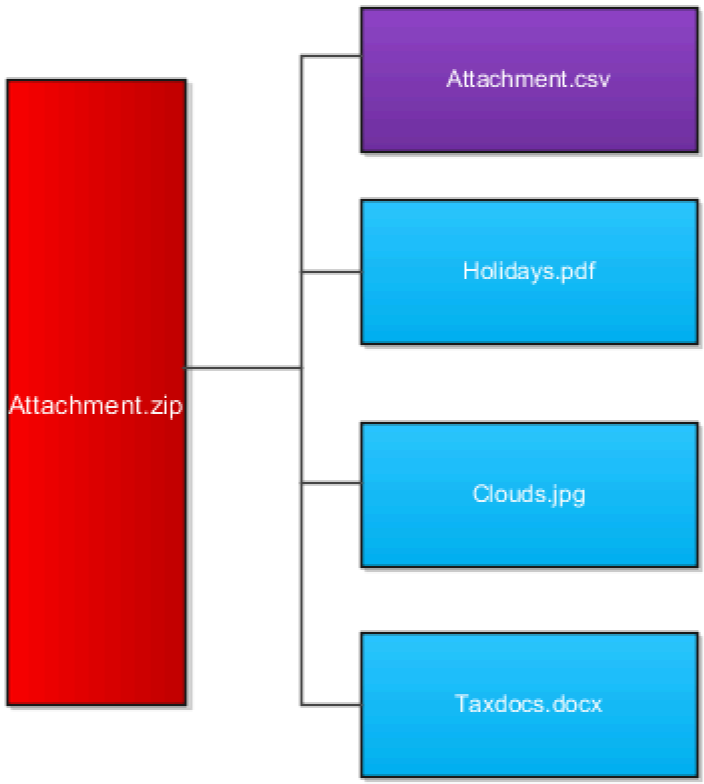
- Account
- Activity
- Asset
- Business Plan
- Contact
- Custom Object
- Deal Registration
- Household
- Message
- Objective
- Opportunity
- Opportunity Revenue
- Partner
- Partner Program
- Product
- Sales Lead
- Sales Lead Product
- Service Request

The following file types are supported for attachment files:

- CSV
- DOC
- DOCX
- JPG
- PDF
- PNG
- PPTX
- TIF
- TEXT
- XLSX
- XML
- ZIP

How to Create ZIP File

To import an attachment, you must create a ZIP file that contains the source data file and optionally one or more attachment files. Make sure you always name the source file as 'Attachment.csv'. You must mention each of the attachment file names in the Attachment.csv file. The Attachment.zip file has the structure shown in the following image:



Here are the examples for the attachment.csv file shown in purple box in the image above:

Pk1Value	ObjectPuid	FileName	Url
100100004247330			http://www.yahoo.com
100100004247330		Clouds.jpg	
100100004247330		Taxdocs.docx	

Pk1Value	ObjectPuid	FileName	Url
	CDRM_6493		http://www.google.com
	CDRM_6493	Holidays.pdf	

Note:

- Pk1Value and ObjectPuid column values uniquely identify an existing object record. FileName indicates the name of attachment files. Url indicates the value of URL attachment to import.
- The exact file name must exist in the zip file such as Document.pdf
- The attachment ZIP file name can include characters such as parenthesis (), ampersand (&), dots (.), and apostrophe (') only. You shouldn't have more than one period (.) in your attachment name. Also, the rootname.extension shouldn't be more than 80 characters.
- An attachment can only be associated with an existing record of the object. A single record can be associated with multiple attachments by having multiple rows in the CSV file. You can import any number of attachments in an import job, but the ZIP file should not exceed 250 MB in size.
- A record in the CSV file can't have values for both FileName and Url columns. You can pass either the Primary key or the PUID for an object record. If you pass both Primary key and PUID values, then Primary key will be considered and PUID will be ignored.
- The AttachedDocumentId should be left blank.
- The DatabaseTitle shouldn't be higher than 79 character.

How to Import Attachments

To import attachments:

1. Click **Tools** > **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. On the Enter Import Options page, enter a name for your import. From the **Object** drop-down list select **Attachments**.
4. In the **Attachment Object** drop-down list that appears, select the object associated with the attachment.
5. Select the ZIP file that you created in the previous section.

6. Click **Next**. On the **Map Fields** page, click the **Apply** button next to the **Import Mapping** drop-down list to map the source and target attributes automatically.
7. Click **Next** to navigate to the **Review and Submit** page.

Review the import activity configuration and click **Submit** to activate the import. The **Manage Imports** page shows the status of the submitted import. The topic Import Data in the related topics section contains more details about the import process.

Related Topics

- How do I import data?

Delete Attachments

This topic shows how to delete attachments using Import Management. You can delete attachments associated with any supported object.

Before You Start

To delete attachments during an import activity, you need the source object ID (either the parent public unique identifier or the primary key).

Steps to Retrieve the Source Object IDs

- Run a GET query on the source object (with valid filter criteria) to obtain the correct source object keys (such as public unique identifier, primary key and so on). For example, you can retrieve PartyNumber and Party ID of the account object using GET query on the account object.
- Alternatively you can submit an export activity using Export Management on the source object (with valid filter criteria) to obtain the correct Source object keys.

Delete Attachments Using Import Management

To delete attachments using Import Management:

1. Create an import activity as described in the topic Import Data.
2. Enter a name for your import. In the **Object** drop-down list select **Attachment**.
3. In the **Attachment** Object drop-down list, select the object associated with the attachment.
4. Select the ZIP file that contains the attachment files and the source data file with the object records information for which you want to delete the attachment.
5. Click Advanced Options and under the Import Options section, select Delete records from the **Import Mode** drop-down list.
6. The ZIP file must contain at least a file named Attachment.CSV, and optionally one or more attachment files. The Attachment. CSV file has the following format:

Pk1Value	ObjectPuid	FileName
300100111735265	N/A	ReadMe.txt

Pk1Value	ObjectPuid	FileName
N/A	CDRM_L1011	N/A
300100111735265	N/A	N/A
N/A	CDRM_L1212	Template.txt

Pk1Value and ObjectPuid column values uniquely identify an existing object record. FileName indicates the name of attachment files to delete during the import.

You can associate an attachment only with an existing object record. A single record can be associated with multiple attachments by having multiple rows in the CSV file. There's no limit on the number of attachments that can be deleted in a single import job. However, the size of the attachment ZIP file can't exceed 250 MB.

> **Note:** You can pass either the Primary key or the Public Unique Identifier, but not both for an object record.

7. Click **Next** and map the source and target attributes.
8. Click **Next** to navigate to the Review and Submit page. Review the import activity configuration and click **Submit** to activate the import. You can view the status of the submitted import on the Manage Imports page.

Related Topics

- How do I import data?
- How do I import attachments?

How do I import notes?

This topic shows how to import notes using the Import Management feature. You can attach a note to an existing object record.

Types of Notes

Note can be one of the following types:

- GENERAL
- REFERENCE
- SPECIAL

A note with line break may not be imported with the correct formatting. To ensure you import the content with the line breaks, insert a
 instead of a line break in the note. Refer to *Notes Imported Does Not Show In Correct Format In UI* for more information.

Before You Start

Before importing the note, make sure to import the object record to attach the note. You can import an object, such as Sales Lead, using Import Management. See the topic Import Data for the details on importing. After the import completes, note the primary key and PUID of the record created using the success log file.

How You Import the Note

You're set to import the note and associate with the object record. Use the following steps to import notes using Import Management.

1. Click **Tools** > **Import Management**.
2. On the **Manage Imports** page, click the **Create Import Activity** button. On the **Enter Import Options** page, enter a name for your import. In the **Object** drop-down list select Note.
3. In the Note Object drop-down list that appears, select the object to associate with the note, such as Sales Lead.
4. Create the note CSV file in the following format.

ObjectPuid or SourceObjectId	NoteTxt	NoteTypeCode
CDRM_82807 or 300100181729328	A sample note text	SPECIAL

   You must provide either ObjectPuid or SourceObjectId in the source file, but not both.

   ObjectPuid - The public unique identifier of the object. In case of Sales Lead, this refers to the LeadNumber value.

   SourceObjectId - The primary key of the object. For Sales Lead, this refers to the LeadID value.

   NoteTxt - The note entry.

   NoteTypeCode - The category of the note. The possible values are GENERAL, REFERENCE, and SPECIAL.
5. Browse the source CSV file and create the import activity.
6. Review the import activity configuration and click submit to activate the import. The Manage Imports page shows the status of the submitted import.

Delete Notes

This topic shows how to delete notes using Import Management.

To delete notes:

1. Create an import activity as described in the topic Import Data.
2. Enter a name for your import. In the Object drop-down list, select Note.
3. In the Note Object drop-down list, select the object associated with the note.

4. Create your source file as per following table:

NoteId	NoteTxt
300100177503663	Note Text

   Here NoteId uniquely identifies the note record, and NoteTxt is the text associated.
5. Click Advanced Options and under the Import Options section, select Delete records from the Import Mode drop-down list. Click Next.
6. On the Map Fields page, map the source and target attributes.
7. Click Next to navigate to the Review and Submit page. Review the import activity configuration and click Submit to activate the import. You can view the status of the submitted import on the Manage Imports page.

   > **Note:** You can use the same method to update a note. However, select the Import Mode 'Update and create records'.

Related Topics

- How do I import data?

Manage Hierarchical Import Templates

Hierarchical import templates contain import object hierarchy and advanced import job configurations that you can reuse every time you create an import.

Hierarchical import template is a CSV file that contains information about the import activity such as import object name, object hierarchy details, and advanced import configurations. This topic describes the various options to manage these templates.

Why use Hierarchical Import Templates

Templates have the following benefits:

- They are useful while creating hierarchical imports. You can reuse the template file every time you create an import with the same object hierarchy and import configuration.
- You can easily migrate the templates from one environment to another.
- Administrators can create a set of templates that can then be downloaded and reused at multiple sites.

Create Hierarchical Import Template

To create a template file:

1. Navigate to **Tools** > **Import Management** > **Import Configuration** > **Manage Template** > **Create Template**.
2. On the **Create Template** page, provide the template summary information such as name, object details, and the description.

3. Select the import object from the **Object** drop-down list and click the **Import Object Hierarchy** link to select the object hierarchy. Select the **Enabled** check box for each object to import. You can select the child objects under the parent hierarchy only after selecting parent object.
4. Select the advanced options for your import and click **Save and Close**.

Upload Hierarchical Import Template

You can upload the templates to use them across environments. For example, you might want to download the template from one environment, and upload to another environment.

You can upload a template file in CSV format using the **Upload Template** button on the **Manage Template** page.

Edit Hierarchical Import Template

To edit an existing template:

1. On the **Manage Template** page, click the template number link for the template to edit.
2. On the **Template Summary** page, you can change the object in the hierarchy by selecting the **Enabled** check box.
3. After making any desired changes on the page, click **Save and Close**.

Copy, Download, or Delete a Hierarchical Import Template

To copy, download, or delete a template:

1. On the **Manage Template** page, click the template number link for the required template.
2. On the **Template Summary** page, under the Actions menu, you can find the options to copy, download, or delete your template file.
3. If you want to copy a template, click **Copy Template**. A copy of the currently selected template is created and the template name is prefixed with the text 'Copy of'. Make any required changes to the template name, description, and advanced import options. Click Save and Close.
4. To download a template file, click the **Download Template** option from the **Actions** menu. You can save the file as a CSV file to your directory.
5. To delete a template, click the **Delete Template** option from the **Actions** menu. Only the user who created the template can delete it.

Import Using Hierarchical Import Template Files

To create an import activity using a template file:

1. Navigate to **Tools** > **Import Management** > **Import from Template**.
2. The **Template Summary** section shows the list of available templates for use, along with the top-level import object. When you select a template, the **Hierarchy Objects** section shows the object hierarchy for the template.
3. Select your template and click **Continue with Template**. On the **Enter Import Options** page, your object hierarchy is preselected and the advanced import configurations are already selected for you. If required, you can change these configurations for your import.
4. Upload the CSV files for your selected objects and click **Next**.
5. Provide the mapping information for your import on the **Map Fields** page.
6. Review your import details on the **Review and Submit** page, and submit. For more details on creating an import, see the topics Example of Importing Contracts Using Hierarchical Import and Import Data.

Related Topics

- How do I import data?
- Example of Importing Contracts Using Hierarchical Import

Example of Importing Contracts Using Hierarchical Import

You can use Import Management to import objects with complex hierarchies and relationships, such as Territories, Contracts, and Subscriptions. The hierarchical import feature helps you to import a hierarchy of objects.

You can set up a parent-child hierarchy of objects, define the CSV files to import for each hierarchy node, start, track, and monitor the status of the overall import job. This example explains how to import Contracts hierarchical data using hierarchical import. Following is the schematic of object hierarchy:

- Contract
  - Contract Line
  - Contract Party
    - Contract Party Contact

Import Contracts Data

To import the Contract object, its children Contract Line and Contract Party objects, and the Contract Party Contact grandchild object using hierarchical import:

1. Click **Tools** > **Import Management** > **Create Import Activity**.
2. On the **Enter Import Options** page, select the parent Contract object, enter the import name, and select the source CSV file for Contract object. For more information about creating an import, see the topic Import Data.
3. Click the **Import Object Hierarchy** link. Now you can see the object hierarchy for Contract, showing the child and grandchild objects. Select the **Enabled** check box for the objects you want to import. For this example, select the check boxes for Contract Line, Contract Party, and the Contract Party Contact objects in that order.
4. Select the CSV file for each of these objects and click **Next**.
5. On the **Map Fields** page, the application tries to automatically map the target attributes to the source file attributes for each object. For the attributes that couldn't be mapped, you should map manually by clicking the **Save As** button. You can see the mapping information for child objects on the subsequent tabs. After mapping each object attribute, click **Next**.
6. After reviewing the import information on the **Review and Submit** page, submit the import.
7. On the **Manage Imports** page, you can see the status of import for parent, child, and grandchild objects in the form of tree structure.
8. You can verify your contracts after import completes by navigating to **Contract Management** > **Contracts**.

Related Topics

- How do I import data?

Import Descriptive Flexfields

A flexfield is a flexible data field that your organization can configure according to your business needs. Descriptive Flexfields (DFF) capture additional business information such as the name of the company's owner.

DFF's data are stored in the attributes. These are fixed set of custom fields and can be of data type VARCHAR2, NUMBER, DATE, or TIMESTAMP.

For more information on DFFs see the chapter Flexfields in the guides Oracle Applications Cloud Configuring and Extending Applications (http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=OAEXT) and Oracle Sales Implementing Incentive Compensation (http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=OAWIC) available on the Help Center.

Objects Supporting the DFF Import

The objects that support the DFF fields are:

- Contract (child object is Contract Header Descriptive Flexfield)
- Contract Line (child object is Contract Line Descriptive Flexfield)
- Contract Party (child object is Contract Party Descriptive Flexfield)
- Contract Party Contact (child object is Contract Party Contact Flexfield)

How you Register new Objects for DFF Support

Follow these steps to register any new object for DFF support:

1. In the Navigator, click **Tools** > **Import Management**.
2. On the **Manage Imports** page, click the **Create Import Activity** button.
3. Create an import by selecting the Contract object from the drop-down list. For more information on creating an import, see the topic Import Data.
4. Once the import completes, create another import by selecting the Contract Header Descriptive Flexfield child object from the drop-down list.
5. In the source CSV file, include the ContractPuid header attribute and provide the value you entered for the parent object import. For each DFF field, provide its Table Column name in the header. Select the source CSV file and click **Next**.
6. Click Next to go to the **Map Fields** page. Here you can see only the AttributeNames and not the DFF attribute labels. Map the attributes and click Next. Submit the import on the **Review and Submit** page.
7. To verify your contracts after import completes, navigate to **Contract Management** > **Contracts**.

Note: Only high-volume import supports importing DFF fields.

Related Topics

- How do I import data?
- Import Your Contract Line Descriptive Flexfield Data
- How do I import contract header descriptive flexfield data?
- Import Your Contract Party Contact Descriptive Flexfield Data
- Import Your Contract Party Descriptive Flexfield Data
- Flexfield Components
- Overview of Flexfields

How do I generate the diagnostics log for import?

The diagnostic log files provide complete information about an import job and its errors. If you have errors in your import job, then provide the diagnostic logs to technical support to help them resolve the issue.

You can generate the diagnostic logs by clicking the Generate button. You can then attach the log files (in ZIP format) to the Service Request (SR). This helps technical support to resolve the issues.

To generate the diagnostic logs for an import:

1. Click **Tools** > **Import Management.**
2. On the **Manage Imports** page, click the **Name** link for your import that has failed.
3. On the **Import Status** page, click the **Generate Diagnostics** button in the **Action** menu to generate the diagnostics files.

See the Import Attachments section for the link to download the generated files. Click Download under the Actions column to download the file. For more information about the files, click on the details icon.

Import Data with Special Characters

You need to format the data, if your import file includes special characters. Follow the methods described in this topic to ensure that source data is properly parsed and imported by Sales and Fusion Service.

Build the CSV File

To build your CSV file for importing data:

1. Click **Tools** > **Import Management** > **Import Objects**.
2. On the Import Object Details page, click the Download icon to save the CSV template file for your object to your desktop.
3. You can edit the file to include only those fields that you import. For more information on using the import object template, see the topic Use Import Object Templates to Import Data.

Enter Data in the CSV File

After creating the CSV file, you must enter the data to be imported. Some of the special characters are quotation marks(") and a comma(,). You must prefix the special characters with quotation marks(").This list shows the different formats in which the input data can be entered for the Lead object CSV file and how it's interpreted due to the presence of special characters. LeadName and LeadNumber are the header fields for the file.

This table lists five Lead records of a CSV file, each with the LeadName first, followed by the LeadNumber (120, 121, and so on).

LeadName	LeadNumber
Mark Twain lead	120
"Twain "secondary" lead"	121
Twain, Mark	122
Twain, Mark "Spring 2015" lead	123
"Twain "Fall 2014" lead	124

You can use escape characters for the Lead Name source data records, as shown in this table.

Row Number	Source Data for LeadName	How LeadName is Written to Database if no Escape Characters are Added	Data with Escape Characters to Preserve Original Data	How LeadName is Written to Database When Escape Characters are Included	Comment Regarding Escape Characters
1	Mark Twain lead	Mark Twain lead	Not applicable	Not applicable	No escape characters are needed as the source data contains no special characters.
2	"Twain "secondary" lead"	Twain secondary" lead"	"""Twain ""secondary"" lead""",121	"Twain "secondary" lead"	The two series of three quotation mark each: • The quotation marks surrounding the field which is required to precede the quotation marks in the source data • The quotation marks in the source data

Row Number	Source Data for LeadName	How LeadName is Written to Database if no Escape Characters are Added	Data with Escape Characters to Preserve Original Data	How LeadName is Written to Database When Escape Characters are Included	Comment Regarding Escape Characters
3	Twain, Mark	Twain	"Twain, Mark",122	Twain, Mark	Double quotation mark is required to surround the field entry, as a comma is in the source data. No additional escape character is required to precede the comma.
4	Twain, Mark "Spring 2015" lead	Twain	"Twain, Mark ""Spring 2015"" lead",123	Twain, Mark "Spring 2015" lead	A double quotation mark is required to surround the field entry, as at least one special character is present in the source data. Every double quotation mark in the source data requires a double quotation mark escape character. No additional escape character is required to precede the comma.
5	"Twain "Fall 2014" lead	Twain Fall 2014" lead	"""Twain ""Fall 2014"" lead",124	"Twain "Fall 2014" lead	Although the missing end quotation mark in the source data is likely a typo, the source data must be written as it appears. Enter three double quotation marks at the beginning, but only a single (surrounding) double quotation mark at the end.

- If the source data contains at least one special character, the field of source data must be entered in double quotation marks in the CSV file.
- If the data for a field contains separator such as a comma (,), you must enclose the content within two double quotation marks.
- If the first field has a special character at the beginning but not any matching special character at the end, the content of the second field will also be considered as part of the first field, and the second field is blank. You must provide a matching escape character.
- If you don't precede the special characters by an escape character, the import process may write incorrect data for a field, or incorrectly write data to the subsequent fields.

When you import files with special characters, the special characters are converted into unreadable characters. You can resolve the issues by saving the import file in UTF-8 format.To save a file in UTF-8 format:

- Choose File->Save as from the menu.
- In the 'Save as type' drop down > select 'Text (Tab delimited) (*.txt)'
- Select 'Web Options' in the 'Tools'
- Select the 'Encoding' tab.
- In the 'Save this document as:' drop down, select 'Unicode (UTF-8)'"
- Click Save

Related Topics

- Use Import Object Templates to Import Data
- How do I import data?

What are the roles required for import and export management?

You require certain duties and roles to perform activities related to import and export management. Oracle ships several OOTB roles with access to Import and Export data from CX Sales. You can select and use administrator level roles as needed.

You can get additional information about the duties and roles in the Security Reference for Sales and Fusion Service guide.

Enhanced Data Privacy

You can only view import and export jobs that you submitted. You can't view the import and export jobs and associated data files submitted by other users. However, you can still view import jobs as part of the management reporting hierarchy. Managers can view their directs' imports and exports.

Administrators can configure this by setting the profile option **ORA_ZCA_IMPEXP_RESTRICT_USERACCESS** to **Y** by navigating to **Setup and Maintenance** > **Search** > **Manage Administrator Profile Values task** Search for the profile option code.

Roles for Import and Export

This table lists the set of roles required to import and export top-level objects. The values in brackets are the role codes. In the case of multiple roles listed, you need any one of the mentioned roles.

Note: You can import or export a child-level object if you have the role applicable to the parent object.

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Access Groups	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Account	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Action	Internal Service Request Administrator (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)
Action Plan	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR) Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION) HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR) Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION) HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION)
Activity	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB), Channel Administrator (ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB), Channel Partner Portal Administrator (ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB) Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB),
Asset	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Attachments	FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID, Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY) Sales Lead Processing (ORA_MKL_SALES_LEAD_PROCESSING_DUTY)	Customer Contract Administrator(ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB), Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY) , Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB), Supplier Contract Administrator (ORA_OKC_SUPPLIER_

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB) Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB) Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB) Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB) Marketing VP (ORA_MKT_MARKETING_VP_JOB) Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY) Customer Contract Administrator (ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB) Customer Contract Manager (ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB) Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB) Enterprise Contract Manager (ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB) Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB) Supplier Contract Manager (ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB) Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB) Sales Catalog Administrator (ORA_QSC_SALES_CATALOG_ADMINISTRATOR_JOB) HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION) Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR) Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB) Sales Manager (ORA_ZBS_SALES_MANAGER_JOB) Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB) Customer Relationship Management Application Administrator (ORA_ZCA_	CONTRACT_ADMINISTRATOR_JOB), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Administrator (ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB) Channel Account Manager (ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB) Channel Administrator (ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB) Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB) Channel Partner Manager (ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB) Channel Partner Portal Administrator (ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB) Channel Sales Director (ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB) Channel Sales Manager (ORA_ZPM_CHANNEL_SALES_MANAGER_JOB) Sales Analyst (ORA_ZSP_SALES_ANALYST_JOB)	
Business Plan	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Campaign	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Case	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Classification Code	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Competitor	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Consumer	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)
Contact	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Contract	Customer Contract Administrator (ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB), Customer Contract Manager (ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB), Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB), Enterprise Contract Manager (ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB), Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB), Supplier Contract Manager (ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB)	Customer Contract Administrator (ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB), Customer Contract Manager (ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB), Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB), Enterprise Contract Manager (ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB), Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB), Supplier Contract Manager (ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB)
Contests	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Country Structure	Geography Administration (ORA_GEO_ADMIN_DUTY)	Geography Administration (ORA_GEO_ADMIN_DUTY)
Custom Object	Custom Objects Administration (ORA_CRM_EXTN_ROLE), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Custom Objects Administration (ORA_CRM_EXTN_ROLE), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Deal Registration	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Duplicate Resolution Request	ORA_ZCH_DATA_STEWARD_MANAGER	ORA_ZCH_DATA_STEWARD_MANAGER
Event	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Event Team Member	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Geography	Geography Administration (ORA_GEO_ADMIN_DUTY)	Geography Administration (ORA_GEO_ADMIN_DUTY)
Goals	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Hierarchy	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Hierarchy Member	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)
Household	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Hub Source System Reference	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)
Incentive Rule Assignments	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Incentive Rule Attribute Values	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Incentive Rules	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Incentive Transaction	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Interaction	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration(ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration(ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
`Kpi`	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
MDF Budget	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
MDF Claim	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
MDF Request	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Note	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	APPLICATION_ADMINISTRATOR_JOB), FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID	
Objective	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Opportunity	Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY) , Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID	Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY) , Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Organization	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Partner	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Partner Programs	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Person	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Price Book Header	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)
Product	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)
Product Group	Sales Catalog Administrator (ORA_QSC_SALES_CATALOG_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Program Enrollments	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Promotion	Loyalty Program Administrator (ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB)	Loyalty Program Administrator (ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB)
Queue	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Quote and Order	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Resource	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Resource Capacity	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Sales Lead	Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB), Sales Lead Processing (ORA_MKL_SALES_LEAD_PROCESSING_DUTY), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB), Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB), Marketing VP (ORA_MKT_MARKETING_VP_JOB), Sales Analyst (ORA_ZSP_SALES_ANALYST_JOB), FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID, FUSION_APPS_CRM_ESS_APPID	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Lead Processing (ORA_MKL_SALES_LEAD_PROCESSING_DUTY)
Sales Territory	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Restricted User (ORA_ZBS_SALES_RESTRICTED_USER_JOB), Sales VP (ORA_ZBS_SALES_VP_JOB), Channel Account Manager (ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Channel Partner Manager (ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB), Channel Sales Director (ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB), Channel Sales Manager (ORA_ZPM_CHANNEL_SALES_MANAGER_JOB), FUSION_APPS_OBIA_BIEE_APPID, FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ADF_BI_APPID	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Sales Territory Quota	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Restricted User (ORA_ZBS_SALES_RESTRICTED_USER_JOB), Sales VP (ORA_ZBS_SALES_VP_JOB), Channel Account Manager (ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Channel Partner Manager (ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB), Channel Sales Director (ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB), Channel Sales Manager (ORA_ZPM_CHANNEL_SALES_MANAGER_JOB)	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY)
Self Service Role	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)
Service Request	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT)
Standard Text	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION), Internal Service Request Analysis (ORA_SVC_INTERNAL_HELPDESK_ANALYSIS), Internal Service Request Management (ORA_SVC_INTERNAL_HELPDESK_SR_MANAGEMENT), Service Request Channel User (ORA_SVC_SR_CHANNEL_USER), Service Request Power User (ORA_SVC_SR_POWER_USER), Service Request Troubleshooter (ORA_SVC_SR_TROUBLESHOOTER)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Standard Text Folder	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), Internal Service Request

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION), Internal Service Request Analysis (ORA_SVC_INTERNAL_HELPDESK_ANALYSIS), Internal Service Request Management (ORA_SVC_INTERNAL_HELPDESK_SR_MANAGEMENT), Service Request Channel User (ORA_SVC_SR_CHANNEL_USER), Service Request Power User (ORA_SVC_SR_POWER_USER), Service Request Troubleshooter (ORA_SVC_SR_TROUBLESHOOTER)	Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Standard Text User Variables	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION), Internal Service Request Analysis (ORA_SVC_INTERNAL_HELPDESK_ANALYSIS), Internal Service Request Management (ORA_SVC_INTERNAL_HELPDESK_SR_MANAGEMENT), Service Request Channel User (ORA_SVC_SR_CHANNEL_USER), Service Request Power User (ORA_SVC_SR_POWER_USER), Service Request Troubleshooter (ORA_SVC_SR_TROUBLESHOOTER)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Subscription	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)
Subscription Service Charge Mappings	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)
Subscription Usage Event	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)
Template	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Territory Geographies	Geography Administration (ORA_GEO_ADMIN_DUTY)	Geography Administration (ORA_GEO_ADMIN_DUTY)
Vehicles	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)

Related Topics

- Schedule the Send Pending LDAP Requests Process

4 Import Queues

Overview of Import Queues

The Manage Imports page of the Import Queue tab shows the following four types of import queues as infotiles:

- All Imports: This infotile displays the count of active, completed, and unsuccessful imports submitted by all users. Click on this infotile to see a list of all import jobs.
- Active Imports: This infotile displays the count of all import jobs submitted that are either in progress or in queued status. Click on this infotile to see a list of active import jobs.
- My Completed Imports: This infotile displays the count of imports submitted by the current user that are completed (either successful or failed with warnings or errors). Click on this infotile to see a list of completed import jobs created by the current user.
- Unsuccessful Imports: This infotile displays the count of unsuccessful imports submitted by all users. Click on this infotile to see a list of unsuccessful import jobs. These are the imports which couldn't complete because of application error in the import flow.

Import Activities Details

Click on the infotiles to see the following details about the import job:

Column	Description
Name	The name of the import job.
File Name	The name of the source file.
Object	The object imported.
Status	The status of the import job. For more information about the statuses, see the topic How You Monitor Your Import Activities in the related topics section.
Cancel Job	Click the close icon to cancel an active import, if it's running for a long time. Only the user who submitted the import job or an administrator can cancel the job. Once you cancel an import job, you can't restart or resume it. Canceling the import job commits the data processed till that point and leaves the application in a clean state. A partial import may occur depending on the actual stage of the import, when the cancel option is selected. You can manually generate the reports for any processed records from the import status page. **Note:** You can't cancel a high-volume import job.
Estimated Completion Time	The date and time when the import job is expected to be completed.

Column	Description
Start Time	The start date and time of the import.
Next Scheduled Date	The date and time when the import job is scheduled to run.
End Time	The end date and time of the import.
Submitted By	The user who submitted the import.
Rank	The rank associated with the paused job. The job with the highest rank is executed from the job queue. Possible values are integers such as 1, 2, and so on with 1 being the highest.

You can filter the list by clicking on any of these columns.

Related Topics

- How do I monitor import activities?

How do I monitor import activities?

You can monitor imports that were scheduled to run, have completed successfully, or have failed with errors. For each import, you can view the details and make the necessary updates for any failed records that you want to import again.

You can view the list of imports from the **Manage Imports** page of the Import Queue tab. To view the status of an import job click the link in the import's Name column. The **Import Status** page shows the status of the most recently executed instance of the import. The **Import Status** page contains the following sections:

- Status Bar
- Details
- Import Attachments

Status Bar

The status bar shows the progress of the import in a graphical format. It shows the following stages during the import process:

- Import activity queued: The import request is queued for processing, and is waiting to begin execution.
- Preparing data for import: The data from the source file are being loaded in the temporary staging table for further processing.
- Importing data: The data from the source file are being validated and loaded in the target tables.
- Completing import activity: The import data have been loaded in the target tables, and cleanup tasks, such as the generation of log files, are in progress.
- Completed with errors: The import has completed with errors.

- Successful: The import has completed successfully.
- Completed with warnings: The import has completed with warnings.
- Canceled: The import was canceled by the user.
- Unsuccessful: The import was unsuccessful.

Hovering your mouse over the progress bar shows the status on the number of records imported.

> **Note:** If the job is in the same status for a long time, then generate a diagnostic log as described in the topic Generate the Diagnostics Log for Import in Related Topics section. When you raise a service request, attach the diagnostic log files to help technical support to resolve the issue.

Activity and Record Details

The **Activity Details** section shows the name of the import, import activity identifier, object name, and the name of the user who submitted the import. The section on date and time displays the start and end times, estimated completion time, and the time taken to complete the import.

The **Record Details** section displays the number of import records in each stage of processing. The various status details are summarized in the following table:

File Processing Summary Information	Description
Records Read From File	The number of records read from the source file. Clicking the link for the number of records lets you download the spreadsheet file with the records.
Records Loaded Successfully	The number of import object records that were imported to the application destination tables.
Records With Errors Reported	The number of records that failed with errors when importing data from the interface tables to the destination tables. You can view the error details in the Exception and Error files attached to the process. Clicking the link for the number of records lets you download the spreadsheet file with the error records.
Records With Warnings	The number of records that were uploaded with warnings when importing data from the interface tables to the destination application tables. Clicking the link for the number of records lets you download the spreadsheet file with the warning records.
Unprocessed	The number of records that weren't processed.

Clicking on the Advanced Options section shows the advanced configuration options that you had selected when creating the import activity.

The rejected file records don't contain the error message when import job ends in unsuccessful status.

> **Note:** In the files that are generated after the completion of an import activity, all error message values are enclosed within double quotation marks. The use of double quotation marks improves the format of the log files by ensuring that the error messages containing commas aren't treated as multiple values.

Detailed Import Status

The Detailed Import Status page shows the status of the different steps in the import activity. You can navigate to this page by selecting View Detailed Import Status from the Actions menu on the Status page. For each step, this page shows the individual sub tasks of the import process. This information helps the technical support team to fix any issues during the import.

Purge Import Data

Import Management periodically runs an automatic process that purges all data associated with import jobs. This process purges data older than 7 days by default. You can extend this time to 30 days by setting the value in the profile option ZCA_IMPORT_PURGING_DURATION.

If you wish for the data to be purged instantaneously on job completion, you can do the same using the ZCA_IMPORT_PURGE_ON_JOBCOMPLETION profile option. The default value for this profile option is Y and impacts data for all objects except the ones registered as 'ObjectPostProcess'

Alternately, if you want to control purging through the UI from the Import Object Details Page, you can set the ZCA_IMPORT_PURGE_FROM_UI profile option to Y to display the purge option on the Import Object Details page.

Import Attachments

The **Import Attachments** section lists the files associated with this import in a table. The **Actions** column lets you either download the file or view more details. Success log file isn't generated after the import job is completed successfully. To generate success logs for even successfully completed jobs, set the profile option ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION to 'No'. You can download the following files from this section:

- Process Log: Click **Action** > **Generate Log**.
- Diagnostics Log file: Click **Action** > **Generate Diagnostics**.
- Map file: Click the **Download** link to download the import activity map file in CSV format.
- Source CSV file used for the import.
- Exception files that include a row for each record that failed. All the errors for that row are concatenated and displayed in the Error Message column of the file.
- Error file that includes all the errors for each record that failed validation.

Related Topics

- How do I import data?
- How do I generate the diagnostics log for import?

How You Monitor Import Activities Using REST APIs

You can receive import completion notification through REST resource. This avoids the need to keep checking the import status.

To receive import completion notification through REST service, you must define the REST service endpoint in Application Composer. You can configure and register your REST endpoint to receive notification whenever your import job completes.

Register an External REST Endpoint in Application Composer

To register an endpoint for notification:

1. Create and enter into a sandbox by navigating to **Configuration** > **Sandboxes** > **Create Sandbox**.
2. Navigate to **Configuration** > **Application Composer** > **Web Services.** Note that this option is available only when you're inside the sand box.
3. You can edit the existing endpoints, or create a new endpoint such as `ExternalEndPoint1`, by clicking the Create icon.
4. Enter the name of the endpoint and the URL, and select the authentication scheme. For example, your URL can be in the format https://servername/ic/api/integration/v1/connections/cbveTest.
5. Select and configure the POST method by clicking the check box for POST. Currently only POST method is supported for the Import Notification feature.
6. Select and provide the code samples for the request and response payloads. Following is the sample for request and response payloads:

```
{
"items": [],
"count": 0,
"hasMore": false,
"limit": 25,
"offset": 0,
"links": [{
"rel": "self",
"href": "https://servername/ic/api/integration/v1/connections/cbveTest",
"name": "ExternalEndPoint1",
"kind": "collection"
}]
}
```

7. Click **Save and Close**.
8. After making the changes, publish the sandbox to commit your changes.

Validate the Endpoint

You can validate the REST endpoint to ensure that your REST web service configuration in Web Services in Application Composer is correct and the import process can call the endpoint successfully. To validate your REST endpoint and set an endpoint as default:

1. Navigate to **Tools** > **Import Management** > **Import Configuration** > **REST Notification**.
2. Here, select REST Notification as the notification type, and select the endpoint you registered from the **Notification Endpoint** drop-down list. In our example, select `ExternalEndPoint1`.
3. To make this connection as the default one while creating import jobs, select the **Set as default** check box.
4. To validate, click the Payload Details section, and click the Validate REST Endpoint button. If your endpoint is valid, then you see one of the following response statuses in the Response text box:

    - 200
    - 201
    - 202
    - 204

    Any other response status indicates that the endpoint is invalid.

Create the Import Activity and Monitor the Status

1. Navigate to **Tools** > **Import Management** > **Create Import Activity.**
2. Create the import activity, enter the name, and select the object and source file.
3. Click the **Advanced Options** section and select the notification endpoint `ExternalEndPoint1` from the **Notification Endpoint** drop-down list. If you don't want to receive the notification, then select a blank value in the drop-down list.
4. Click **Next** and map the attributes on the **Map Fields** page. Review the configurations and submit the job. For more information on creating an import activity, see the topic Import Data.
5. Once you submit the import, you can monitor the status by accessing the configured endpoint.
6. Alternatively, you can verify whether the notification is submitted by downloading the log files. The last entry in the file indicates the status of notification.

Import Notification in REST and External Data Loader Client (EDLC)

You can use the EDLC command listResthooks to get the list of resources registered in Application Composer. For example,

```
java -jar oscdataloader.jar listResthooks -username importuser -target-url https://mypod.oracle.com
```

You can then use the notification endpoint to get the import notification with the following command:

```
java -jar oscdataloader.jar submit -input-file "AccountCSV.csv" -import-name "AccountImport" -mapping-number
 30010011859 -object Account -username importuser -target-url https://mypod.oracle.com -high-volume -rest-
notification "ExternalEndPoint1"
```

You can use the RestNotification attribute to specify your notification endpoint while creating your import activity using REST. For example, you can use the following sample payload to create your import activity:

```
{
 "Name": "RESTImportActivity",
 "ObjectCode": "Account",
 "HighVolume": "YES",
 "Activate": "YES",
 "RestNotification": "ExternalEndPoint1",
 "DataFiles" : [
 {
 "InputFileContentId": "UCMFA00012159"
 }
]
}
```

The following table describes the behavior when you don't provide the REST notification endpoint in REST and EDLC.

REST Notification Value	Endpoint Used for Import Job	REST Notification Behavior
null	Default endpoint is selected	REST Notification is sent to the default REST endpoint.
REST notification not passed	Default endpoint is selected	REST Notification is sent to the default REST endpoint.
""	No REST endpoint is selected	No REST Notification is sent.

5 Manage Import Mappings

How do I map import fields?

After entering the import options, map the fields in the source file to the corresponding target attributes.

You can do these in the section:

- Automatic Mapping
- Map Fields
- Save the Import Mapping

Automatic Mapping

The automatic mapping feature maps the source file columns to the target attribute columns. The application automatically saves the mapping created under the name **Automatic Mapping** and lists it in the **Import Mapping** drop-down list.

For an import file attribute to get automatically mapped, the column header for the attribute in the import file should be same as the Attribute Name. You can view the Attribute Name and Attribute Display Name in the **Import Objects** tab.

> **Note:** You must map the column headers to the attribute display name when using an exported file to import. The exported file contains the display name as column headers, hence doesn't get automatically mapped.

You can download the import object templates from the Import Objects tab, and use them to create the source CSV file for your import. The templates have prepopulated column headers that ensure that the attributes are automatically mapped.

For auto mapping to work correctly provide the name of the columns in the input CSV. Follow the below steps to create the source CSV file for your import:

1. Navigate to **Tools** > **Import Management** > **Import Objects**
2. Filter the object based on display name of the object or language Independent Code (ObjectCode)
3. Download the file and decompress it.
4. In the file named like <ObjectCode>.csv, remove the 2nd row.
5. Use the names in the first row for column names of the input csv file.

   For more details please refer readme.txt.

You can override a column mapping, by dragging target attributes from **Target Attributes** section to the **Attribute Name** field of the **Source File** section. If you change the mapping, then you must save the mapping with a different name. Once you provide the name, the date and year time stamp is appended to the mapping name. The newly created mapping appears in the **Import Mapping** drop-down list. To apply the automatic mapping instead of your custom mapping, select Automatic Mapping from the **Import Mapping** drop-down list and click **Apply**.

Map the Fields

The Map Fields section can be subdivided into source file columns and target attribute columns. The source column header value is derived from the source file.

The following table outlines the source columns.

Source Column	Description
Column Header	Represents the column header for the text files.
Example Value	Values are derived from the first source file saved with the predefined mapping. If you didn't select a predefined mapping, then the example values are taken from the first data row in the source file selected in the first step of the Import Activity definition.
Attribute Name	Represents the target attribute that's to be mapped to the source column.

The following table outlines the target columns.

Target Column	Description
Target Attribute	The attribute name that represents the corresponding table column for the object.
Required	Indicates whether the target attribute is a required or a user key. Required indicates that the key is required while creating a new record. User key indicates that the key is required while updating an existing record.

Note: For required fields, ensure that data is available for the respective attributes in the input CSV file. You can use the validate function to check if all required fields are available before submitting the import job.

Save the Import Mapping

You can use automatic mapping to map the source file attributes to target attributes as described in the previous section. To map more attributes or override existing mappings, then click **Save As** and save your custom map. The name of a mapping file must be unique for the object.

For more information on how to import your data, see the object-specific import topics in the chapter Import Your Data. These topics are titled Import Your <Object-Name> Data. They provide the following information about importing data:

- How to map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
- Required attributes and validations for the object.
- How to create the source CSV file with the data you want to import.
- How to start an import activity.
- How to check the import results to know if the import went well.

Related Topics

- How do I import data?

Create Import Mappings

An import mapping lets you quickly map your source object attributes to the object attributes in Sales and Fusion Service. You must be an administrator or setup user to create import mappings.

You can create an import mapping in one of the following two ways:

- Create an import mapping manually.
- Generate the import map from the sample source file.
- Create an import mapping only once if your CSV file has the same set of fields.

Create Maps Manually

1. Click **Tools** > **Import Management** > **Import Objects**.
2. Click the Account link under the **Display Name** column to create a mapping for the Account object.
3. On the **Manage Mapping** page, click the **Create Import Mapping** button.
4. On the **Edit Import Mapping** page, enter the name of the mapping, and provide a description for the mapping. The **Target Attributes** section displays the attributes of the Account object that should map to the source file columns. Check the **Required** column to see if the attribute is required or is a user key.
5. In the **Source File** section, click the **Add Column** button to insert a column to the mapping file.
6. To create the mapping column for the Organization Name attribute, drag and drop the Organization Name attribute from **Target Attributes** section to the **Attribute Display Name** column under the **Source File** section.
7. Provide the column header name, such as organization name and an example value, such as Green Corp. Follow the steps 5 to 7 to add any additional mapping columns.
8. Click the **Save and Close** button to save the mapping.

   To edit or download the mapping file, click the mapping number link for your mapping on the Manage Mapping page. On the Edit Import Mapping page, click Download Map from the Actions menu.

Generate Maps from the Source File

1. Click **Tools** > **Import Management** > **Import Objects**.
2. Click the Account link under the **Display Name** column to create a mapping for the Account object.
3. On the **Manage Mapping** page, click the **Create Import Mapping** button.
4. On the **Edit Import Mapping** page, enter name of the mapping, select the object such as Account, and provide a description for the mapping. The **Target Attributes** section displays the attributes of the Account object that should map to the source file columns. Also, check the **Required** column to see if the attribute is required or is a user key.
5. From the **Actions** menu under **Source File** section, click **Select Source File**.
6. In the **Source File** dialog box, choose the CSV file that should be the source for your mapping file. This creates the mapping file based on the column header and example values in the source file.
7. Click **Save and Close** button. And we're done.

   For more information on how to import your data, see the object-specific import topics in the chapter Import Your Data. These topics are titled Import Your <object-name> Data. They provide the following information about importing data:
   - How to map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.

- Required attributes and validations for the object.
- How to create the source CSV file with the data you want to import.
- How to kick off an import activity.
- How to check the import results to know if the import went well.

Manage Import Mappings

Import Mappings map your source data to the fields in the Oracle Applications database. You can reuse existing mappings by editing them. Also, you can download an existing import mapping from one Oracle application instance and upload the mapping into another Oracle application instance.

Copy and Modify a Mapping

To copy or modify a mapping:

1. Click **Tools** > **Import Management** > **Import Objects**.
2. In the **Import Object Details** section, choose the Object name for which you need the template.

   Click the link under **Display Name** column to get to the Manage Mapping page.
3. Click the link under the **Mapping Number** column.
4. On the **Edit Import Mapping** page, select the **Copy Import Mapping** option from the **Actions** menu. Edit the mapping by dragging the target attributes to the **Attribute Display Name** field under **Source File** section.
5. Add more attributes by clicking the **Add Column** button.
6. Once done, give a name for the mapping and click **Save**.

   If you don't want the mapping that you see on the list, select **Delete Import Mapping** from the **Actions** menu.

Download the Map File

To download a map file:

1. Click **Tools** > **Import Management** > **Import Objects**.
2. In the **Import Object Details** section, click the Object name link for which you need the template.
3. Click the link under the **Mapping Number** column for the required mapping.
4. On the **Edit Import Mapping** page, select **Download Map** from the **Actions** menu.

   When prompted, save the file to a location.

Upload the Map File

To upload a map file:

1. Click **Tools** > **Import Management** > **Import Objects**.
2. In the **Import Object Details** section, click the Object name link for which you need the template.
3. On the **Manage Mapping** page, click the **Upload Map** button. Select a map file and click **OK**.
4. On the **Edit Import Mapping** page, give a name and save the mapping.

Download the Import Object Templates

Import Templates give you an idea about the object attributes. Most attributes in the templates include example values that help you know what value to provide in the import file. To download an import object template:

1. Click **Tools** > **Import Management** > **Import Objects**.
2. In the **Import Object Details** section, click the Object name link for which you need the template.
3. On the **Manage Mapping** page, click the link in the **Mapping Number** column for the required mapping.
4. On the **Edit Import Mapping** page, select **Download Template** option from the **Actions** menu.

For more information on how to import your data, see the object-specific import topics in the chapter Import Your Data. These topics are titled Import Your <Object-Name> Data. They provide the following information about importing data:

- How to map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
- Required attributes and validations for the object.
- How to create the source CSV file with the data you want to import.
- How to kick off an import activity.
- How to check the import results to know if the import went well.

Import Mappings

Click Tools Import Management Import Objects . Click the Object link to navigate to the Manage Mapping page.

You can create a mapping by clicking the **Create Import Mapping** button. For more details about creating a mapping, refer to the topic Create Import Mappings. Click the mapping you created to navigate to the **Edit Import Mapping** page where you can edit your mapping.

The **Edit Import Mapping** page contains the following sections:

- Source File
- Target Attributes

Source File

Here are the details related to columns provided in the source file:

Source Column	Description
Column Header	The column name expected in the source file.
Example Value	Values from the first data row in the source file.
Attribute Display Name	Represents the target attribute that's to be mapped to the source column.

Source Column	Description
Select Source File	Use this button from the **Action** menu to import mapping from a source file.
Delete Column	Use this button from the **Action** menu to delete a column from the mapping file. This option is enabled only when at least one column is added to the Source File section.

Target Attributes

Here are the details related to corresponding attributes in the target application table:

Target Attributes	Description
Target Attribute	The attribute name that represents the corresponding table column for the object.
Required	Indicates whether the target attribute is a user key or a required key.
Default Value	Default value for the attribute if any.
Description	Provides a brief description of the attribute.

For more information on how to import your data, see the object-specific import topics in the chapter Import Your Data. These topics are titled Import Your <Object-Name> Data. They provide the following information about importing data:

- How to map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
- Required attributes and validations for the object.
- How to create the source CSV file with the data you want to import.
- How to kick off an import activity.
- How to check the import results to know if the import went well.

Related Topics

- How do I import data?
- Create Import Mappings

6 Manage Import Objects

How do I manage import objects?

Import Objects correlate with the tables in Oracle Applications. Understand import objects and their attributes to manage the data that you want to import. Objects for which you don't have license or access won't show up in the UI.

Import Object Details

Click **Tools** > **Import Management** > **Import Objects**. To see the details of an import object, select it on the Import Object Details page. Here are the details that you see about each importable object.

Column	Description
Display Name	The object as it's called in the User Interface.
Language Independent Code	The internal name of the object.
Parent Object	The parent object of the selected object. If there are multiple parents for an object, they're shown separated by comma.
View Hierarchy	Clicking on the View Hierarchy icon shows the hierarchy between the parent and child objects in a graphical format.
User Key	The attribute or the group of attributes that's used to uniquely identify a record.
Required Attributes	The attribute or the group of attributes for which values are required to create a record. These can't be NULL when updating a record.
Description	A short description of the object.
Download	Link to download the import object template files for each object and its child objects.

Target Attributes

Here are the details that you see for each target attribute.

Column	Description
Display Name	Name of the target attribute in the User Interface.
Attribute Name	Internal or field name of the attribute.

Column	Description
Required	Indicates whether the attribute is mandatory or not.
Default Value	The default value for the attribute, if any.
Type	Data type of the target attribute.
Length	Maximum allowed length for the target attribute values.
Description	A short description of the target attribute.

Related Topics

- Define Objects

Use Import Object Templates to Import Data

You can download an import object template for an object, such as account, and use it as a source file to import data. Templates make it easy for you to use the automapping feature.

For automapping to work, the column headers in the source file must match the names of the columns (attributes) of the objects imported. The column headers shown in the first row of the downloadable templates are the same as the column names of the corresponding objects. Therefore, building source files from the templates allows the automapping process.

For example, if your source file has a column "URL" then it's mapped to the Account URL column. However if your source file's column header is "Website", then automapping fails and you should map manually.

Download the Import Object Templates

To download an import object template:

1. Click **Tools** > **Import Management** > **Import Objects**.
2. On the **Manage Import Objects** page, click the **Download** icon for the object, such as account, for which you want to download the template.

The next section explains the procedure to update the template to import data.

Populate the Import Object Templates

Extract the contents of the ZIP file to a folder. The extracted folder contains the template text files for each of the parent and child objects. The readme text file within the folder contains instructions on how to use the template files to create source file for importing data. Here are the steps to import data using the downloaded template:

1. Open the CSV template file for the object you want to import.

The file for each object contains two rows. The first row contains all the column names in a format that's compatible with the automatic mapping functionality. The second row contains the display names as shown on the import mapping user interface.

2. Before populating the CSV template file with the data to be imported, delete the display name values in the second row, and populate the columns with the data to import.
3. Use the updated file as the source when you're creating an import activity on the import user interface. For more details on the import process, see the topic Import Data in the related links section.

The automatic mapping functionality maps all the columns automatically. You can see both the mapped column names and the corresponding column names in your language on the Map Fields page.

For more information on how to import your data, see the object-specific import topics in the chapter Import Your Data. These topics are titled Import Your <Object-Name> Data. They provide the following information about importing data:

- How to map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
- Required attributes and validations for the object.
- How to create the source CSV file with the data you want to import.
- How to kick off an import activity.
- How to check the import results to know if the import went well.

Related Topics

- How do I import data?

Define Objects

Using Application Composer, modify an application's object model so that you can track and store any additional data you might need. For example, add new fields to an existing object (standard objects), or create entirely new objects (custom objects).

Standard objects are objects that are delivered with an application, and made available to Application Composer for application changes. Custom objects are objects that you create using Application Composer. You can create either top-level objects (objects without a parent) or child objects (objects created in the context of a parent).

Read this topic to learn about these tasks:

- Browsing the object tree
- Creating a custom object
- Deleting a custom object
- Using the Object Overview page
- Editing an object's attributes
- Selecting the display icon for the object's set of UI pages
- Viewing child and related objects

Use Application Composer's Object Tree

Access Application Composer from the Navigator menu. The first view of Application Composer is the main Overview page, which is the entry point into all your application change options.

On the main Overview page, the regional pane at left displays the object tree, which lets you browse an application's existing object configuration in a tree format. The object tree reflects the latest configuration of the application: both standard objects as well as custom objects.

To use the object tree:

1. Select **Application Composer** from the Navigator menu, under the Configuration category.
2. For each object node, whether standard or custom, expand it further to view and edit object details.

   For example, look at object details such as fields and UI pages where the object is exposed.

   > **Note:** At the top of the object tree, you can also click the New icon to create a new custom object.

   For both standard and custom objects, you can view and edit the following details:

   - Fields

     Add new fields to an object.
   - Pages

     Modify the pages on which an object appears.
   - Actions and links

     Add actions or links to pages.
   - Server scripts

     Write application logic that controls the behavior of an object's records.

   For custom objects, you can also view and edit details to security. For example, you can implement functional and data-level security for an object and its records.

Create a Custom Object

Create a custom object if you want to track data about an object that's not already delivered with your cloud service. After you create the object, you then add custom fields and design user interface pages where your users can enter object records. There's no fixed limit on the number of custom objects that you can create.

To create a custom object:

1. On the main Overview page of Application Composer, select the **Custom Objects** node in the object tree, or click the icon in the local area of the main Overview page.
2. On the resulting summary table, click the New icon, or at the top of the object tree, click the New icon.

3. Complete the primary identifying attributes for a custom object:

    a. **Display Label**

       An object's display label is the user-friendly label for an object, and also becomes the default page title for the object's work area.

    b. **Plural Label**

       The plural label is used as the title of the object's work area. The label is also used as the search string in the regional search, as well as in the saved search on the object's runtime overview page.

    c. **Record Name Label**

       Use the **Record Name Label** field to specify the display label for the object's RecordName attribute. The RecordName attribute stores the user-entered "name" of the record. For example, if you're creating a custom object, Book. In the **Record Name Label** field for this object, you would enter something like "ISBN Number." At runtime, for each new record, your users would use the **ISBN Number** field to enter the book's International Standard Book Number (ISBN), which uniquely identifies books published internationally.

       Typically, this field is the object's primary user-recognizable identifier that runtime users drill down on, from the landing page to the detail page. For example, at runtime, your users would click any ISBN to drill down to review details about the book, such as book title and author.

    d. **Record Name Data Type**

       Select either Text or Automatically Generated Sequence.

       For record names of Text data type, the maximum length that users can enter is 32 characters. For record names of Automatically Generated Sequence data type, the sequence number is based on a display format which is up to 28 characters and has at least one number token: {0}.

    e. Select the **Prevent duplicate values?** check box to prevent users from entering records with duplicate names.

        i. If the **Prevent duplicate values?** check box is selected, then the **Treat "ABC" and "Abc" as distinct values** check box is enabled.

           Select this check box if you want the assessment for duplicate records to be case sensitive.

    f. **Object Name**

       The object name is the internal name for the object.

       > **Note:** You can use a custom object's internal name only once across the mainline code and all existing sandboxes. If you previously used an object's internal name in a sandbox, you can reuse that same internal name, but you must first you delete all other sandboxes where the internal name was previously used. You can use a custom object's display name as many times as you want across sandboxes. The restriction applies only to the internal name.

    g. **Description**

4. Click OK.

   Once your custom object is created, you must add fields and then create the UI pages where your users can create actual records. See Define Fields and Create a Set of Application Pages for Custom Objects.

Tip: To create a custom child object, click the Create Child Object button from the parent object's Object Overview page. See the next section in this topic. Once created, a child object can't be changed to a parent object. Similarly, a parent object can't be changed to a child object. Child objects are discussed below.

Delete a Custom Object

Application Composer doesn't support the deletion of either standard or custom objects. If you no longer need an object that was already published to the mainline metadata, optionally enter a note in the description that the object is no longer used.

Use the Object Overview Page

The Object Overview page provides a high-level overview of a standard or custom object. The Object Overview page displays the primary attributes for an object, plus a list of child objects and related objects, if any.

To access the Object Overview page:

1. On the main Overview page, select the object in the object tree or select the **Standard Objects** or **Custom Objects** node in the object tree, or the icon in the local area of the main Overview page.
2. Select the object from the resulting summary table, and click the **Edit** icon.

From the Object Overview page, you can:

- Edit the object's primary attributes, described in the previous section. For example, change the Display Label or Record Name Label.
- Change the display icon for the object.

  This process is described as follows:
- View the parent child relationships that were created for this object.

  You can also create new child objects from this page, which implicitly creates a new parent child relationship.
- View the non-parent child relationships that were created for this object.

Edit an Object's Attributes

After an object has been created, you can edit its attributes from its Object Overview page.

To edit an object's attributes:

1. Access the Object Overview page for the object, as described earlier.
2. On the Object Overview page, click **Edit**:
   - Change the object's primary attributes, such as display label, description, and record name, at any time.
   - You can't change the Object Name and API Name after the object has been created.

     A custom object's API name is automatically derived using the logical name followed by _c. You use the API name in Groovy expressions that you build with the expression builder, when writing business logic for the object.

Select the Display Icon for Objects

From the Object Overview page, you can select the display icon to use for the object's UI pages. You can select the display icon for custom objects (although a default icon is provided), and you can change the icon for standard objects.

The icon you select determines which icon and theme display to your end users in a variety of locations, such as on the Navigator, subtabs, mobile pages, and the springboard strip on application pages.

> **Tip:** The icon selected for standard objects is inherited across your applications. For example, if you change the display icon for the Opportunity object, then all UI pages are automatically updated to the new icon. This includes even custom subtabs that you added using Application Composer.

To select the icon:

1. Click the object's node in the object tree to view the object's Overview page.
2. On the Overview page, set the icon for the object in the Display Icon region.

View Child and Related Objects

The Object Overview page displays a list of child objects and related objects, if any. You can also create new child objects from this page.

- A child object is an object with a cascade delete relationship to a parent object. This means that if you delete the parent object record, then all its child records are automatically deleted. A child object doesn't exist outside the context of the parent object, and doesn't have its own work area. You can't change a child object to a parent object after the child object has been created.
- Related objects can exist independently of each other, even if one object is deleted. Related objects are connected in a foreign key-based relationship between two top-level objects, not as parent and child. These types of relationships include reference relationships and dynamic choice list relationships.

  Related objects can have either a one-to-many or a many-to-one relationship with the current object. Note that an object can be related to itself to model a hierarchy of the object. In this case, the object itself is displayed on its Object Overview page as a related object. For example, the Department and Sub-department objects would be displayed in this way.

  > **Note:** You don't create these types of relationships from this page. Instead, manage relationships from the Relationships page, which you can access from Application Composer's main Overview page. Or, create a dynamic choice list relationship by creating a dynamic choice list field for an object, which derives its choice list values from another object.

To create a child object for a standard or custom object:

1. Navigate to an object's Object Overview page.
2. Click the **Create Child Object** button. Creating a child object is the same as creating a custom object, except:
   - The current object is automatically displayed as the parent object.
   - Specify the **Child Collection Name** field to specify the internal name for this set of child object records, which can be used later when writing Groovy scripts.

Related Topics

- Application Pages for Custom Objects

7 Import Custom Objects

How do I enable import of custom objects?

This topic describes how to enable the import of custom objects. Before you can import and export data for custom objects created with Application Composer, you must ensure that the required object artifacts have been generated.

Object artifacts are required to register your extensions and make them available for importing. When you publish your sandbox after your configurations, artifacts are automatically generated and the custom objects are available for import and export. With a single publishing, you can generate configurations for CRM, ERP, and SCM cloud applications.

How you Enable Import of Custom Objects

To enable the import of custom object data:

1. Create a sandbox and add configurations to the objects.
2. Publish the sandbox. See *Publish Sandboxes* for more information.
3. Artifact generation is triggered automatically as part of the sandbox publish. Artifacts are generated for objects that are changed inside sandbox only.
4. You can monitor the artifact generation status on the Generate Import and Export Artifacts tab by navigating to **Tools** > **Import Management** > **Import Configuration**. You can perform this only once you're outside the sandbox.

After the artifact is generated, you're ready to import. If some artifacts aren't generated automatically, then you have to manually generate them using the **Generate** button. See *How do I generate artifacts manually?* .

To download the diagnostics log of the artifact generation, click the **Generate** button under the **Diagnostics** tab, and then click the link under the **Attachments** column. Note that you must import the custom child objects only after importing the parent object.

> **Note:** If your custom field is missing from import mapping after generating the artifacts, then enable the profile option ORA_ZCA_OBJECT_METADATA_COMPLETE_GENERATION to 'Yes' from **Setup and Maintenance** > **Manage Administrator Profile Values** . Then generate your artifacts again and turn the profile option back to "No".

You can update the profile option ORA_ZCA_IMPORT_EXPORT_QUEUE_SIZE to specify the size of import and export queues for dynamic queue configurations. The possible values are LOW, MEDIUM, HIGH, and FIXED. After updating the profile option, you must generate the artifacts for the changes to reflect.

If you have configured security in the Application Composer for create, update, or delete scenario, then such validations aren't honored by high-volume imports. Validations are applicable only for low-volume imports.

Relationships Between Custom Objects

Parent object resources expose the child objects of top-level custom objects. For objects to interact with one another, relationships must be created between them. The related objects can be either standard or custom objects. For example, if you want attributes from the Employee object to be available in the Trouble Ticket object workspace, a relationship must be defined between the Employee object and the Trouble Ticket object.

You can use Application Composer to create relationships between objects. Using Application Composer, you can create two types of relationships:

- Parent-child: When you define a parent-child relationship, the link to the child object is included in the parent object description. A child object doesn't have its own workspace, and the child object's records are deleted if the parent object record is deleted.
- Reference: When you define a reference relationship, the primary key of the source object is included as a foreign key in the description of the target object.

Intersection Objects

Use Application Composer to create many-to-many relationships between custom objects. In this case, you create an intersection object that references the source and target objects. For example, consider two object resources, Trouble Ticket and Resource, related by a many-to-many reference relationship, with the Assignment resource as the intersection object. In such a case, the following applies:

- The Assignment resource has Trouble Ticket as the source object and Resources as the target object. The objects Trouble Ticket and Resources have many-to-many relationships.
- The Assignment resource is the child resource of both Trouble Ticket and Resources.

How you Import Record Name Values

By default, the Record Name field is automatically generated and is updated using automatic sequence. The value you provide in the source file is ignored. If automatic record-name generation is disabled in the Application Composer, then you must provide the value in the source file and this value is imported. However, high-volume import doesn't support automatic generation of Record Name field; you must provide the Record Name value in the source file.

Specify the RecordNumber Attribute

When defining your custom object in Application Composer, RecordNumber field is always unique. The import activity uses RecordNumber as the user key to resolve the record in the target database.

When you modify the PUID (**RecordNumber**) make sure you follow by Application Composer guidelines, to prevent recordNumber collisions with the existing database sequence. This is applicable for both high-volume import and import using REST service. For more information on how to prevent conflict in PUID, see the topic Custom Object Public Unique IDs in the related topics section.

Support of Record Name Attribute

You can update custom object records by using the Record Name attribute to identify records. To enable this, you must set the profile option ORA_ZCA_IMPORT_ENABLE_RECORDNAME_SUPPORT to Y. By default this profile option has a value N. If you use the Record Name attribute to update records, the following order of precedence is used to identify the records:

1. ID (PK)
2. RecordNumber (PUID)
3. RecordName (`AlternatePUID`)

However, you can't update the `Recordname` attribute value.

Related Topics

- Publish Sandboxes

Import Custom Object Data

You can import custom object data into Sales and Fusion Service. Before importing custom data, create the parent and child custom objects for the data you want to import.

In this example, we will create a parent object (`CustomOrder`) and a child object (`CustomOrderItem`) with the required fields and then import data for these objects.

Create the Parent and Child Objects

To create parent and child custom objects:

1. Navigate to **Application Composer**.
2. Click the **Custom Objects** icon on the **Overview** screen.
3. Click the **Create New Object** icon to bring up the **Create Custom Object** window. Note that your environment must be in an active sandbox to perform this action.
4. Enter the value `CustomOrder` for Display Label. The other fields are automatically filled, which creates the parent custom object `CustomOrder`.
5. Create the custom fields by clicking the Fields option under the `CustomOrder` object. Enter the display names OrderName and OrderCount for the fields.
6. Click the **CustomOrder** icon on the side pane. On the **Overview** page, click the **Create Child Object** button to create the child object CustomOrderItem.
7. Create the custom fields `ItemName` and `ItemCount`.
8. After creating the custom objects, publish and sign out from the sandbox.

Import Data for Parent Custom Object

To import data for parent custom objects only, follow these steps:

1. Create the CSV file using the following table:

RecordName	OrderName	OrderCount
`CustomOrder1`	01-A1-inventory	2000
`CustomOrder2`	02-B3-inventory	3000

2. Click **Tools** > **Import Management**.
3. On the **Manage Imports** page, click the **Create Import Activity** button to create an import activity InsertCustomObject. For more information about creating an import, see the topic Import Data mentioned in Related Topics section.
4. On the Create Import Activity page, provide the file name InsertCustomObject and select the custom object CustomOrder from the **Object** drop-down list. Browse the CSV file that you created in step 1. Click **Next**.
5. On the mapping page, map the attributes as shown in the following table:

Column Header	Example Value	Attribute Display Name
RecordName	`CustomOrder1`	CustomOrder Name

Column Header	Example Value	Attribute Display Name
OrderName	01-A1-inventory	OrderName
OrderCount	2000	OrderCount

6. Review and activate the import activity.

> **Note:** If there are any mandatory fields in the custom object, then they must be included in the CSV file and a value must be provided for all records when performing an import. The required values must be mapped on the mapping page. In this example, OrderName is a mandatory attribute.

Import Multiple Child Records for an Existing Parent Record

After importing the parent record you can import data for child records associated with the parent record. To import data for multiple child records for an existing parent custom object, follow these steps:

1. Create the CSV file using the following table.

RecordName	CustomOrder_Id_c	ItemName	ItemCount
CustomOrder1_Item1	300100035820958	Electronics	150
CustomOrder1_Item2	300100035820958	Stationery	200
CustomOrder1_Item3	300100035820958	Computer Accessories	500

> **Note:** You can import the custom child of an object using the ParentRecordName attribute also.

2. Click **Tools** > **Import Management**.
3. On the Manage Imports page, click the Create Import Activity button to create an import activity InsertCustomObject. For more information about creating an import, see the topic Import Data mentioned in Related Topics section.
4. On the Create Import Activity page, provide the file name InsertCustomObject and select the custom object CustomOrderItem from the **Object** drop-down list. Browse the CSV file that you created in step 1. Click **Next**.
5. On the mapping page, map the attributes as shown in the following table.

Column Header	Example Value	Attribute Display Name
RecordName	CustomOrder1_Item1	CustomOrderItem Name
CustomOrder_Id_c	300100035820958	CustomOrder_Id_c

Column Header	Example Value	Attribute Display Name
ItemName	Electronics	ItemName
ItemCount	150	ItemCount

6. Review and activate the import activity.

Import Multiple Child Records with Different Parent Records

After importing the parent record you can import data for child records of the parent record. The Parent Record Object Key values will be different depending on which parent record the child records are being imported for. To import data for multiple child records with different parent object records, follow these steps:

1. Create the CSV file using the following table.

RecordName	CustomOrder_Id_c	ItemName	ItemCount
CustomOrder1_Item1	300100035820958	Switches	50
CustomOrder1_Item2	300100035820958	Sockets	100
CustomOrder1_Item3	300100035820958	Regulators	50
CustomOrder2_Item1	300100035820960	Pencils	50
CustomOrder2_Item2	300100035820960	Sharpener	100
CustomOrder2_Item3	300100035820960	Eraser	50

Note: You can import the custom child of an object using the ParentRecordName attribute also.

2. Click **Tools** > **Import Management**.
3. On the Manage Imports page, click the Create Import Activity button to create an import activity InsertCustomObject. For more information about creating an import, see the topic Import Data mentioned in the Related Topics section.
4. On the Create Import Activity page, provide the file name InsertCustomObject and select the custom object CustomOrderItem from the **Object** drop-down list. Browse the CSV file that you created in step 1. Click **Next**.
5. On the mapping page, map the attributes as shown in the following table.

Column Header	Example Value	Attribute Display Name
RecordName	CustomOrder1_Item1	CustomOrderItem Name

Column Header	Example Value	Attribute Display Name
CustomOrder_Id_c	300100035820958	CustomOrder_Id_c
ItemName	Electronics	ItemName
ItemCount	150	ItemCount

6. Review and activate the import activity.

High Volume Import of Custom Objects

You can now use auditing functionality while performing high-volume import of custom objects. You can control base table auditing by setting the profile option ORA_ZCA_IMPORT_ENABLE_AUDIT_HIGHVOLUME to Yes. The default value is No.

1. To enable base table auditing, go to **Setup and Maintenance**.
2. Search for Manage Administrator Profile Values **Profile Option code: ORA_ZCA_IMPORT_ENABLE_AUDIT_HIGHVOLUME**.
3. Set it to Yes, then Save.

Related Topics

- How do I import data?

Update Custom Object Data

This example shows how to update custom object data in Sales and Fusion Service.

Update Only Parent Records

To create the parent and child custom objects, review the topic Import Custom Object Data referenced in the Related Topics section. Perform the following steps to update only the parent records:

1. Create the CSV file based on the following table:

ID	RecordName	OrderName	OrderCount
300100035820958	`CustomOrder1`	01-A1-inventory	90000
300100035820960	`CustomOrder2`	01-A1-inventory	70000

2. Click **Tools** > **Import Management**.
3. On the Manage Imports page, click the Create Import Activity button to create an import activity UpdateCustomObject. For more information about creating an import, see the topic Import Data mentioned in the Related Topics section.
4. On the Create Import Activity page, provide the file name UpdateCustomObject and select the custom object CustomOrder from the **Object** drop-down list. Browse the CSV file that you created in step 1. Click **Next**.
5. On the mapping page, map the attributes as shown in the following table.

Column Header	Example Value	Attribute Display Name
ID	300100035820958	Record ID
RecordName	`CustomOrder1`	CustomOrder Name
`OrderName`	01-A1-inventory	OrderName
OrderCount	90000	OrderCount

6. Review and activate the import activity.

> **Note:** The Parent Record Object Key should be taken from the log file generated by the parent insert import job.

Update Only Child Records

To create the parent and child custom objects, review the topic Import Custom Object Data referenced in the Related Topics section. Perform the following steps to update only the child records.

1. Create the CSV file using the following table.

ID	RecordName	ItemName	ItemCount
300100035821118	`CustomOrder1_Item1`	Switches	2500
300100035821120	CustomOrder1_Item2	Sockets	1000

2. Click **Tools** > **Import Management**.
3. On the Manage Imports page, click the **Create Import Activity** button to create an import activity UpdateCustomObject.
4. On the Create Import Activity page, provide the file name UpdateCustomObject and select the custom object CustomOrderItem from the **Object** drop-down list. Browse the CSV file that you created in step 1. Click **Next**.

5. On the mapping page, map the attributes as shown in the following table.

Column Header	Example Value	Attribute Display Name
ID	300100035821118	Record ID
RecordName	CustomOrder1_Item1	CustomOrder Name
`ItemName`	Switches	`ItemName`
ItemCount	2500	ItemCount

6. Review and activate the import activity.

Related Topics

Delete Custom Object Data

This example shows how to delete custom object data in Sales and Fusion Service.

Perform the following steps to delete the custom object records:

1. Create the CSV file based on the following table:

ID	RecordName
300100035820958	`CustomOrder1`
300100035820960	`CustomOrder2`

   Note that you can delete a record using the Public Unique Identifier (PUID) key also.
2. Click **Tools** > **Import Management**.
3. On the **Manage Imports** page, click the **Create Import Activity** button to start creating an import activity.
4. On the **Create Import Activity** page, enter the import activity name and select the custom object from the **Object** drop-down list. Browse the CSV file that you created in step 1. In the **Advanced Options** section, select the Import Mode as 'Delete records'. Click **Next**.
5. On the Map Fields page, map the attributes as shown in the following table.

Column Header	Example Value	Attribute Display Name
ID	300100035820958	Record ID

Column Header	Example Value	Attribute Display Name
RecordName	`CustomOrder1`	`CustomOrder Name`

6. Review and submit the import activity.

8 Import Your Data

Import Account Data

How do I import account data?

You can use Import Management to create, update, or delete your account data.

You can import account records using these steps:

1. Map your source account data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the account data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import account data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

Note: You can enable automatic territory-based assignment after sales accounts are imported. You can enable this feature by turning the profile option ZCA_BATCH_ASSIGN_ON_BULK_IMPORT ON. If the profile option is disabled, then you must manually run a batch assignment or assign each sales account individually.

To better manage your account information, the account object has the following child objects:

- Address
- Classification
- Relationship
- Sales Team Member

Note: You can't set an attribute value to NULL in high-volume import (import management with the option **Enable High-Volume Import** selected). However, when updating a record, you can change an attribute value from NOT NULL to NULL

If you're importing account records with attributes specific to the parent account object or along with single child record details (like phone, email, address, and so on), then you can include the child record details in the same .csv file for account object. However, if you're importing multiple records of any child object, then you must create multiple .csv files to import- one for each child which has multiple records that you're importing. For example, if you're importing 5 emails, 5 phones, and 5 addresses for an account, then you must create three import files - one for Account object, one for Contact Point object (phone and email), and one for Address object. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Note: High-volume import for accounts now supports hierarchy management and generation.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data. For example, when using source system reference information to identify your account records, the source system of the account object should be enabled for parties using the Manage Trading Community Source Systems task.
- You have all parent records in place before importing child records. For example, when importing the address of an account, ensure the account exists.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For account object, the attribute is PartyNumber and shows up in the UI as Party Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new accounts or are updating accounts that have source system reference data, then provide the source system and source system reference values. For account object, these are SourceSystem and SourceSystemReferenceValue and show up as Party Source System and Party Source System Reference Value in the UI.

Review Required Attributes and Validations for Account Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for account records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Account Record	Updating an Existing Account Record	Deleting an Existing Account Record
SourceSystem	The source system for the sales account.	Know the source system.	Conditionally Required	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Account Record	Updating an Existing Account Record	Deleting an Existing Account Record
		To view source systems, use the Manage Trading Community Source System task.	To identify an account record, use one of these: • SourceSystem and SourceSystemRefe • PartyNumber	To identify an account record, use one of these: • SourceSystem and SourceSystemRefe • PartyNumber	To identify an account record, use one of these: • SourceSystem and SourceSystemReferenceValu • PartyNumber
SourceSystemReferenc	The reference number or text representing the source system unique ID for the party (account or contact) to which the sales profile belongs.	Know the source system reference value. To view the source systems reference, use the Manage Trading Community Source System task.	Conditionally Required To identify an account record, use one of these: • SourceSystem and SourceSystemRefe • PartyNumber	Conditionally Required To identify an account record, use one of these: • SourceSystem and SourceSystemRefe • PartyNumber	Conditionally Required To identify an account record, use one of these: • SourceSystem and SourceSystemReferenceValu • PartyNumber
PartyNumber	The public unique identifier of the party.	The party must exist. You get a list of all party IDs and party numbers by exporting the Party object.	Conditionally Required	Conditionally Required	Conditionally Required
OrganizationName	The name of the party of the Organization party type.	Organization names are listed in the Resource Directory.	Required	Conditionally Required	Conditionally Required
OwnerPartyId	The identifier of the account owner.	This attribute is required only in import management, but optional in high-volume import.	Required	Not Required	Not Required

Note: When deleting or updating accounts, you must ensure that the account related to the party number provided has the Sales Account usage. If you provide the party number of an account that doesn't have the Sales Account usage, then the relationships for that account are also deleted. For example, if you provide the party number ORA17292 that doesn't have a Sales Account usage, then the related partners, contacts, and so on are also deleted.

For the extension child objects of account, RecordName field isn't unique. Hence you can't update the records only by passing RecordName.

You can use the profile option ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE to control how address types are entered. By default this profile option is set to Yes, so you can enter multiple address types, during high-volume import of Account, Contact, and Household objects . You can disable this profile option to improve the import performance. When you set this profile option to No, you can enter only a single address type.

> **Note:** When importing accounts or legal entities, you can retrieve duplicates using the Customer Data Management Duplicates LOV only if you have licensed the data quality functionality. Once licensed, you must rebuild the keys for your matching configuration using the Manage Enterprise Data Quality Matching Configurations task. After the keys are rebuilt, the matching functionality uses the settings in the match configuration to identify duplicates.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects** to see all the attributes of the account object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Account** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Providing the ZIP and Country Code values in the import CSV file won't automatically populate the State/County/City fields. Values for these fields should be separately provided in the import file.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the account information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Account from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

> **Note:** After importing your data successfully, you need to run a couple of post processing jobs for duplicate identification, duplicate resolution, and account assignment. For more information on import management post processing jobs, see the topic *Import Management Post Processing Jobs*

When importing accounts you can now load the account hierarchy data. Use the following attributes to import accounts:

- ParentAccountPartyId
- ParentAccountPartyNumber
- ParentAccountSourceSystem
- ParentAccountSourceSystemReferenceValue

You can load account hierarchy data. To load the account hierarchy data:

1. Load the account data without providing values for the parent attributes mentioned above.
2. Load the account hierarchy using the Hierarchy and Hierarchy Member import objects. For more information, see *How do I import hierarchy data?* and *How do I import hierarchy member data?*

Delete an Account

Related Topics

- How do I import data?
- Import Your Address Data
- How do I import contact point data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How You Enable Automatic Account Assignment

Example of Adding or Updating Primary Contact

You can add or update the primary contact of an account using import management. Before adding or updating the primary account, ensure that the contact exists.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can add or update a primary contact by submitting any one or more of the unique identifiers.

List of Account Identifiers:

- PartyId
- PartyNumber
- SourceSystem and SourceSystemReferenceValue

List of Contact Identifiers:

- PrimaryContactPartyId
- PrimaryContactPartyNumber
- PrimaryContactSourceSystem and PrimaryContactSourceSystemReferenceValue

To add or update the primary contact of an account, you must create a source file (CSV) and import it using import management. Below table lists the attributes using Party ID and Primary Contact Party ID as identifier:

Attribute Name	Value
PartyId	300100545540269
PrimaryContactPartyId	300100545059765

Create the Import Activity

After you have the CSV file ready, create an import activity to import the account information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Account from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How You Enable Automatic Account Assignment

Example of Changing or Assigning Owner of an Account

You can change or assign the owner of an account using import management. Before changing or assigning the owner, ensure that the account exists and the owner is an active or valid resource.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can change or assign the owner of an account by submitting any one or more of the unique identifiers.

List of Account Identifiers:

- PartyId
- PartyNumber
- SourceSystem and SourceSystemReferenceValue

List of Owner Identifiers:

- OwnerPartyId
- OwnerPartyNumber
- OwnerSourceSystem and OwnerSourceSystemReferenceValue

To change owner of an account, you must create a source file (CSV) and import it using import management. Below table lists the attributes using Party ID and Owner Party ID as identifier:

Attribute Name	Value
PartyId	300100545540596
OwnerPartyId	300100545540269

Create the Import Activity

After you have the CSV file ready, create an import activity to import the account information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How You Enable Automatic Account Assignment

How do I import account contact data?

You can use Import Management to create update, or delete Account Contact records as child under Account object. This automatically also creates relationship record, associating referenced contact and account which can be viewed under relationship child object.

To import Account Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Account Contact data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent or referenced records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can import account contact object by submitting any one or more of the conditionally required attributes. You can provide a combination of Account and Contact identifiers for create and update. Alternatively for Update scenario, you can provide the primary unique identifier or one of the relationship identifiers.

List of Contact Identifiers:

- ContactPartyId
- ContactPartyNumber
- ContactSourceSystem and ContactSourceSystemReferenceValue

List of Account Identifiers:

- AccountPartyId
- AccountPartyNumber
- AccountSourceSystem and AccountSourceSystemReferenceValue

List of Relationship Identifier:

- RelationshipRecId
- RelationshipSourceSystem and RelationshipSourceSystemReferenceValue

Primary unique identifier: AccountContactId is the primary unique identifier which is auto generated. You can use this identifier to update account contact record.

Required Attributes and Validations for Account Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Account Contact records, required attributes for updating Account Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Account Contact import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Account Contact Record	Updating an Existing Account Contact Record
AccountContactId	The unique identifier of the account contact which is system generated.	Should be a valid value which exists in the application	Not Applicable	Conditionally Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Account Contact Record	Updating an Existing Account Contact Record
RelationshipRecId	Alternate unique identifier for the account contact which is system generated.	Should be a valid value which exists in the application	Not Applicable	Conditionally required
ContactPartyId	The primary key identifier of the subject in this relationship. Either one of ContactPartyId, ContactPartyNumber, or a combination of ContactSourceSystem and ContactSourceSystemRefere is used to identify the subject party of the relationship.	The contact must exist	Conditionally Required Provide a value along with Account identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Account identifier to uniquely identify account contact record for update
ContactPartyNumber	The public key identifier for the Contact party of the relationship. Either one of ContactPartyId, ContactPartyNumber, or a combination of ContactSourceSystem and ContactSourceSystemRefere is used to identify the Contact party of the relationship.	The contact must exist	Conditionally Required Provide a value along with Account identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Account identifier to uniquely identify account contact record for update
ContactSourceSystem	The name of external source system for the subject party in the relationship, which are defined by an administrator as part of system setup. To be used in combination of ContactSourceSystemRefere	The value for this attribute should be predefined using the setup task Manage Trading Community Source Systems	Conditionally Required Provide a value along with ContactSourceSystemRefere for uniquely identifying a contact record Additionally, provide an Account Identifier	Conditionally Required Provide a value along with ContactSourceSystemReferenceValue for uniquely identifying a contact record Additionally, provide an Account Identifier
ContactSourceSystemRefere	The identifier for the subject party in the relationship from external source system. To be used in combination with ContactSourceSystem.	The Source System Reference value should exists for the Contact	Conditionally Required Provide a value along with ContactSourceSystem for uniquely identifying a contact record Additionally, provide an account identifier	Conditionally Required Provide a value along with ContactSourceSystem for uniquely identifying a contact record Additionally, provide an account identifier
AccountPartyId	The primary key identifier of the object in this relationship. Either one of AccountPartyId, AccountPartyNumber, or combination of AccountSourceSystem and AccountSourceSystemRefere is used to identify the	The Source System Reference value should exists for the Contact	Conditionally Required Provide a value along with Contact identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Contact identifier to uniquely identify account contact record for update

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Account Contact Record	Updating an Existing Account Contact Record
	Account party of the relationship.			
AccountPartyNumber	The public unique identification number for the object party of the relationship Either one of AccountPartyId, AccountPartyNumber or combination of AccountSourceSystem and AccountSourceSystemRefere is used to identify the Account party of the relationship.	No Validation	Conditionally Required Provide a value along with Contact identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Contact identifier to uniquely identify account contact record for update
AccountSourceSystem	The name of external source system for the subject party in the relationship, which are defined by an administrator as part of system setup. To be used in combination with AccountSourceSystemRefere	The value for this attribute should be predefined using the setup task Manage Trading Community Source Systems	Conditionally Required Provide a value along with AccountSourceSystemRefere for uniquely identifying an account record Additionally, provide a contact identifier	Conditionally Required Provide a value along with AccountSourceSystemReferenceValue for uniquely identifying an account record Additionally, provide a contact identifier
AccountSourceSystemRefere	The name of external source system for the subject party in the relationship, which are defined by an administrator as part of system setup. To be used in combination with AccountSourceSystem.	The Source System Reference value should exist for the Account	Conditionally Required Provide a value along with AccountSourceSystem for uniquely identifying an account record Additionally, provide a contact identifier	Conditionally Required Provide a value along with AccountSourceSystem for uniquely identifying an account record Additionally, provide a contact identifier
RelationshipSourceSystem	The name of external source system for the relationship record, which are defined by an administrator as part of system setup. To be used in combination with RelationshipSourceSystemR	The value for this attribute should be predefined using the setup task Manage Trading Community Source Systems	Optionally Required	Conditionally Required for uniquely identifying an account contact record Additionally, provide a value for RelationshipSourceSystemReferenceVa
RelationshipSourceSystemR	The name of external source system for the relationship record, which are defined by an administrator as part of system setup. To be used in combination with RelationshipSourceSystem.	The Source System Reference value should exists for the Contact.	Optionally Required	Conditionally Required for uniquely identifying an account contact record Additionally provide a value for RelationshipSourceSystem

You can view the Account Contact object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Account Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Account Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Action Data

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

You can import action records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the action data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import action data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the action import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

To better manage your action information, the action object has the following child objects:

- Action Attribute
- Action Condition

If you want to import only a few records, then you can create a single CSV file for all action attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the action child objects. Note that you must have imported the CSV file for action object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID

attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new actions or are updating actions that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Action Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for action records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Action record	Updating an Existing Action record
Action	The name of the action that's associated associated with an action plan template or action plan instance.	None	Required	Not required
Action Id	The unique Id of the existing Action record in the Oracle Fusion destination table.	Identify the Action ID value by exporting the Action object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Required	A value is required if you're updating an existing Action and you're not providing the Action Number. The Action ID is autogenerated in Oracle Fusion applications, if you don't specify a value.
ActionNumber	The unique ID for the existing Action record in the Oracle Fusion destination table.	None	Optional	A value is required if you're updating an existing Action and you're not providing the Action Id.
Parent Entity Name	The entity name of the object for which the action can be used in an action plan.	None If providing a value, it must be ServiceRequest.	Conditionally required A value is required only when you're inserting a parent entity name. However, a value isn't required when you delete or update an existing parent entity name.	Conditionally required A value is required only when you're inserting a parent entity name. However, a value isn't required when you delete or update an existing parent entity name.
Duration	The estimated time to complete the action.	None	Required	Required
Duration Unit	The unit of measurement for lead time.	None If you intend to specify a value, select a value from	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Action record	Updating an Existing Action record
		the list of valid values in the lookup type ORA_SVC_AP_LEAD_TIME_UNIT.		
Object Entity Name	Entity name of the object on which the action is based.	None	Conditionally required A value is required only when you're inserting an object entity name. However, a value isn't required when you delete or update an existing object entity name.	Conditionally required A value is required only when you're inserting an object entity name. However, a value isn't required when you delete or update an existing object entity name.
Original System Reference	Specifies the original system reference if this record was imported.	Identify the original system and system reference values from your source system that were imported when you imported the resource.	Optional	Optional
Object Entity Type	The entity type of the object on which the action is based.	The valid values are ServiceRequest, Task, and Appointment.	Required	Not required A value is required only when you're inserting an object entity type. However, a value isn't required when you delete or update an existing object entity type.
Visibility	Indicates the visibility level of the action.	If you intend to specify a value, select a value from the list of valid values in the lookup type ORA_SVC_AP_VISIBILITY_CD.	Required	Not required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the action object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Action object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the action information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Action**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Action** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.

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

6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Action Attribute Data

You can use the import functionality to create, update, or delete action attribute data.

You can import action attribute records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the action condition data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import action attribute data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the action import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

If you want to import only a few records, then you can create a single CSV file for all action conditions. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the action child objects. Note that you must have imported the CSV file for action object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new actions or are updating actions that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Action Attribute Object

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

This table lists the required attributes for action attribute records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Action Attribute record	Updating an Existing Action Attribute record
Action Attribute Id	The unique Id of the existing Action Attribute record in the Oracle Fusion destination table.	Identify the Action Attribute ID value by exporting the Action object by navigating to **Tools** > **Export Management** > **Create Export Activity**.	Not required	A value is required if you're updating an existing Action attribute and you're not providing the Action source system (original system)
Action Code	Indicates the operation to be performed on a row, such as insert, update, and so on	If a value isn't provided, records are matched to determine if a record is updated (if it already exists) or inserted (if it doesn't exist).	Not required	A value is required, if you're deleting an action attribute.
ActionId	Specifies the foreign key that references the Action ID to which the action is assigned.	Identify the Action ID value by exporting the Action object by navigating to **Tools** > **Export Management** > **Create Export Activity**.	Not required	A value is required, if you're updating an existing Action Id and you're not providing the Action Id source system code and reference Action OSR.
ActionOSR	Specifies the action original system reference, if the record was imported.	Identify the original system and system reference values from your source system which were imported when you imported the resource.	Required	A value is required if you're updating an existing Action Id record and you're not providing the record's unique ID (`ActionId`)
AttributeName	Attribute from the entity object of the associated action.	None	Not Required	Not Required
AttributeValue	The value to be set on the Action attribute.	None	Not Required	Not Required
AttributeValueContextCd	The context of how the attribute value should be interpreted (for example, as an attribute of the parent action's object, an attribute of the parent action, or a custom value).	The valid values provided by the lookup type ORA_ SVC_AP_CONTEXT_CD.	Required	Not required
Deleted	Indicates whether the service request is to be deleted. If the value is Y, then the service request is deleted. The default value is N.	None	Not required	Not required
ErrorMessage	This column displays the error messages, if any.	None	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Action Attribute record	Updating an Existing Action Attribute record
ErrorMessage	This column displays the error messages, if any.	None	Not required	Not required
InternalOvn	This is meant for internal use.	None	Not required	Not required
JobDefinitionName	Indicates the name of the job that created or last updated the row.	None	Not required	Not required
JobDefinitionPackage	Indicates the package name of the job that created or last updated the row.	None	Not required	Not required
UsageCd	Indicates when the attribute is to be used.	The valid value is ORA_ SVC_CREATE.	Required	Not required

You can view the Action 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Action Attribute object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the action attribute information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click Create Import Activity in the Manage Imports page.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Action Attribute** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.

7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- Import Your Action Data
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Action Condition Data

You can use the import functionality to create, update, or delete your action condition data.

You can import action condition records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the action condition data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import action condition data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the action import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

If you want to import only a few records, then you can create a single CSV file for all action conditions. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the action child objects. Note that you must have imported the CSV file for action object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

The preferred option to uniquely identify an object record is through the Internal ID.

If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Action Condition Object, the attributes are Action ConditionId and ActionId:

Required Attributes and Validations for Action Condition Object

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

This table lists the required attributes for action condition records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Action Condition record	Updating an Existing Action Condition record
ActionCode	Indicates the operation to be performed on a row, such as insert, update, and so on	If a value isn't provided, records are matched to determine if a record is updated (if it already exists) or inserted (if it doesn't exist).	Not required	A value is required, if you're deleting an action condition.
Action ConditionId	The unique Id of the existing Action Condition record in the Oracle Fusion destination table.	Identify the Action Condition ID value by exporting the Action object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Not required	A value is required if you're updating an existing Action Condition attribute and you're not providing the Action source system (original system)
Action Id	Specifies the foreign key that references the Action ID to which the action is assigned.	Identify the Action ID value by exporting the Action object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Not required	A value is required, if you're updating an existing Action Id and you're not providing the Action Id source system code and reference Action OSR.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Action Condition record	Updating an Existing Action Condition record
ActionStatus	Indicates the status to set an action if the condition is met.	Valid values provided by the lookup type ORA_SVC_AP_STATUS_CD.	Required	Not required
ActionNumber	Specifies the action original system reference, if the record was imported.	Identify the original system and system reference values from your source system which were imported when you imported the resource.	Required	A value is required only if you're not specifying the Action ID.

You can view the Action Condition 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Action Condition object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the action condition information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click Create Import Activity in the Manage Imports page.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Action Condition** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- Import Your Action Data
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Action Plan Data

You can use Import Management to create or update Action Plan records.

To import Action Plan records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Action Plan data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID

attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plans or are updating action plans that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Action Plan Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Action Plan records, required attributes for updating Action Plan records, prerequisite setup tasks for the attributes, and specific validations, if any, for Action Plan import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Action Plan Record	Updating an Existing Action Plan Record
ActionPlanId	The unique identifier of the action plan.	A valid primary key for the action plan record in the destination system is required. Either the ActionPlanNumber or the ActionPlanId is required. If both are present, then the ActionPlanId is preferred.	Not Required Auto-generated in the destination system	Optional Either the ActionPlanNumber or the ActionPlanId is required to update the row.
CalendarId	The calendar identifier associated with the action plan.	A valid calendar record in the destination system.	Required	Not Required
ObjectEntityName	The parent entity object name of the action plan.	A valid value from the ORA_SVC_AP_OBJ_ENTITY_NAME lookup in the destination system.	Required	Not Required
ObjectId	The object identifier of the action plan.	A valid primary key for the parent record in the destination system.	Required	Not Required
StatusCd	The status of the action plan.	A valid value from the ORA_SVC_AP_PROCESS_CD lookup in the destination system.	Optional If no value is passed, then the default value ORA_SVC_CREATE is used.	Optional
TemplateNumber	The reference number of the action plan template.	A valid PUID for action plan template row in the destination system. It is optional if the action plan is created without an action plan template.	Optional Required only when there is a Template ID for the action plan in the source system.	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Action Plan Record	Updating an Existing Action Plan Record
ActionPlanNumber	The reference number of the action plan.	A valid PUID for the action plan row in the destination system.	Optional The PUID can be provided if it needs to be maintained between the source and destination systems.	Required

You can view the Action Plan 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Action Plan** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Action Plan**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Action Plan from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Action Plan**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Action Plan Action Data

You can use Import Management to create or update Action Plan Action records.

To import Action Plan Action records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Action Plan Action data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plan actions or are updating action plan actions that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Action Plan Action Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Action Plan Action records, required attributes for updating Action Plan Action records, prerequisite setup tasks for the attributes, and specific validations, if any, for Action Plan Action import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Action Plan Action Record	Updating an Existing Action Plan Action Record
SkipFlag	Contains the values, Y or N. If Y is used, then the action for the action plan is skipped. If N is used, then the action for the action plan isn't skipped.	The default value is 'N'.	Optional	Optional
TemplateNumber	The reference number of the action plan template.	A valid PUID for action plan template row in the destination system. It is optional if the action plan is created without an action plan template.	Optional Required only when there is a Template ID for the action plan action in the source system.	Not Required
ActionId	The unique identifier of the action.	A valid action Id in the destination system.	Optional	Not Required
ActionNumber	The reference number of the action.	A valid PUID action value in the destination system. Either the ActionId or the ActionNumber is required. If both are present, then the ActionId is preferred.	Required Either the ActionId or the ActionNumber is required to create the action row in the destination system.	Not Required
ActionPlanActionId	The action identifier of the action plan.	A valid primary key for the action plan action record in the destination system is required. Either the ActionPlanActionNumber or the ActionPlanActionId is required. If both are present, then the ActionPlanActionId is preferred.	Not Required	Optional Either the ActionPlanNumber or the ActionPlanId is required to update the row.
DeletedFlag	Contains the values, Yes or No. If Yes is used, then the action in the action plan is deleted. If No is used, then the action in the action plan isn't deleted.	A valid value from the YES_ NO lookup.	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Action Plan Action Record	Updating an Existing Action Plan Action Record
MandatoryFlag	Contains the values, Yes or No. If Yes is used, then the action in the action plan is mandatory. If No is used, then the action in the action plan isn't mandatory.	A valid value from the YES_ NO lookup.	Optional	Optional
ActionPlanNumber	The reference number of the action plan.	A valid PUID for the action plan row in the destination system.	Required Either the ActionPlanId or the ActionPlanNumber is required to create the action row in the destination system.	Not Required
ActionPlanId	The unique identifier of the action plan.	A valid primary key for the action plan record in the destination system is required. Either the ActionPlanNumber or the ActionPlanId is required. If both are present, then the ActionPlanId is preferred.	Optional	Not Required
ActionPlanActionNumber	The reference number of the action plan action object.	A valid action plan action PUID in the destination system.	Optional	Required

You can view the Action Plan Action 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Action Plan Action** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Action Plan Action**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Action Plan Action from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Action Plan Action**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Action Plan Action Relation Data

You can use Import Management to create or update Action Plan Action Relation records.

To import Action Plan Action Relation records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plan action relations or are updating action plan action relations that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Action Plan Action Relation Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Action Plan Action Relation records, required attributes for updating Action Plan Action Relation records, prerequisite setup tasks for the attributes, and specific validations, if any, for Action Plan Action Relation import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Action Plan Action Relation Record	Updating an Existing Action Plan Action Relation Record
DeletedFlag	Contains the values, Yes or No. If Yes is used, then the dependency record is deleted. If No is used, then the then the dependency record isn't deleted.	A valid value from the YES_ NO lookup.	Optional	Optional
RelationId	The relation identifier between actions in an action plan.	A valid primary key for the action plan action relation record in the destination system is required.	Not Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Action Plan Action Relation Record	Updating an Existing Action Plan Action Relation Record
DepActionPlanActionNumbe	The relation identifier between action plan action rows for an action plan.	A valid action plan action PUID in the destination system is required. The combination of ActionPlanActionNumber and DepActionPlanActionNumbe should be unique for a Action Plan.	Optional A Null value is accepted.	Optional A Null value is accepted.
DepActionPlanActionId	The dependent action identifier of an action plan.	A valid primary key for the action plan action record in the destination system is required. Either the DepActionPlanActionId or the DepActionPlanActionNumbe is required. If both are present, then the DepActionPlanActionId is preferred.	Optional A Null value is accepted. Either DepActionPlanActionNumbe or DepActionPlanActionId is required to locate a ActionPlanAction row.	Optional A Null value is accepted.
ActionPlanActionId	The action identifier of the action plan.	A valid primary key for the action plan action record in the destination system is required. Either the ActionPlanActionNumber or the ActionPlanActionId is required. If both are present, then the ActionPlanActionId is preferred.	Optional Either ActionPlanActionNumber or ActionPlanActionId is required to locate a Action Plan Action row.	Optional
ActionPlanActionNumber	The reference number of the action plan action object.	A valid action plan action PUID in the destination system.	Required	Optional

You can view the Action Plan Action Relation 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Action Plan Action Relation** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Action Plan Action Relation**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Action Plan Action Relation from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Action Plan Action Relation**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

How do I import activity data?

You can use Import Management to create, update, or delete your activity data.

You can import activity records using these steps:

1. Map your source activity data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the activity data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import activity data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

To better manage your activity information, the activity object has the following child objects:

- Activity Assignee
- Activity Contact
- Activity Objectives

If you want to import only a few records, then you can create a single CSV file for all activity attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the activity child objects. Note that you must have imported the CSV file for activity object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new activities or are updating activities that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Activity Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for activity records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
AccountId	The internal identifier of the account associated with the activity. Examples of account are: customer, organization, person, partner.	The party must exist. You can determine the PartyId of the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Not Required	If during update, you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.
AccountOrigSystem	The code representing the source system for the account associated with the activity.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch.	Not Required	If during update, you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.
AccountPartyNumber	The public unique identifier of the account associated with the activity.	The party must exist and be a valid party unique identifier	Not Required	If during update, you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.
ActionCode	Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table,	The valid values are INSERT, UPDATE, and DELETE. If not provided, record matching is used to determine whether a record is updated (if it already	Not Required	To delete a record, you must provide the value as DELETE. It is optional to provide values for insert and update as the framework internally decides the action as

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
	DELETE to delete the record.	exists) or inserted (if it doesn't exist).		INSERT if it's a new record or UPDATE if it's an existing record.
ActivityEndDate	The date and time when an appointment ends or the time when a task is completed.	This must be a valid date and should not be less than the ActivityStartDate.	A value is required if you're creating a new activity having ActivityFunctionCode as APPOINTMENT.	Optional
ActivityFunctionCode	Identifies the activity as an appointment or a task. This attribute is for internal use only and the value is set based on the user's navigation to the activity.	Valid values are APPOINTMENT, TASK, and CALLREPORT. Lookup type used is ZMM_ACTIVITY_ FUNCTION_TYPE_CD.	A value is required while creating an activity.	Not Required
ActivityId	The internal identifier of the activity.	Automatically generated by the import process if creating a new activity record.	Not Required	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode)
ActivityNumber	The public unique identifier of the activity. Indicates a default system-generated number for the activity.	If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**. The table ZMM_ACTY_ ACTIVITIES with column ACTIVITY_NUMBER holds the existing value.	Required	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
				(OrigEntityNumber and OrigEntityCode)
ActivityStartDate	The starting date and time of an appointment or a task. The default value for an appointment is null. The default value for a task is the date and time at which the task is created.	If no value is provided, the corresponding value from Activity production table is used.	A value is required if you're creating a new activity having ActivityFunctionCode as APPOINTMENT.	Optional
ActivityTypeCode	The channel through which communication has taken place.	If no value is provided, the corresponding value from Activity production table is used. If the ActivityFunctionCode is 'APPOINTMENT' and the action is 'INSERT' then the default value is set to 'MEETING'.	If no value is provided, the corresponding value is used from the Activity production table. If the ActivityFunctionCode is APPOINTMENT and the action is INSERT, the default value is set to MEETING.	Optional
CampaignId	The internal identifier of the related campaign.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber.	When updating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber.
CampaignNumber	The public unique identifier of the related campaign.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber.	When updating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber.
ClaimCode	The public unique identifier for claim.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an Activity, if you associate the Activity with a claim, provide either the internal ID, such as claim ID, or the public unique value, such as claim code. Ensure that this is a valid claim code from MKT_BDT_CLAIMS.	Optional. Ensure that this is a valid claim code from MKT_BDT_CLAIMS.
ClaimId	The internal identifier of the claim.	You can determine the public unique value of the object by exporting the object.	When creating an activity, if you associate the activity with a claim, then you must provide either the internal ID, such as claim ID, or the public unique value, such as	Optional. Ensure that this is a valid claim ID from the MKT_BDT_CLAIMS table.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
		To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	claim code. Ensure that this is a valid claim ID from the MKT_BDT_CLAIMS table.	
CorpCurrencyCode	The corporate currency used by the activity.	If no value is provided, the corresponding value from Activity production table is used.	If no value is provided, the corresponding value is used from the Assignee production table.	If no value is provided, the corresponding value is used from the Assignee production table.
CurcyConvRateType	The rate of currency conversion for an activity.	If no value is provided, the corresponding value from Activity production table is used.	If no value is provided, the corresponding value is used from the Assignee production table.	If no value is provided, the corresponding value is used from the Assignee production table.
CurrencyCode	The corporate currency used by the activity.	If no value is provided, the corresponding value from Activity production table is used.	If no value is provided, the corresponding value is used from the Assignee production table.	If no value is provided, the corresponding value is used from the Assignee production table.
CustomerAccountId	The internal identifier of the customer account related to the activity. It is the sales activity identifier from ZCA_SALES_ACCOUNTS table.	If no value is provided, the corresponding value from Activity production table is used.	The internal identifier of the customer account related to the activity. It is the sales account identifier from ZCA_SALES_ACCOUNTS table.	This should be a valid sales account identifier from the ZCA_SALES_ACCOUNTS table.
DealId	The internal identifier of the related deal registration.	You can determine the public unique value of the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional When creating an activity, if you associate the activity with a deal, you must provide either the internal ID, such as dealId, or the public unique value, such as DealNumber.	Optional When creating an activity, if you associate the activity with a deal, you must provide either the internal ID, such as dealId, or the public unique value, such as DealNumber.
DealNumber	The public unique identifier of the deal associated with the activity. The identifier can also be generated from an external source.	You can determine the public unique value of the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional When creating an activity, if you associate the activity with a deal, you must provide either the internal ID, such as dealId, or the public unique value, such as DealNumber.	Optional When creating an activity, if you associate the activity with a deal, you must provide either the internal ID, such as dealId, or the public unique value, such as DealNumber.
DelegatorId	The internal identifier of the activity resource that delegated activity ownership to another resource.	The party must exist. You can determine the PartyId of the party by exporting the Party object. To export, navigate to **Tools** > **Export**	Optional The party must exist. You can determine the PartyId of the party by exporting the Party object.	Optional The party must exist. You can determine the PartyId of the party by exporting the Party object.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
		Management > **Create Export Activity**.	To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.
DelegatorOrigSystem	The source system reference to the delegator of original system identifier.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch.	Optional
DirectionCode	The direction options for an activity. The options are inbound, outbound, or optional. The default value is null.	If no value is provided, the corresponding value from Activity production table is used.	This should be a valid lookup code corresponding to ZMM_ACTIVITY_ DIRECTION from fnd_ lookups.	This should be a valid lookup code corresponding to ZMM_ACTIVITY_ DIRECTION from fnd_ lookups.
DueDate	The date the activity is due to be completed.	If no value is provided, the corresponding value from Activity production table is used.	This should be a valid date.	This should be a valid date
Duration	The actual duration of the activity in the appropriate unit of measure.	If no value is provided, then the corresponding value from Activity production table is used. If the ActivityFunctionCode is 'APPOINTMENT' and the Duration is NULL then the default value is the duration of days between the Activity Start Date and the Activity End Date.	This is a derived field. Any value provided is ignored.	This is a derived field. Any value provided is ignored
EnrollmentId	The internal identifier of the related program enrollment.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber. This must be a valid value in the ZPM_PROGRAM_ ENROLLMENTS table.	If during update, you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber.
EnrollmentNumber	The public unique identifier of the related program enrollment.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber. This must be a valid value	If during update, you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
			in the ZPM_PROGRAM_ ENROLLMENTS table.	
FundRequestCode	The foreign key to FUND_ REQUEST_CODE of the MKT_BDT_FUND_ REQUESTS table.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_ REQUESTS table.	When updating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_ REQUESTS table.
FundRequestId	The internal identifier of the fund request.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_ REQUESTS table.	When updating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_ REQUESTS table.
LeadId	The internal identifier of the related lead.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber. Must be valid in the MKL_LM_LEADS table.	If during update, you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber.
LeadNumber	The public unique identifier of the related lead.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber. Must be valid in the MKL_LM_LEADS table.	If during update, you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber.
ObjectiveId	The internal identifier of the objective.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_ OBJECTIVES table.	When updating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_ OBJECTIVES table.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
ObjectiveNumber	The public unique identifier of the related objective.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_OBJECTIVES table.	When updating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_OBJECTIVES table.
OpportunityId	The internal identifier of the related opportunity.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with an opportunity, you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber. This must be a valid value in the MOO_OPTY table.	If during update, you associate the activity with an opportunity, then you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber.
OpportunityNumber	The internal identifier of the related opportunity.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with an opportunity, you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber. This must be a valid value in the MOO_OPTY table.	If during update, you associate the activity with an opportunity, then you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber.
OrigEntityCode	The code indicating the original source of the record.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY.	One of the following must be provided while updating an activity: • ActivityId • ActivityNumber • Combination of OrigEntityNumber and OrigEntityCode
OrigEntityNumber	The original unique identifier of the existing task, appointment, or interaction in the source system.	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL then it's defaulted to the provided value. If no value is provided, the corresponding value from Activity production table is used.	If the internal action code is "INSERT" and OrigEntityNumber and ActivityNumber are NULL, it's defaulted to the provided value.	One of the following must be provided while updating an activity: • ActivityId • ActivityNumber • Combination of OrigEntityNumber and OrigEntityCode

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
OsrAccountId	The internal identifier (reference number or text) of the account party in the original source system.	The party must exist. You can determine the Original System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional When creating an activity, if you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId	If during update, you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.
OsrDelegatorId	The source system reference to the Delegator ID.	The party must exist. You can determine the Original System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional The party must exist. You can determine the Original System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional The party must exist. You can determine the Original System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.
OsrOwnerId	The internal identifier (reference number or text) of the person who owns the activity in the original source system.	The party must exist. You can determine the Original System Reference for party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	One of the following must be provided while creating an activity: • OwnerId • OwnerResourceNumbe • Combination of OwnerOrigSystem and OsrOwnerId	The party must exist. You can determine the Original System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.
OsrPrimaryContactId	The internal identifier (reference number or text) of the contact party in the original source system.	The party must exist. You can determine the Original System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional When creating the activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumbe or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.	When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.
OsrReferenceCustomerId	The internal identifier (reference number or text)	The party must exist. You can determine the Original	When creating an activity, you associate the	When updating an activity, if you associate the

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
	of the customer in the original source system.	System Reference for the party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerId, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.	activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerId, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.
OutlookFlag	Indicates whether the activity is created in Outlook. If the value is Y, then the activity is created in Outlook and synchronized.	If no value is provided, the corresponding value from Activity production table is used. If the ActivityFunctionCode is 'APPOINTMENT' and the Action is 'INSERT' then the value is set to 'N'.	If the ActivityFunctionCode is APPOINTMENT and the action is INSERT, the value is set to N. Possible values are Y and N.	Optional Possible values are Y and N.
OwnerId	The internal identifier of the activity owner. The owner has to be an existing party (person) in system.	The party must exist. You can determine the PartyId of a person by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Provide one of the following while creating an activity: (OwnerId, OwnerResourceNumber, or a combination of OwnerOrigSystem and OsrOwnerId)	Optional Provide one of the following while updating an activity: (OwnerId, OwnerResourceNumber, or a combination of OwnerOrigSystem and OsrOwnerId)
OwnerOrigSystem	The code representing the source system for the party (person) who owns the activity.	The party must exist. You can determine the PartyId of a person by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Provide one of the following while creating an activity: (OwnerId, OwnerResourceNumber, or a combination of OwnerOrigSystem and OsrOwnerId)	Optional Provide one of the following while updating an activity: (OwnerId, OwnerResourceNumber, or a combination of OwnerOrigSystem and OsrOwnerId)
OwnerResourceNumber	The public unique identifier of the party (person) who owns the activity.	The party must exist. You can determine the PartyId of a person by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Provide one of the following while creating an activity: (OwnerId, OwnerResourceNumber, or a combination of OwnerOrigSystem and OsrOwnerId)	Optional Provide one of the following while updating an activity: (OwnerId, OwnerResourceNumber, or a combination of OwnerOrigSystem and OsrOwnerId)

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
ParentActivityId	The related activity identifier and only applicable if the record is a follow up activity.	Conditionally Required only for follow-up activity. One of the following options to identify the parent record must be provided: • The unique ID for the ParentActivityId. • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumb and ParentOrigEntityCode)	A value is required if you're creating a follow-up activity. While creating an activity, choose one of the following options to identify the record: • The unique ID for the ParentActivityId. • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumb and ParentOrigEntityCode)	Optional While updating an activity, choose one of the following options to identify the record: The unique ID for the ParentActivityId. The parent activity number (ParentActivityNumber). The source system code and source reference code (ParentOrigEntityNumber and ParentOrigEntityCode).
ParentActivityNumber	The public unique identifier of the related activity and only applicable if the record is a follow up activity.	Conditionally Required only for follow-up activity. One of the following options to identify the parent record must be provided: • The unique ID for the record (ParentActivityId) • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumb and ParentOrigEntityCode)	A value is required if you're creating a follow-up activity. While creating an activity, choose one of the following options to identify the record: • The unique ID for the record (ParentActivityId) • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumb and ParentOrigEntityCode)	Optional While updating an activity, choose one of the following options to identify the record: The unique ID for the record (ParentActivityId). The parent activity number (ParentActivityNumber). The source system code and source reference code (ParentOrigEntityNumber and ParentOrigEntityCode).
ParentOrigEntityCode	The source of the activity record that indicating whether it's coming from Task entity, Interaction entity, or Appointment entity.	Conditionally Required only for follow-up activity. One of the following options to identify the parent record must be provided: • The unique ID for the record (ParentActivityId) • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumb	A value is required if you're creating a follow-up activity. While creating an activity, choose one of the following options to identify the record: • The unique ID for the record (ParentActivityId) • The parent activity number (ParentActivityNumber • The source system code and source reference code	Optional While updating an activity, choose one of the following options to identify the record: The unique ID for the record (ParentActivityId). The parent activity number (ParentActivityNumber). The source system code and source reference code (ParentOrigEntityNumber and ParentOrigEntityCode)

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
		and ParentOrigEntityCode)	(ParentOrigEntityNumt and ParentOrigEntityCode)	
ParentOrigEntityNumber	The entity number of the parent entity in the original system to which the activity is related	Conditionally Required only for follow-up activity. One of the following options to identify the parent record must be provided: • The unique ID for the record (ParentActivityId) • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumt and ParentOrigEntityCode)	A value is required if you're creating a follow-up activity. While creating an activity, choose one of the following options to identify the record: • The unique ID for the record (ParentActivityId) • The parent activity number (ParentActivityNumber • The source system code and source reference code (ParentOrigEntityNumt and ParentOrigEntityCode)	Optional While updating an activity, choose one of the following options to identify the record: The unique ID for the record (ParentActivityId). The parent activity number (ParentActivityNumber). The source system code and source reference code (ParentOrigEntityNumber and ParentOrigEntityCode).
PartnerProgramId	The internal identifier of the related partner program.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**. For partner programs, export the Program Enrollments object.	When creating an activity, if you associate the activity with a partner program, you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNumber.	When updating an activity, if you associate the activity with a partner program, then you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNumber.
PartnerProgramNumber	The public unique identifier of the related partner program.	You can determine the public unique value of the object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**. For Partner programs, export the Program Enrollments object.	When creating an activity, if you associate the activity with a partner program, then you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNumber.	When updating an activity, if you associate the activity with a partner program, then you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNumber.
PrimaryContactId	The internal identifier of the activity contact.	The party must exist. You can determine the PartyId of the party by exporting the Party object.	Optional When creating an activity, if you associate the activity with a contact party, then you must provide either	When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
		To export, navigate to **Tools** > **Export Management** > **Create Export Activity**. If no value is provided, the corresponding value from Activity production table is used.	the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumbe or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.	public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.
PrimaryContactOrigSystem	The code representing the source system for the activity contact.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Trading Community Source Systems	Optional When creating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumbe or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.	When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.
PrimaryContactPartyNumbe	The public unique identifier of the activity contact.	The party must exist. You can determine the PartyNumber of a party by exporting either the Person object or the Organization object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Optional When creating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumbe or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.	When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.
PriorityCode	The priority of the activity. The default value is 2. The possible values are 1, 2, 3.	If no value is provided, the corresponding value from Activity production table is used.	Not required The default value is 2 (Medium). To change this value during create, you must pass this value. Valid values are 1, 2, and 3	When updating an activity, if you must modify the priority of an Activity, provide a valid value for PriorityCode.
PrivateFlag	Indicates whether the activity is private.	If no value is provided, the corresponding value from	Optional	When updating an activity, if you must mark an

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
		Activity production table is used.	When creating an Activity, if you must mark an Activity as private, set this variable to 'Y'.	Activity as private, set this variable to 'Y'.
RecurSerOrigEntityNumber	The entity number of the recurring appointment in the original system, to which this activity is related	If no value is provided, the corresponding value from Activity production table is used.	A value is required if you're creating a recurring activity (appointment). While creating an activity, choose one of the following options to identify the record: • The unique ID for the record (RecurSeriesId) • The recurring series activity number (RecurSeriesActivityNu • The entity number of the recurring appointment in the original system, to which this activity is related (RecurSerOrigEntityNu	Optional
RecurSeriesActivityNumb	The activity number of an instance of a series.	If no value is provided, the corresponding value from Activity production table is used.	A value is required if you're creating a recurring activity (appointment). While creating an activity, choose one of the following options to identify the record: • The unique ID for the record (RecurSeriesId) • The recurring series activity number (RecurSeriesActivityNu • The entity number of the recurring appointment in the original system, to which this activity is related (RecurSerOrigEntityNu	Optional
RecurSeriesId	The internal identifier for the series that links instances of a series together.	If no value is provided, the corresponding value from Activity production table is used.	A value is required if you're creating a recurring activity (appointment). While creating an activity, choose one of the following options to identify the record: • The unique ID for the record (RecurSeriesId)	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
			• The recurring series activity number (RecurSeriesActivityNu • The entity number of the recurring appointment in the original system, to which this activity is related (RecurSerOrigEntityNu	
RecurWeekday	The activity that recurs on every weekday such as Monday to Sunday, Weekday, Weekend, and so on.	If no value is provided, the corresponding value from Activity production table is used.	Conditionally required for a weekly recurring appointment. Must be a valid value from ZMM_ACTIVITY_RECUR_DAYWEEK_CD lookup.	Conditionally required for a weekly recurring appointment. Must be a valid value from ZMM_ACTIVITY_RECUR_DAYWEEK_CD lookup.
RefCustOrigSystem	The source system code for the reference customer.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area:. • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Trading Community Source Systems	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Trading Community Source Systems	When updating an activity, if you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerId, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.
RefCustPartyNumber	The public unique identifier of the reference customer who's associated with the activity.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export	When updating an activity, if you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerId, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
		• Task: Manage Trading Community Source Systems	• Task: Manage Trading Community Source Systems	
ReferenceCustomerId	The internal identifier of the reference customer who's associated with the activity.	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Trading Community Source Systems	The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Trading Community Source Systems	When updating an activity, if you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerId, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.
SrId	The foreign key to SR_ ID in the SVC_SERVICE_ REQUESTS table.	You can determine the public unique value of this object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value, such as SrNumber. This must be a valid value in SVC_SERVICE_REQUESTS.	When updating an activity, if you associate the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value, such as SrNumber. This must be a valid value in SVC_SERVICE_REQUESTS.
SrNumber	The foreign key to SR_ NUMBER in the SVC_ SERVICE_REQUESTS table.	You can determine the public unique value of this object by exporting the object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	When creating an activity, if you associate the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value, such as SrNumber. This must be a valid value in SVC_SERVICE_REQUESTS.	When updating an activity, if you associate the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value, such as SrNumber. This must be a valid value in SVC_SERVICE_REQUESTS.
StatusCode	The status of the activity. The default value is Not Started.	If no value is provided, the default is NOT_STARTED. The lookup Type used is ZMM_ACTIVITY_STATUS_ CD.	If no value is provided, the default is NOT_STARTED. The lookup Type used is ZMM_ACTIVITY_STATUS_ CD.	Optional The lookup Type used is ZMM_ACTIVITY_STATUS_ CD.
Subject	The unique subject, name, or title of the activity.	No validation	A value is required if you're creating a new activity.	Not Required
SubmittedBy	The user who submitted the call report.	Conditionally required for a call report in **Submitted** status.	Conditionally required for a call report in **Submitted** status.	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity record	Updating an Existing Activity record
			It must be a valid value in the HZ_PARTIES table.	Conditionally required for a call report in **Submitted** status. It must be a valid value in the HZ_PARTIES table.
SubmittedDate	The date and time when the call report was submitted.	None	Conditionally required for a call report in **Submitted** status. This must be a valid date.	Conditionally required for a call report in **Submitted** status. This must be a valid date.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the activity object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Activity** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the activity information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Activity from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Activity Assignee Data

You can use Import Management to create, update, or delete your activity assignee data.

You can import activity assignee records using these steps:

1. Map your source activity assignee data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the activity assignee data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import activity assignee data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

If you want to import only a few records, then you can create a single CSV file for all activity assignee attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the activity assignee child objects. Note that you must have imported the CSV file for activity assignee object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new accounts or are updating accounts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Activity Assignee Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for activity assignee records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Assignee record	Updating an Existing Activity Assignee record
ActivityId	The internal identifier of the activity to which the assignee is associated.	Automatically generated by the import process if creating a new activity record.	Optional	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode)
ActivityNumber	The public unique identifier of the activity to which the assignee is associated	If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object.	A value is required if you're creating a new activity.	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Assignee record	Updating an Existing Activity Assignee record
		Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes The table ZMM_ACTY_ ACTIVITIES with column ACTIVITY_NUMBER holds the existing value.		following options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode)
AssigneeId	The internal identifier of the HZ_PARTY record having PARTY_USAGE as Resource.	If no value is provided, the corresponding value from Assignee production table is used.	A value is required if you're associating a new assignee to an activity. One of the following must be provided while creating an assignee: • AssigneeId • AssigneeResourceNum • Combination of AssigneeOrigSystem and OsrAssigneeId	To update or delete an existing activity assignee you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId, AssigneeId) • The activity number (ActivityNumber, AssigneeId) • The source system code and reference (OrigEntityNumber and OrigEntityCode)
AssigneeOrigSystem	The source system reference to the assigned resource organization.	None	A value is required if you're associating a new assignee to an activity. One of the following must be provided while creating an assignee: • AssigneeId • AssigneeResourceNum • Combination of AssigneeOrigSystem and OsrAssigneeId	Not Required
AssigneeResourceNumber	The resource number associated with an assignee.	None	A value is required if you're associating a new assignee to an activity. One of the following must be provided while creating an assignee: • AssigneeId	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Assignee record	Updating an Existing Activity Assignee record
			• AssigneeResourceNum • Combination of AssigneeOrigSystem and OsrAssigneeId	
OrigEntityCode	The code indicating the original source of the activity the activity to which the assignee is associated.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode)
OrigEntityNumber	The original unique identifier of the existing task, appointment, or interaction in the source system.	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL then it will be defaulted to the provided value. If no value is provided, the corresponding value from Assignee production table is used.	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL, the value will be set to the value provided by the user. If no value is provided, the corresponding value is used from the Assignee production table.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode)
OsrAssigneeId	The source system reference of the assignee..	The party must exist. You can determine the Original System Reference for the party by exporting the Party object.	A value is required if you're associating a new assignee to an activity. One of the following must be provided while creating an assignee: • AssigneeId	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Assignee record	Updating an Existing Activity Assignee record
		Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	• AssigneeResourceNum • Combination of AssigneeOrigSystem and OsrAssigneeId	

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the activity assignee object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Activity Assignee** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the activity assignee information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Activity Assignee from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

How do I import activity contact data?

You can use Import Management to create, update, or delete your activity contact data.

You can import activity contact records using these steps:

1. Map your source activity contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the activity contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import activity contact data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new activity contacts or are updating activity contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Activity Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for activity contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
ActivityId	The internal identifier of the activity to which the contact is associated.	Automatically generated by the import process if creating a new activity record.	The value is generated automatically by the import process if creating a new activity record.	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record: • The unique ID for the record (ActivityId). • The activity number (ActivityNumber). • The source system code and reference (OrigEntityNumber and OrigEntityCode).
ActivityNumber	The public unique identifier of the activity to which the contact is associated	If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales	A value is required if you're creating a new activity.	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record: • The unique ID for the record (ActivityId).

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
		• Functional Area: Data Import and Export • Task: Schedule Export Processes The table ZMM_ACTY_ ACTIVITIES with column ACTIVITY_NUMBER holds the existing value.		• The activity number (ActivityNumber). • The source system code and reference (OrigEntityNumber and OrigEntityCode).
ContactId	The party of type person who's involved with this appointment..	If no value is provided, the corresponding value from the Contacts production table is used.	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating a contact: • ContactId • ContactPartyNumber • Combination of ContactOrigSystem and OsrContactId	To update or delete an existing activity contact, select one of the following options to identify the record: • The unique ID for the record (ActivityId, ContactId). • The activity number (ActivityNumber, ContactId). • The source system code and reference (OrigEntityNumber and OrigEntityCode).
ContactOrigSystem	The source system for the activity with which the contact is associated.	No Validation	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating a contact: • ContactId • ContactPartyNumber • Combination of ContactOrigSystem and OsrContactId	Not Required
ContactPartyNumber	The party number of the contact.	This must be a valid party in the HZ_PARTIES table.	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating a contact: • ContactId • ContactPartyNumber • Combination of ContactOrigSystem and OsrContactId	This must be a valid party in the HZ_PARTIES table

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
CorpCurrencyCode	The corporate currency used by the activity to which the contact is associated.	If no value is provided, the corresponding value from the Contacts production table is used.	If no value is provided, the corresponding value is used from the Contacts production table.	If no value is provided, the corresponding value is used from the Contacts production table.
OrigEntityCode	The code indicating the original source of the activity the activity to which the contact is associated.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. **Note:** If the record was created in the Activity Management component, the value is ACTIVITY.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. **Note:** If the record was created in the Activity Management component, the value is ACTIVITY.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId). • The activity number (ActivityNumber). • The source system code and reference (OrigEntityNumber and OrigEntityCode).
OrigEntityNumber	The ID that identifies the entity record in the original system..	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL then it will be defaulted to the provided value. If no value is provided, the corresponding value from Contacts production table is used.	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL, the value will be set to the value provided by the user. If no value is provided, the corresponding value is used from the Contacts production table.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId). • The activity number (ActivityNumber). • The source system code and reference (OrigEntityNumber and OrigEntityCode).
OsrContactId	The source system reference of the contact..	The contact must exist in system. You can determine the original system reference for the Contact by exporting the Contacts object.	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating an assignee: • ContactId	The contact must exist in system. You can determine the original system reference for the Contact by exporting the Contacts object.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
		Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	• ContactPartyNumber • Combination of ContactOrigSystem and OsrContactId	Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes
OsrContactOrgId	The source system reference to the contact organization. It is used to update the RELATIONSHIP_ ID in the interface table (ZMM_IMP_ACTY_ CONTACTS) based on HZ_ PARTIES.	This must be a valid organization type in the HZ_PARTIES table.	This must be a valid organization type in the HZ_PARTIES table.	This must be a valid organization type in the HZ_PARTIES table.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the activity contact object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Activity Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the activity contact information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Activity Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Activity Objective Data

You can use Import Management to create, update, or delete your activity objective data.

You can import activity objective records using these steps:

1. Map your source activity objective data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the activity objective data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import activity objective data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

If you want to import only a few records, then you can create a single CSV file for all activity objective attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the activity objective child objects. Note that you must have imported the CSV file for activity objective object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new activity objectives or are updating activity objectives that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Activity Objective Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for activity objective records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Objective record	Updating an Existing Activity Objective record
ActionCode	Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.	If value isn't provided, record matching is used to determine whether a record is updated (if it already exists) or inserted (if it doesn't exist). The valid values are INSERT, UPDATE, and DELETE.	Optional	To delete a record, you must provide the value as DELETE. It is optional to provide values for insert and update as the framework internally decides the action as INSERT if it's a new record or UPDATE if it's an existing record.
ActivityId	The internal identifier of the activity to which the Objective is associated.	Automatically generated by the import process if creating a new activity record.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Objective record	Updating an Existing Activity Objective record
			options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode) A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)	options to identify the record: • The unique ID for the record (ActivityId) • The activity number (ActivityNumber) • The source system code and reference (OrigEntityNumber and OrigEntityCode) A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)
ActivityNumber	The public unique identifier of the activity to which the Objective is associated	If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes The table ZMM_ACTY_ ACTIVITIES with column ACTIVITY_NUMBER holds the existing value.	A value is required if you're: • Creating an activity • Updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId). • The activity number (ActivityNumber). • The source system code and reference (OrigEntityNumber and OrigEntityCode).	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: • The unique ID for the record (ActivityId). • The activity number (ActivityNumber). • The source system code and reference (OrigEntityNumber and OrigEntityCode).
ObjectiveCode	The set of predefined objectives defined by the administrator	A value is required if you're associating a new objective to an activity and you're not providing other values to identify	A value is required if you're associating a new objective to an activity and you're not providing other values to identify	A value is required if you're associating a new objective to an activity and you're not providing other values to identify

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Objective record	Updating an Existing Activity Objective record
		the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)	the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)	the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)
ObjectiveFreefmtText	The objective in free form text as provided by the user.	A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)	A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)	A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)
ObjectiveId	The internal identifier of the objective associated with the activity.	If no value is provided, the corresponding value from the Objectives production table is used.	A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)	A value is required if you're associating a new objective to an activity and you're not providing other values to identify the objective record. You must choose one of the following options to identify the objective record: • ObjectiveId • Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)
OrigEntityCode	The code indicating the original source of the activity the activity to which the Objective is associated.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY.
OrigEntityNumber	The original unique identifier of the existing task, appointment, or	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Objective record	Updating an Existing Activity Objective record
	interaction in the source system.	If the record was created in the Activity Management component, the value is ACTIVITY	If the record was created in the Activity Management component, the value is ACTIVITY.	If the record was created in the Activity Management component, the value is ACTIVITY.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the activity objective object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Activity Objective** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the activity objective information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Activity Objective from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Additional Name Data

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

To import Additional Name records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Additional Name data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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. 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 Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Additional Name object, the attributes are NameID and RegistryID.

Required Attributes and Validations

To import data successfully into Oracle Applications 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 Additional Name records, required attributes for updating Additional Name records, prerequisite setup tasks for the attributes, and specific validations, if any, for Additional Name import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Additional Name Record	Updating an Existing Additional Name Record
NameId	Unique identifier of the address record as the primary key	No Validation	Not required	Optional Either the NameId or a combination of Source System and Source System Reference can be passed.
StatusFlag	The status of the additional name	Defaults to Y during creation.	Not required	To inactivate an existing active Additional Name record, provide the value as "N".
NameType	Additional Name Type	This must be a valid name type. The name types can be managed in Manage Name Types.	Required	If you don't provide the primary key, provide the existing additional name type.
PartyNumber	The public unique identifier of the party record to which the Additional Name is associated.	The party number should exist.	Conditionally required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
PartySourceSystem	The code representing the source system for the party (account, contact, household, or legal entity) to which the Additional name belongs.	Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in	Conditionally required Provide one of the following : • PartyId (internal ID)	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Additional Name Record	Updating an Existing Additional Name Record
		the same batch as this Additional Name.	• PartySourceSystem and PartySourceSystemRef(system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	
PartySourceSystemReferenc	The reference number or text representing the source system unique ID for the party (account, contact, household, or legal entity) to which the Additional Name belongs.	Identify the reference value from your source system that was used when you imported the party in a prior batch, or identify the source system reference that you will use when importing the party in the same batch as this Additional Name.	Conditionally required Provide one of the following : • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef(system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
PartyId	The unique identifier as primary key of the party record to which the additional name is associated.	Identify the party ID value by exporting the relevant Party object such as Account, Contact, and so on.	Conditionally required Provide one of the following : • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef(system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
SourceSystem	Name of external source system of the account, contact or household	The source system should exist.	Optional	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Additional Name Record	Updating an Existing Additional Name Record
	with which the address is associated.	You can manage source systems from the Manage Source Systems task.	If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	
SourceSystemReferenceValu	Specifies the identifier in the original source system	No validation	Provide a valid value.	Not required

You can view the Additional Name object 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 file-based data import process. You must populate the CSV file with the data you want to import into Oracle Applications Cloud.

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

1. In the Navigator, under Tools, click Import Management.
2. Click 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. You can attach different types of files, giving each file a specific description.

PartyNumber	NameType	AdditionalName
RN_PTY_06_MAR_19_A1	LEGAL	Test_Addname_A1
RN_PTY_06_MAR_19_A2	LEGAL	Test_Addname_A2
RN_PTY_06_MAR_19_A3	LEGAL	Test_Addname_A3
RN_PTY_06_MAR_19_A4	LEGAL	Test_Addname_A4
RN_PTY_06_MAR_19_A5	LEGAL	Test_Addname_A5

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Additional Name** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- How do I import data?

Import Your Additional Identifier Data

You can use Import Management to create or update Additional Identifier records.

To import Additional Identifier records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Additional Identifier data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Additional Identifiers. You can determine the internal ID of a record by exporting Oracle Applications 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 Additional Identifier object, the attributes are PartyIdentifierID and PartyID.
- 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 Additional Identifier object, the attribute is PartyNumber.

Required Attributes and Validations for the Additional Identifier Object

To import data successfully into Oracle Applications 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 Additional Identifier records, required attributes for updating Additional Identifier records, prerequisite setup tasks for the attributes, and specific validations, if any, for Additional Identifier import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Additional Identifier Record	Updating an Existing Additional Identifier Record
PartySourceSystem	The code representing the source system for the party (account, contact, household, or legal entity) to which the Additional identifier belongs	Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in the same batch as this Additional identifier.	Conditionally required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
PartySourceSystemReferenc	The reference number or text representing the source system unique ID for the party (account, contact, household, or legal entity) to which the Additional identifier belongs.	Identify the reference value from your source system that was used when you imported the party in a prior batch, or identify the source system reference that you will use when importing the party in the same batch as this Additional identifier.	Conditionally required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
PartyIdentifierID	Unique identifier of the additional identifier of the party	No validation	Not required	Required
StatusCode	The status of the additional identifier	Not required This defaults to Y during creation.	Not required	To inactivate existing active Additional Name record, provide the value as N.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Additional Identifier Record	Updating an Existing Additional Identifier Record
PartyIdentifierType	The type of the Additional Identifier import	The Identifier Type must exist. You can manage additional types using the Manage Additional Name Types task.	Required	Not required
PartyIdentifierValue	Value to be imported for the Identifier Type	Mandatory field	Required	Not required
PartyNumber	The public unique identifier of the party record to which the Additional identifier is associated.	The party number should exist.	Conditionally required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
PartyID	The unique identifier as primary key of the party record to which the additional identifier is associated.	Identify the party ID value by exporting the relevant Party object such as Account, Contact, and so on.	Conditionally required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Additional Identifier Record	Updating an Existing Additional Identifier Record
SourceSystem	Name of external source system of the account, contact or household with which the Additional identifier is associated.	The source system should exist. You can manage source systems from the Manage Source Systems task.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required
SourceSystemReferenceValu	Specifies the identifier in the original source system.	The combination of Source System and Source System Reference Value should be unique.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required

You can view the Additional Identifier object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Additional Identifier** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Additional Identifier** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Address Data

You can use the import functionality to create, update, or delete address records.

You can import address records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the address data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import address data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the address import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all address attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the address child objects. Note that you must have imported the CSV file for address object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new address or are updating address that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Address Object

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

This table lists the required attributes for address records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address record	Updating an Existing Address record
PartyId	The internal ID for the party (account, contact, household, or legal entity) to which the address belongs	Identify the party ID value by exporting the relevant Party object such as Account, Contact, and so on.	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemReference (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address record	Updating an Existing Address record
			for an organization profile), which is PARTY_SITE_ NUMBER for address	for an organization profile), which is PARTY_SITE_ NUMBER for address
PartyNumber	The code representing the source system for the party (account, contact, household, or legal entity) to which the address belongs.	Identify the party ID value by exporting the relevant Party object such as Account, Contact, and so on.	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile), which is PARTY_SITE_ NUMBER for address	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemReference (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile), which is PARTY_SITE_ NUMBER for address
PartySourceSystem	The code representing the source system for the party (account, contact, household, or legal entity) to which the address belongs.	Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in the same batch as this address	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile), which is PARTY_SITE_ NUMBER for address	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemReference (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile), which is PARTY_SITE_ NUMBER for address
PartySourceSystemReferenc	The reference number or text representing the source system unique ID	Identify the reference value from your source system that was used when you	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address record	Updating an Existing Address record
	for the party (account, contact, household, or legal entity) to which the address belongs.	imported the party in a prior batch, or identify the source system reference that you will use when importing the party in the same batch as this address.	Provide reference information to identify the existing party. The reference information can be: • PartyId (Sales and Fusion Service internal ID) • PartySourceSystem and PartySourceSystemRef (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile), which is PARTY_SITE_ NUMBER for address	Provide reference information to identify the existing party. The reference information can be: • PartyId (Sales and Fusion Service internal ID) • PartySourceSystem and PartySourceSystemReference (source system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile), which is PARTY_SITE_ NUMBER for address
PrimaryFlag	Identifies the primary address for the parent party record.	Only one of the child records can be Primary.	Optional	Optional Pass Y to set Primary and N to reset an existing primary record.
Status	Indicates the current status of the address record.	Not required Defaults to A (Active)	Not required Defaults to A (Active)	Optional Pass A to set the status to Active and I to set the status to Inactive.
AddressId	Unique identifier of the address record as primary key.	No validation	Not required	Optional Either the AddressId or the AddressNumber can be passed.
Country	The country code component of the postal address.	Identify valid country codes.	Required	Not required.
LocationId	The unique ID for the existing location record in the destination table.	Identify the LOCATION_ ID for an existing location by exporting the Location object.	Optional	Optional
StartDateActive	The date on which the address becomes valid.	No validation	This is a PUID for Address. If a value is passed, it will be	The Address record can be updated by passing the Address Number.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address record	Updating an Existing Address record
			imported. Otherwise, it will be auto-generated.	
AddressNumber	The address internal unique identifier that's internally generated when creating an address	None	This is a PUID for Address. If a value is passed, it will be imported. Otherwise, it will be auto-generated.	The Address record can be updated by passing the Address Number.
SourceSystem	Name of external source system of the account, contact or household with which the address is associated.	The source system should exist. You can manage source systems from the Manage Source Systems task.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required
SourceSystemReferenceValu	Specifies the identifier in the original source system	Combination of Source System and Source System Reference Value should be unique.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required
DoNotValidateFlag	Option to indicate that a specific location isn't eligible for address validation	No validation The values can be Y, N, or blank.	Optional If you don't pass a value, set to No.	Optional
DunsNumberC	A unique nine-digit identification number assigned to business entities by Dun and Bradstreet	No validation	Not required	Not required
PartySiteName	User defined name for the site	No validation	Not required	Not required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the address object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Address object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Providing the ZIP and Country Code values in the import CSV file will not automatically populate the State/County/City fields. Values for these fields should be separately provided in the import file.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the address information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Address** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

> **Note:** After importing data successfully, you need to run the following scheduled processes:
> 1. Validate Geographies of Addresses against Master Geographies: This job helps you validate an address against master geography data and generates geography naming references. For more information about the Validate Geographies of Addresses against Master Geographies post processing job, see the section "Validate Geographies of Addresses against Master Geographies" in the `Understanding Scheduled Processes` guide.
> 2. Populate Location Latitude and Longitude Information: This job helps you select and geocode newly created or updated addresses at regular time intervals. For more information about the Populate Location Latitude and Longitude Information post processing job, see the section "Populate Location Latitude and Longitude Information" in the `Understanding Scheduled Processes` guide.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Address Locale Data

You can use Import Management to create, update, or delete your address locale data.

You can import address locale records using these steps:

1. Map your source address locale data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the address locale data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import address locale data into Oracle Applications Cloud from a CSV file with your source data that's mapped to target object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the address locale import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for each attribute in your source data.
- You have all the parent records in place before importing child records. For example, when importing the address locale, ensure the address exists.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system.

Required Attributes and Validations for Address Locale Object

To import data into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application. This table lists the required attributes for address locale records, prerequisite setup tasks for the attributes, and specific validations, if any.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address Locale Record	Updating an Existing Address Locale Record
LocationId	Location ID	To obtain a list of all locations, export the address object.	Conditionally required To create address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemRefer • AddressNumber • LocationId	Conditionally required To update an existing address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemReference • AddressNumber • LocationId • LocationLocaleId
LocationLocaleId	Address Locale ID. The unique ID for the existing address locale record.	N/A	Not required	If available, you can provide this to update other attributes
AddressNumber	Party site number of the address locale.	To obtain a list of all address IDs and address numbers, export the address object.	Conditionally required To create address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemRefer • AddressNumber • LocationId	Conditionally required To update an existing address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemReference • AddressNumber • LocationId • LocationLocaleId
SiteSourceSystem	Source system of the address	Know the source system. To view source systems, use the Manage Trading Community Source System task.	Conditionally required To create address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemRefer • AddressNumber	Conditionally required To update an existing address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemReference • AddressNumber

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address Locale Record	Updating an Existing Address Locale Record
			• LocationId	• LocationId • LocationLocaleId
SiteSourceSystemReference'	Source system reference of the address	Know the source system reference. To view source systems reference, use the Manage Trading Community Source System Reference task.	Conditionally required To create address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemRefer • AddressNumber • LocationId	Conditionally required To update an existing address locale record, one of the following is required: • Combination of SiteSourceSystem and SiteSourceSystemReference • AddressNumber • LocationId • LocationLocaleId
TransliterationLanguage	Language code in which the address locale is created	To view the languages, use the Manage Languages task	Required	Not Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the address locale object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data you want to import into Oracle Applications Cloud in a CSV file.

You can use the templates available in the Import Object Details page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Address Locale object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the address locale information.

To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** button on the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Address Locale from the **Object** drop-down list.
4. Select the CSV file in the **File Name**, field, and click **Next**.

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required. Click **Next**.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**.
7. Review the import details on the **Review and Submit** page and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Import Activity** page. This page has the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier. The Import Status column shows the status of the import activity.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Address Purpose Data

You can use the import functionality to create or update Address Purpose records.

You can import Address Purpose records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Address Purpose data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Address Purpose data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Address Purpose import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Address Purposes while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Address Purpose attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Address Purpose child objects. Note that you must have imported the CSV file for Address Purpose object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing a new Address Purpose or are updating Address Purpose records that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Address Purpose Object

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

This table lists the required attributes for Address Purpose records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address Purpose record	Updating an Existing Address Purpose record
SiteSourceSystem	The name of the external source system for the Address record to which the Address Purpose is associated.	A combination of a valid SiteSourceSystem and SiteSourceSystemReference' which are already imported	Either the AddressId, Address Number or the combination of SiteSourceSystem and SiteSourceSystemReference' is required.	Not required
SiteSourceSystemReference'	The identifier of the source system for the address record to which the Address Purpose is associated.	A combination of a valid SiteSourceSystem and SiteSourceSystemReference' which are already imported	Either the AddressId, Address Number or the combination of SiteSourceSystem and SiteSourceSystemReference' is required.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address Purpose record	Updating an Existing Address Purpose record
PrimaryPerType	This specifies the record that's imported as the primary key for a site use type. Specify Y for a record to set the specified site use type as the primary key.	Y, N, or NULL Enter Y or N. Alternatively, don't enter any value. The default value is N.	Not required	Not required
AddressPurposeId	The primary key of the Address Purpose record	No validation	Not required	Conditionally Required To identify an address purpose record, use one of these: • SourceSystem and SourceSystemReferenceValue • AddressPurposeId
Purpose	The site codes such as SHIP_TO and BILL_TO that identify the Address Purpose	The values are validated against the Lookup values for Site use codes.	Required	Not required
StartDate	The start date of the Address Purpose	The date can't be earlier than the Address start date.	Not required	Not required
EndDate	The end date of the Address Purpose	This date can't be later than the Address end date.	Not required	Not required
AddressId	The primary key of the Address record	No validation	Either the AddressId, Address Number or the combination of SiteSourceSystem and SiteSourceSystemReference' is required.	Not required
AddressNumber	The public unique identifier of the address	Valid Address Number (Party Site Number)	Either the AddressId, Address Number or the combination of SiteSourceSystem and SiteSourceSystemReference' is required.	Not required
SourceSystem	Name of external source system of the address purpose for the address that's associated with the account, contact, or household.	The source system should exist. You can manage source systems from the Manage Source Systems task.	Optional If your data source data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Conditionally Required To identify an address purpose record, use one of these: • SourceSystem and SourceSystemReferenceValue • AddressPurposeId

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Address Purpose record	Updating an Existing Address Purpose record
SourceSystemReferenceValu	Specifies the identifier in the original source system for the Address Purpose record.	The combination of Source System and Source System Reference Value should be unique.	Optional If your data source is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Conditionally Required To identify an address purpose record, use one of these: • SourceSystem and SourceSystemReferenceValue • AddressPurposeId

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Address Purpose object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Address Purpose object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Address Purpose information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Address Purpose** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Asset Data

Import Your Asset Data

You can use the Import Management to create, update, or delete asset records.

You can import asset records using these steps:

1. Map your source asset data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the asset data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your asset data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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

To better manage your asset information, the asset object has the following child objects:

- Asset Contact
- Asset Resource

If you want to import only a few records, then you can create a single CSV file for all asset attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the asset child objects. Note that you must have imported the CSV file for asset object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new assets or are updating assets that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Asset Object

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

This table lists the required attributes for asset records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Asset record	Updating an Existing Asset record
AssetNumber	The unique ID for the existing asset record in the destination table.	None	Required	Required
AssetOrigSystem	A source system code that identifies the original source system of the asset.	None	Not required	Not required
AssetOrigSystemReference	A source system reference that's the unique ID of the asset in your legacy or external system.	None	Not required	Not required
CustomerId	The unique ID for the existing customer party record in the destination table.	The party must exist.	Required	Not required
AccountSourceSystem	Specifies the account source system.	You must enter a valid source system and source	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Asset record	Updating an Existing Asset record
		system reference for the account.		
AccountSourceSystemRefere	Specifies the account source system reference.	You must enter valid source system and source system reference for the account.	Not required	Not required
ContactSourceSystem	Specifies the contact source system.	You must enter a valid source system reference information.	Not required	Not required
ContactSourceSystemRefere	Specifies the contact source system reference.	You must enter a valid source system reference information.	Not required	Not required
ItemSourceSystem	Specifies the item source system.	You must enter a valid item source system reference number and purchase date.	Not required	Not required
ItemSourceSystemReference	Specifies the item source system reference.	You must enter a valid item source system reference number and purchase date.	Not required	Not required
EmailAddress	The email address associated to the asset.	You must enter a valid resource email.	Not required	Not required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the asset object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Asset** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the asset information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Asset from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Import Your Asset Contact Data
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- Import Your Asset Resource Data

Example of Updating the Status of an Asset

You can change the status of an asset by updating its end-date and setting the status to 'EXPIRED'. To update an asset, your source file must include the values that let the import process identify the existing records.

Before You Begin

The scenario in this example assumes that the following prerequisites have already been set up.

- Assets must exist in the application.
- User accounts are set up for the already existing assets.
- Appropriate business units are set up using the Manage Business Unit task.

  To find the business unit, navigate to the following in the Setup and Maintenance work area:

  - Offering: Sales
  - Function Area: Data Import and Export
  - Task: Manage Business Units
- Appropriate legal entities are set up using the Manage Legal Entities task. To find the legal entity, navigate to the following in the Setup and Maintenance work area:

  - Offering: Sales
  - Function Area: Data Import and Export
  - Task: Manage Legal Entities

Scenario

In this scenario, AssetNumber for the given asset is 782400089. Note the name of this asset, say 'Green Server 5000'. You must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
AssetNumber	782400089
EndDate	6/1/2005
StatusCode	'EXPIRED'

You can import the source data file as explained below:

1. Navigate to **Tools** > **Import Management**.
2. Click **Create Import Activity** on the Manage Imports page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Assets from the Object drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click **Next**.

   > **Note:** Validation errors, if any, are displayed on the **Mapping Validation** screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. You can navigate to **Workspace** and search for the asset name 'Green Server 5000' to verify the updated status.

Example of Updating the Owner Name of an Asset

You can change the owner name of an asset. To update an asset, your source file must include the values that let the import process identify the existing records.

Before You Begin

The scenario in this example assumes that the following prerequisites have already been set up.

- Assets must exist in the application.
- User accounts are set up for the already existing assets.
- Appropriate business units are set up using the Manage Business Unit task.

  To find the business unit, navigate to the following in the Setup and Maintenance work area:

  - Offering: Sales

    - Function Area: Data Import and Export
    - Task: Manage Business Units

- Appropriate legal entities are set up using the Manage Legal Entities task. To find the legal entity, navigate to the following in the Setup and Maintenance work area:
    - Offering: Sales
    - Function Area: Data Import and Export
    - Task: Manage Legal Entities

Scenario

In this scenario, AssetNumber for the given asset is 782400089. Note the name of this asset, say 'Green Server 5000'. You must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
AssetNumber	782400089
AccountNameTransientForLOV	FSACCOUNT (DENVER, US)

You can import the source data file as explained below:

1. Navigate to **Tools** > **Import Management**.
2. Click **Create Import Activity** on the Manage Imports page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Assets from the Object drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click **Next**.

    Note: Validation errors, if any, are displayed on the **Mapping Validation** screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. You can navigate to **Workspace** and search for the asset name 'Green Server 5000', to verify the updated owner name.

Import Your Asset Contact Data

You can use Import Management to create, update, or delete your asset contact data.

You can import asset contact records using these steps:

1. Map your source asset contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the asset contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import asset contact data into Oracle Applications Cloud from a CSV file with your source data that's mapped to target object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the asset import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for each attribute in your source data. For example, when using source system reference information to identify your asset records, the source system of the asset object should be enabled for parties in the Manage Trading Community Source Systems task.
- You have all the parent records in place before importing child records. For example, when importing the asset contact, ensure the asset exists.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For asset object, the attribute is AssetNumber and shows up in the UI as Asset Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new accounts or are updating accounts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Asset Contact Object

To import data into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application. This table lists the required attributes for asset contact records, prerequisite setup tasks for the attributes, and specific validations, if any.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Asset Contact record	Updating an Existing Asset Contact record
ContactPartyId	Unique party identifier representing a contact.	The party must exist.	Required	Required
AssetId	The unique ID for the existing asset record in the destination table.	An asset record with the Asset ID should exist.	Conditionally required when you don't provide the Asset Number.	Conditionally required when you don't provide the Asset Number.
AssetNumber	The unique ID for the existing asset record in the destination table.	An asset record with the Asset Number should exist.	Conditionally required when you don't provide the Asset ID.	Conditionally required when you don't provide the Asset ID.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the account object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data you want to import into Oracle Applications Cloud in a CSV file.

You can use the templates available in the Import Object Details page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Asset Contact object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

AssetNumber	ContactPartyId	ContactFunctionCode
900546	300000018487543	ORA_ZCM_ASSET_MANAGER
900604	300000018487544	ORA_ZCM_MAINTENANCE_ENGINEEER

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the asset information.

To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** button on the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select **Asset Contact** from the **Object** drop-down list.
4. Select the CSV file in the **File Name**, field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required. Click **Next**.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**.
7. Review the import details on the **Review and Submit** page and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Import Activity** page. This page has the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier. The Import Status column shows the status of the import activity.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Import Your Asset Resource Data

You can use Import Management to create, update, or delete your Asset Resource data.

To import asset resource records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Asset Resource data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

To better manage your Asset Resource information, the Asset Resource object has the following child objects:

- Address

- Classification
- Relationship
- Sales Team Member

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Asset Resources or are updating Asset Resources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for the Asset Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for Asset Resource records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Asset Resource record	Updating an Existing Asset Resource record
AssetId	The unique ID for the existing asset record in the destination table.	An asset record with the Asset ID should exist	Conditionally required when you don't provide the Asset Number	Conditionally required when you don't provide the Asset Number
AssetNumber	The unique ID for the existing asset record in the destination table.	An asset record with the Asset Number should exist	Conditionally required when you don't provide the Asset ID	Conditionally required when you don't provide the Asset ID
Resource Party ID	Unique party identifier representing a resource	The party must exist.	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Asset Resource object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Asset Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Asset Resource information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Asset Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Assignment Rule Candidate Data

You can use Import Management to create, update, or delete your assignment rule candidate data.

You can import assignment rule candidate records using these steps:

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

How You Map Your Source Data to Target Object Attributes

You import assignment rule candidate data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plans or are updating action plans that have source system reference data, then provide the source system and source system reference values.

Review Required Attributes and Validations for Assignment Rule Candidate Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for assignment rule candidate records, prerequisite setup tasks and specific validations, if any:

Review Required Attributes and Validations for Assignment Rule Candidate Object

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Assignment Rule Candidate Record	Updating an Existing Assignment Rule Candidate Record	Deleting an Existing Assignment Rule Candidate Record
RuleNumber	The alternate identifier of the assignment rule.	None	Required	Not Required	Not Required
CandidateObjectPUID	The alternate identifier of the candidate object.	Validate the PUID/ID exist in the system for corresponding candidate object.	Conditionally Required. Provide value if CandidateObjectId isn't provided.	Not Required	Not Required
CandidateObjectId	The unique identifier of the candidate object.	Validate the PUID/ID exist in the system for corresponding candidate object.	Conditionally Required. Provide value if CandidateObjectPUID isn't provided.	Not Required	Not Required
RuleCandidateNumber	The identifier of the assignment rule candidate.	None	Not Required	Required	Required

You can view the Assignment Rule Candidate 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Assignment Rule Candidate object in the table and click Download.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the assignment rule candidate information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Assignment Rule Candidate from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Assignment Rule Condition Data

You can use Import Management to create, update, or delete your assignment rule condition data.

You can import assignment rule condition records using these steps:

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

How You Map Your Source Data to Target Object Attributes

You import assignment rule condition data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plans or are updating action plans that have source system reference data, then provide the source system and source system reference values.

Review Required Attributes and Validations for Assignment Rule Condition Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for assignment rule condition records, prerequisite setup tasks and specific validations, if any:

Review Required Attributes and Validations for Assignment Rule Condition Object

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Assignment Rule Condition Record	Updating an Existing Assignment Rule Condition Record	Deleting an Existing Assignment Rule Condition Record
RuleNumber	The alternate identifier of the rule.	None	Required	Not Required	Not Required
RuleConditionNumber	The alternate identifier of the rule condition.	None	Required	Required	Required
Object	The object on which the condition rule will apply, such as Accounts, Opportunities, Lead, Deals, and Partner Account.	The object must correspond to the given rule.	Conditionally Required. Provide value if ObjectCode isn't provided.	Not Required	Not Required
ObjectCode	The code of the object.	The object must correspond to the given rule.	Conditionally Required. Provide value if ObjectCode isn't provided.	Not Required	Not Required
ObjectAttributeName	The attributes of the object.	The attribute must correspond to the given object and registered in assignment metadata.	Conditionally Required. Provide value if ObjectAttributeCode isn't provided.	Not Required	Not Required
ObjectAttributeCode	The code of the attributes of the objects.	The attribute must correspond to the given object	Conditionally Required. Provide value if	Not Required	Not Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Assignment Rule Condition Record	Updating an Existing Assignment Rule Condition Record	Deleting an Existing Assignment Rule Condition Record
		and registered in assignment metadata.	ObjectAttributeName isn't provided.		
Operator	The operation values according to which the rules would apply such as Equals, Start with, and so on.	The right operator must be passed on the attribute type. Validate the operator if matching object is passed.	Required	Not Required	Not Required
Value	The value to which the operation would match.	None	Conditionally Required. Not Mandatory in case the operator value is Is not blank or you're using Matching Object.	Not Required	Not Required

You can view the Assignment Rule Condition 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Assignment Rule condition object in the table and click Download.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the assignment rule condition information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Assignment Rule Condition from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Assignment Rule Data

You can use Import Management to create, update, or delete your assignment rule data.

You can import assignment rule records using these steps:

- Map your source data to Oracle Applications Cloud object attributes.
- Create source Comma Separated Values (CSV) file for import.
- Create the import activity.
- Review the import results.

How You Map Your Source Data to Target Object Attributes

You import assignment rule data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plans or are updating action plans that have source system reference data, then provide the source system and source system reference values.

Review Required Attributes and Validations for Assignment Rule Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for assignment rule records, prerequisite setup tasks and specific validations, if any:

Review Required Attributes and Validations for Assignment Rule Object

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Assignment Rule Record	Updating an Existing Assignment Rule Record	Deleting an Existing Assignment Rule Record
RuleSetNumber	The alternate identifier of the assignment rule set.	None	Required	Not Required	Not Required
RuleName	The name of the assignment rule.	A valid name must begin with a letter. The remaining characters in the name can be an alphanumeric character, a single space, colon (:), dash (-), period (.), slash (/), or underscore (_).	Required	Not Required	Not Required
RuleNumber	The alternate identifier of the assignment rule.	None	Not Required	Required	Required

You can view the Assignment Rule Set 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Assignment Rule Set object in the table and click Download.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the assignment rule set information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Assignment Rule Set from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Assignment Rule Set Data

You can use Import Management to create, update, and delete your assignment rule set data.

You can import assignment rule set records using these steps:

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

4. Review the import results.

How You Map Your Source Data to Target Object Attributes

You import assignment rule set data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plans or are updating action plans that have source system reference data, then provide the source system and source system reference values.

Review Required Attributes and Validations for Assignment Rule Set Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for assignment rule set records, prerequisite setup tasks and specific validations, if any:

Review Required Attributes and Validations for Assignment Rule Set Object

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Assignment Rule Set Record	Updating an Existing Assignment Rule Set Record	Deleting an Existing Assignment Rule Set Record
Application	The name of the application.	The application should be one of the following: Lead Management, Sales and Partner Center, Customer Center, Object Sharing, Service.	Required	Not Required	Not Required
Category	The display name of the rule category.	It should belong to the passed application or code will be given preference.	Conditionally Required. Provide value if CategoryCode isn't provided.	Not Required	Not Required
CategoryCode	The code of the rule category.	It should belong to the passed application or code will be given preference.	Conditionally Required. Provide value if Category isn't provided.	Not Required	Not Required
RuleSetNumber	The alternate identifier of the assignment rule set.	None	Not Required	Required	Required
RuleSetName	The name of the assignment rule set.	A valid name must begin with a letter. The remaining characters in the name can be an alphanumeric character, a single space, colon (:), dash (-), period (.), slash (/), or underscore (_). It must be unique for a particular application.	Required	Not Required	Not Required

You can view the Assignment Rule Set 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Assignment Rule Set object in the table and click Download.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the assignment rule set information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Assignment Rule Set from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Associated Project Data

You can use Import Management to create or update associated projects records.

To import associated project records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your associated projects data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 associated project object, the attribute is LinePUID.

Required Attributes and Validations for the Associated Project Object

To import data successfully into Oracle Applications 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 associated project records, prerequisite setup tasks for the attributes, and specific validations, if any, for associated project import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Associated Project Record	Updating an Existing Associated Project Record
LinePuid	The unique PUID that identifies the contract line	This must be a valid contract line PUID.	Required	Not required
ExtSource	The external source of the associated project information.	This must be a unique combination of external source and key.	Required	Required
ExtKey	The external key of the associated project information.	This must be a unique combination of external source and key.	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Associated Project Record	Updating an Existing Associated Project Record
ProjectId	The ID of the project being associated with the contract line.	This must be a valid project ID.	A value is required if the project number isn't passed.	Not required
ProjectNumber	The number of the project being associated with the contract line.	This must be a valid project number.	A value is required if the project ID isn't passed.	Not required
TaskId	The ID of the task being associated with the contract line.	This must be a valid task ID.	A value is required if the task number isn't passed.	Not required
TaskNumber	The number of the task being associated with the contract line.	This must be a valid task number.	A value is required if the task ID isn't passed.	Not required

You can view the associated project object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Associated Project** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Associated Project from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Attachment Data

You can use Import Management to create, update, or delete Attachment records.

You can import attachment records using these steps:

1. Map your source attachment data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the attachment data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import attachment data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the attachment import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For attachment object, the attribute is PartyNumber and shows up in the UI as Party Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new attachments or are updating attachments that have source system reference data, then provide the source system and source system reference values. For attachment object, these are SourceSystem and SourceSystemReferenceValue and show up as Party Source System and Party Source System Reference Value in the UI.

Required Attributes and Validations for Attachment Object

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

This table lists the required attributes for attachment records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Attachment record	Updating an Existing Attachment record
PK!Value	This is the primary key of the record to which the attachment is being associated.	When creating or updating attachments, the parent record to which the attachment is associated must exist in the database.	Either Pk1Value or PUID is mandatory.	Either Pk1Value or PUID is mandatory.
ObjectPUID	This is the public unique identifier of the record to which the attachment is being associated.	When creating or updating attachments, the parent record to which the attachment is associated must exist in the database.	Either Pk1Value or PUID is mandatory.	Either Pk1Value or PUID is mandatory.
Category	Category to which the attachment belongs. If you don't specify a value, the default is considered. For example, the default attachment category for lead is MKL_LEAD_ CATEGORY.A source system reference that's the unique ID of the Attachment in your legacy or external system.	If passing the category, it should be a valid category for that object.	Not required If you don't provide a value, the default is used.	Not required If you don't provide a value, the default is used.
Description	A brief description of the attachment.	This can be any string of specified length.	Not Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Attachment record	Updating an Existing Attachment record
FileName	Name of the attachment file in which the attachment is stored.	This can be any string of specified length.	Either the File name or the URL is mandatory.	Either the File name or the URL is mandatory.
PK2 Value	This is the primary key of the record to which the attachment is being associated.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.
PK3 Value	This is the primary key of the record to which the attachment is being associated.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.
PK4 Value	This is the primary key of the record to which the attachment is being associated.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.
PK5 Value	This is the primary key of the record to which the attachment is being associated.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.	This is useful when the object has a composite primary key.
URL	If the attachment type is url, this specifies the url.	The URL format is validated.	Either the file name or the URL is mandatory.	Either the file name or the URL is mandatory.

For more information on importing an attachment, see the topic Import Attachments in the related links section.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the attachment object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Attachment** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the attachment information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Attachment from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import attachments?

Import Your Bill Plan and Revenue Plan Data

You can use Import Management to create or update bill plan and revenue plan records.

To import bill plan and revenue plan records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your bill plan and revenue plan data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 bill plan and revenue plan object, the attribute is ContractPuid.

Required Attributes and Validations for the Bill Plan and Revenue Plan Object

To import data successfully into Oracle Applications 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 bill plan and revenue plan records, prerequisite setup tasks for the attributes, and specific validations, if any, for bill plan and revenue plan import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Bill Plan and Revenue Plan Record	Updating an Existing Bill Plan and Revenue Plan Record
ContractPuid	The PUID of the contract for which the bill plan or revenue plan is being created or updated.	This must be a valid contract PUID.	Required	Not required
ExtSource	The external source of the bill or revenue plan.	This must be a valid combination of external source and key.	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Bill Plan and Revenue Plan Record	Updating an Existing Bill Plan and Revenue Plan Record
ExtKey	The external key of the bill or revenue plan.	This must be a unique combination of external source and key.	Required	Required
BillPlanName	The bill plan or revenue plan name.	N/A	Required	Not required
BillMethodId	The bill or revenue method ID.	This must be a valid bill method ID.	Required if bill method name isn't passed.	Not required
BillMethodName	The bill or revenue method name.	This must be a valid bill method name.	Required if bill method ID isn't passed.	Not required
BillToCustAcctId	The bill-to customer account ID of the bill plan.	This must be a valid customer account ID.	Required if customer account name isn't passed.	Not required
BillToCustAcctNumber	The bill-to customer account number of the bill plan.	This must be a valid customer account number.	Required if customer account ID isn't passed.	Not required
BillToContactId	The bill-to contact ID of the bill plan.	This must be a valid contact ID.	Required if contact name isn't passed.	Not required
BillToContactName	The bill-to contact name of the bill plan.	This must be a valid contact name.	Required if contact ID isn't passed.	Not required
BillToSiteUseId	The bill-to site use ID of the bill plan	This must be a valid party site use ID.	Required if party site use location isn't passed.	Not required
BillToSiteUseLocation	The bill-to site use location of the bill plan.	This must be a valid party site use location.	Required if party site use ID isn't passed.	Not required
InvoiceCurrencyOptCode	The billing currency type code of the bill plan.	This must be a valid currency type code.	Required if the currency type name isn't passed.	Not required
InvCurrOptMeaning	The billing currency type name of the bill plan.	This must be a valid currency type name.	Required if the currency type code isn't passed.	Not required
BillingCycleId	The billing cycle ID of the bill plan.	This must be a valid billing cycle ID.	Required if the billing cycle name isn't passed.	Not required
BillingCycleName	The billing cycle name of the bill plan.	This must be a valid billing cycle name.	Required if the billing cycle ID isn't passed.	Not required
PaymentTermId	The payment terms ID.	This must be a valid payment terms ID.	Required if the payment terms name isn't passed.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Bill Plan and Revenue Plan Record	Updating an Existing Bill Plan and Revenue Plan Record
PaymentTermName	The payment terms name.	This must be a valid payment terms name.	Required if the payment terms ID isn't passed.	Not required
BillSetNum	The bill set of the bill plan.	N/A	Required	Not required
LaborInvoiceFormatId	The labor format ID of the bill plan.	This must be a valid labor format ID.	Required if the labor format name isn't passed.	Not required
LaborInvoiceFormatName	The labor format name of the bill plan.	This must be a valid labor format name.	Required if the labor format ID isn't passed.	Not required
NlInvoiceFormatId	The nonlabor format ID of the bill plan.	This must be a valid nonlabor format ID.	Required if the nonlabor format name isn't passed.	Not required
NlInvoiceFormatName	The nonlabor format name of the bill plan.	This must be a valid nonlabor format name.	Required if the nonlabor format ID isn't passed.	Not required
EventsInvoiceFormatId	The event format ID of the bill plan.	This must be a valid event format ID.	Required if the event format name isn't passed.	Not required
EventsInvoiceFormatName	The event format name of the bill plan.	This must be a valid event format name.	Required if the event format ID isn't passed.	Not required

You can view the bill plan and revenue plan object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Bill Plan and Revenue Plan** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Bill Plan and Revenue Plan from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Billing Control Data

You can use Import Management to create or update billing control records.

To import billing control records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your billing control data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 billing control object, the attribute is ContractPuid.

Required Attributes and Validations for the Billing Control Object

To import data successfully into Oracle Applications 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 billing control records, prerequisite setup tasks for the attributes, and specific validations, if any, for billing control import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Billing Control Record	Updating an Existing Billing Control Record
ContractPuid	The PUID of the contract with which the billing control is being associated.	This must be a valid contract PUID.	Required if the contract line PUID isn't passed.	Not required
LinePuid	The PUID of the contract line with which the billing control is being associated.	This must be a valid contract line PUID.	Required if the contract PUID isn't passed.	Not required
ExtSource	The external source of the billing control.	This must be a unique combination of external source and external key.	Required	Required
ExtKey	The external key of the billing control.	This must be a unique combination of external source and external key.	Required	Required
RbsElementId	The ID of the billing control element.	This must be a valid element ID.	Required if element name isn't passed.	Not required
RbsElementAlias	The name of the billing control element.	This must be a valid element name.	Required if element ID isn't passed.	Not required

You can view the billing control object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Billing Control** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Billing Control from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Business Plan Data

You can use Import Management to create, update, or delete your business plan data.

You can import business plan records using these steps:

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

How You Map Your Source Data to Target Object Attributes

To import your Business Plan data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records. For example, when importing the address of an account, ensure the account exists.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Business Plan object, this attribute is BusinessPlanId.
- **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 BusinessPlan object, the attribute is BusinessPlanNumber.

Review Required Attributes and Validations for Business Plan Object

To import data successfully into Oracle Applications 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 Business Plan records, required attributes for updating Business Plan records, prerequisite setup tasks for the attributes, and specific validations, if any, for Business Plan import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Business Plan record	Updating an Existing Business Plan record
BusinessPlanId	Unique Identifier	Long	18	None	Not required	Required
BusinessPlanNumbe	Public Unique Identifier	String	64	None	Not required	A value is required either for BusinessPlanId or for BusinessPlanNumber.
PeriodTypeCode	Period Type such as Year, Quarter, or Period	String	30	Use the **Manage Calendar Profile Option** task to set a value for ZCA_COMMON_ CALENDAR.	Required	Not Required
StatusCode	Status of the BusinessPlan such as ORA_DRAFT, ORA_APPROVED	String	30	None	Required	Not required.
PeriodEndDisplayNa	End Period Display Name	String	60	None	Required	Not required.
PeriodStartDisplayN	Start Period Display Name	String	60	None	Required	Not required.
Name	Unique name of the business plan	String	60	Enter a unique value.	Required	Not required.
BusinessPlanClassC	Class of the business plan such as Account or Partner	String	20	Navigate to the following in the Setup and Maintenance Work area:	Required	Not required.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Business Plan record	Updating an Existing Business Plan record
				• Offering: Sales • Functional Area: Data Import and Export • Task: Manage Business Plan Classes The default value is PARTNER.		
PartnerId	Internal identifier of the Partner	Long	18	Enter the PartnerId if you select the BusinessPlanClassC as PARTNER.	A value is required, if you don't specify the PartnerNumber.	Not required
PartnerNumber	Public unique identifier of the Partner	String	30	Enter the PartnerId if you select the BusinessPlanClassC as PARTNER.	A value is required, if you don't specify the PartnerId.	Not required
CustomerId	Internal identifier of the Account	Long	18	Enter the PartnerId if you select the BusinessPlanClassC as PARTNER.	A value is required, if you don't specify the CustomerNumber.	Not required
CustomerNumber	Public unique identifier of the Account	String	30	Enter the CustomerId or the CustomerNumber, if you select the BusinessPlanClassC as ACCOUNT.	A value is required, if you don't specify the CustomerId.	Not required

You can view the Business Plan 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Business Plan from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?

Import Your Business Plan SWOT Data

You can use Import Management to create, update, or delete your business plan SWOT data.

To import Business Plan SWOT records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Business Plan SWOT data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records. For example, when importing the address of an account, ensure the account exists.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Business Plan SWOT object, this attribute is SWOTId.
- **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 BusinessPlan SWOT object, the attribute is SWOTNumber.

Required Attributes and Validations for Business Plan SWOT Object

To import data successfully into Oracle Applications 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 Business Plan SWOT records, required attributes for updating Business Plan SWOT records, prerequisite setup tasks for the attributes, and specific validations, if any, for Business Plan SWOT import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Business Plan SWOT Record	Updating an Existing Business Plan SWOT Record
SWOTTypeCode	Identifies one of the four seeded and not extensible SWOT type codes: • STRENGTH • WEAKNESS • OPPORTUNITY • THREAT	String	30	None	Required	Not required
SWOTDescription	A brief description of the SWOT types	String	2000	None	Required	Not required
SWOTId	Unique identifier of the SWOT	Long	18	None	Not required	Required
SWOTNumber	A unique number that identifies the SWOT record	String	64	None	Not required	Either the SWOTNumber or the SWOTId is required to update the records.
BusinessPlanId	The primary key of the parent record	Long	18	None	A value is required to define to which business plan this child record of the SWOT belongs.	Not required.
BusinessPlanNumber	A unique number that identifies the business plan	String	64	None	A value is required either for the BusinessPlanId or for the BusinessPlanNumber	Not required.

You can view the Business Plan SWOT 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 file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

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

1. In the **Navigator**, under **Tools**, click **Import Management**.
2. Click **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. You can attach different types of files, giving each file a specific description.

Description	SWOTTypeCode	BusinessPlanNumber
swot description	THREAT	myBP_0173

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Business Plan SWOT** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- How do I import data?

Import Your Business Plan Team Data

Use this topic to import Business Plan Team data into Oracle Applications Cloud. You can use the import functionality to create or update Business Plan Team records.

To import Business Plan Team records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Business Plan Team data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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. 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 Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Business Plan Team object, this attribute is BusinessPlanResourceId.
- **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 Business Plan Team object, the attribute is BusinessPlanResourceNumber.

Required Attributes and Validations

To import data successfully into Oracle Applications 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 Business Plan Team records, required attributes for updating Business Plan Team records, prerequisite setup tasks for the attributes, and specific validations, if any, for Business Plan Team import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Business Plan Team Record	Updating an Existing Business Plan Team Record
ResourceId	Specifies the resource added to the business team plan	Long	18	None	Required	Not required
BusinessPlanId	Specifies the parent record ID for which this child record is being created	Long	18	None	Required	Not required
BusinessPlanResour	A unique number that identifies the business plan	String	230	None	Not required	Required
ResourceNumber	A unique identifier that identifies the resource (team member) number	String	30	None	Either the ResourceNumber or the ResourceId is required when creating a record.	Not required.
BusinessPlanResour	The unique identifier of the business plan	Long	18	None	Not required	Either the BusinessPlanResourceId or the BusinessPlanResourceNumbe is required to update the records.
BusinessPlanNumb	A unique number that identifies the business plan	String	64	None	Either the BusinessPlanResour or the BusinessPlanResour is required to create the records.	Not required.

You can view the Business Plan Team 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 file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

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

1. In the **Navigator**, under **Tools**, click **Import Management**.
2. Click **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. You can attach different types of files, giving each file a specific description.

MemberFunctionCode	ResourceId	BusinessPlanNumber
ORA_BUS_DEVELOPMENT	100010032635399	myBP_0173

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Business Plan Team** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.

2. 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.
3. 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.

Related Topics

- How do I import data?

Import Your Campaign Data

You can use Import Management to create or update Campaign records.

To import Campaign records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Campaign data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Campaign Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Campaign records, required attributes for updating Campaign records, prerequisite setup tasks for the attributes, and specific validations, if any, for Campaign import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Campaign Record	Updating an Existing Campaign Record
CreatedByModule	The module used to create the campaign.	By default, Web Service module is used to create the campaign.	Not Required	Not Required
OwnerId	The unique identifier of the campaign owner.	The party must exist. Export the Party object to determine the PartyId of a person.	Not Required	Not Required
OwnerPartyName	The party name of the owner.	The party must exist. Export the Party object to determine the PartyName of a person.	Not Required	Not Required
OwnerPartyNumber	The party number of the owner.	The party must exist. Export the Party object to determine the PartyNumber of a person.	Not Required	Not Required
ParentCampaignNumber	The public unique identifier of the parent campaign.	Export the Campaign records to identify the CampaignNumber of the parent campaign.	Not Required	Not Required
Status	The status of the campaign.	The default value is Draft.	Not Required	Not Required
CampaignId	The unique identifier of the campaign.	No validation	Not Required	Either CampaignId or CampaignNumber is required.
CampaignName	The name of the campaign.	No validation	Required	Not Required
CampaignNumber	The PUID of the campaign.	No validation	Not Required	Required

You can view the Campaign 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.

Note: Create your campaign data in Eloqua and then synchronize to Sales to maintain consistency of data.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Campaign** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Campaign from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Campaign Member Data

You can use Import Management to create or update Campaign Member records.

To import Campaign Member records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Campaign Member data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Campaign Member Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Campaign Member records, required attributes for updating Campaign Member records, prerequisite setup tasks for the attributes, and specific validations, if any, for Campaign Member import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Campaign Member Record	Updating an Existing Campaign Member Record
CampaignMemberId	The primary key of the campaign member.	No Validation	Required Auto-generated	Either CampaignMemberId or CampaignMemberNumber is required.
CreatedByModule	The module used to create the campaign member.	No Validation	Not Required	Not Required
CampaignCampaignNumber	The Campaign PUID associated with the campaign member row.	Identify the Campaign Number by exporting the Campaign objects.	Not Required	Not Required
MemberResponseDate	The date when the campaign member responded to the campaign.	No Validation	Required	Required
ContactPartyNumber	The contact party number of the campaign member.	Identify the Party Number for Contact by exporting the Contact party associated with the campaign member. Either provide the Lead Number or Contact Number value.	Required	Required
LeadLeadNumber	The lead number for the campaign member.	Identify the Party Number for Lead by exporting the Lead party associated with the campaign member. Either provide the LeadNumber or the Contact Number.	Required	Required
CampaignId	The unique identifier of the campaign.	Identify the Campaign Id by exporting the Campaign objects.	Required	Required
CampaignNumber	The PUID of the campaign.	Identify the Campaign Number by exporting the Campaign objects.	Not Required	Not Required
CampaignMemberNumber	The PUID of the campaign member.	No Validation	Not Required	Required

You can view the Campaign 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Campaign Member** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Campaign Member from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**.
   You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Case Data

You can use Import Management to create update, or delete Case records.

To import Case records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Case data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Case Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Case records, required attributes for updating Case records, prerequisite setup tasks for the attributes, and specific validations, if any, for Case import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Record	Updating an Existing Case Record
CaseId	Indicates the case identifier	A valid primary key in the destination system. Either the CaseNumber or the CaseId should be entered. If both are entered, the CaseId is preferred.	Not required This is auto generated.	Optional Either the CaseNumber or the CaseId is required.
StatusTypeCd	Indicates the status type of the case	A valid value is required.	Optional The default value is ORA_ SVC_ACTIVE.	Optional
StripeCd	Indicates the stripe code for the case	A valid value is required. The Lookup code that indicates the stripe code such as CRM, HCM, or PRM	Optional The default value is ORA_ SVC_CRM.	Not required
StatusCd	Indicates the status of the case	A valid value is required.	Optional The default value is ORA_ SVC_NEW.	Optional
PrimaryContactPartyNumbe	The alternate key of the case primary contact	A valid PUID for the PrimaryContactPartyNumbe in the destination system	Optional	Optional
PrimaryHouseholdPartyNam	Indicates the name of the case primary household	A valid unique name in the destination system	Optional	Optional
PrimaryHouseholdPartyNum	The alternate key of the case primary household	A valid PUID for the PrimaryHouseholdPartyNum in the destination system	Optional	Optional
QueueName	The name of the queue associated with the case	A valid unique name in the destination system	Optional	Optional
QueueNumber	The alternate key of the queue associated to the case	A valid unique name in the destination system	Optional	Optional
ReportedByPartyNumber	The alternate key of the user who reported the case	A valid PUID for ReportedByPartyNumber in the destination system	Optional	Optional
LastUpdatedByPartyNumbe	The alternate key of the user who last updated the case	A valid unique name in the destination system	Optional	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Record	Updating an Existing Case Record
Title	Indicates the title of the case	No validation	Required	Optional
AssigneePartyName	Indicates the party name of the case assignee	A valid unique name in the destination system	Optional	Optional
AssigneePartyNumber	The alternate key of the case assignee	A valid PUID for AssigneePartyNumber in the destination system	Optional	Optional
CategoryName	Indicates the name of the category associated with the case	A valid value in the destination system	Required	Not required
PrimaryContactPartyName	Indicates the name of the case primary contact	A valid unique name in the destination system	Optional	Optional
CaseCategoryId	Indicates the category of the case	A valid CaseCategoryId in the destination system	Optional	Optional
CreatedByPartyNumber	The alternate key of the user who created the case	A valid CreatedByPartyNumber for the case row in the destination system	Required	Not required
CaseNumber	Indicates the reference number of the case	A valid PUID for the case row in the destination system	Optional If required, provide the PUID for the source and destination systems.	Required

You can view the Case 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Case** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Case from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Case Contact Data

You can use Import Management to create update, or delete Case Contact records.

To import Case Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Case Contacts or are updating Case Contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Case Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Case Contact records, required attributes for updating Case Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Case Contact import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Contact Record	Updating an Existing Case Contact Record
CaseContactId	Indicates the case contact identifier	A valid Id for the CaseContact row in the destination system	Not required	Required
PartyId	Indicates the PartyId of the contact	A valid PUID for the PartyId in the destination system	Required A valid value is required either for the PartyId or the ContactPartyNumber in the destination system	Required A valid value is required either for the PartyId or the ContactPartyNumber in the destination system
ContactPartyNumber	Indicates the party number of the contact	A valid PUID for the ContactPartyNumber in the destination system	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Contact Record	Updating an Existing Case Contact Record
			A valid value is required either for the PartyId or the ContactPartyNumber in the destination system	A valid value is required either for the PartyId or the ContactPartyNumber in the destination system
PartyName	Indicates the party Id of the contact	A valid PUID for the PartyName in the destination system	Required A valid value is required either for the PartyId or the PartyName in the destination system. If both values exist, the PartyId is considered.	Required A valid value is required either for the PartyId or the PartyName in the destination system. If both values exist, the PartyId is considered.
CaseId	Indicates the case to which this contact is associated	A valid CaseId in the destination system	Not required	Not required
CaseNumber	Indicates the case number to which this contact is associated	A valid CaseNumber in the destination system	Not required	Not required

You can view the Case Contact 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Case Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Case Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.

6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Case Household Data

You can use Import Management to create update, or delete Case Household records.

To import Case Household records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Case Household data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Case Households or are updating Case Households that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Case Household Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Case Household records, required attributes for updating Case Household records, prerequisite setup tasks for the attributes, and specific validations, if any, for Case Household import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Household Record	Updating an Existing Case Household Record
CaseHouseholdId	Indicates the case household identifier	A valid Id for the CaseHousehold row in the destination system	Not required	Required
PartyId	Indicates the PartyId of the household	A valid PUID for the PartyId in the destination system	Required A valid value is required either for the PartyId or the HouseholdPartyNumber in the destination system	Required A valid value is required either for the PartyId or the HouseholdPartyNumber in the destination system
HouseholdPartyNumber	Indicates the party number of the household	A valid PUID for the HouseholdPartyNumber in the destination system	Required A valid value is required either for the PartyId or the HouseholdPartyNumber in the destination system	Required A valid value is required either for the PartyId or the HouseholdPartyNumber in the destination system
HouseholdName	Indicates the name of the household	A valid unique HouseholdName in the destination system	Required A valid value is required either for the PartyId or the HouseholdName in the destination system. If both values exist, the PartyId is considered.	Required A valid value is required either for the PartyId or the HouseholdName in the destination system. If both values exist, the PartyId is considered.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Household Record	Updating an Existing Case Household Record
CaseId	Indicates the case to which this household is associated	A valid CaseId in the destination system	Not required	Not required
CaseNumber	Indicates the case number to which this household is associated	A valid CaseNumber in the destination system	Not required	Not required

You can view the Case Household 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Case Household** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Case Household from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Case Message Data

You can use Import Management to create update, or delete Case Message records.

To import Case Message records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Case Message data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Case Messages or are updating Case Messages that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Case Message Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Case Message records, required attributes for updating Case Message records, prerequisite setup tasks for the attributes, and specific validations, if any, for Case Message import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Message Record	Updating an Existing Case Message Record
LastEditedDate	Indicates the last edited date of the message for the case	No validation	Not required	Not required
MessageId	Indicates the case message identifier	A valid Id for the MessageId row in the destination system	Not required	Required
MessageTypeCd	Lookup code that indicates the type of message	A valid unique MessageTypeCd in the destination system	Required	Not required
OriginationDate	Indicates the date on which the message was posted	No validation	Not required	Not required
PostedByPartyNumber	Indicates the party number of the user who posted the message	A valid PUID for the PostedByPartyNumber in the destination system	Optional	Optional
RichTextFlag	Indicates whether the message content is in rich text format (Y or N)	A valid value from the lookup Y_N	Required	Optional
VisibilityCd	Lookup code that indicates the visibility of a message	A valid value in the destination system	Optional The default value is ORA_ SVC_INTERNAL.	Not required
StatusCd	Lookup code that indicates the status of the message	A valid value in the destination system	Required	Optional
CaseId	Indicates the case to which this message is associated	A valid CaseId in the destination system	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Message Record	Updating an Existing Case Message Record
CaseNumber	Indicates the case number to which this message is associated	A valid CaseNumber in the destination system	Not required	Not required
MessageNumber	Indicates the reference number of the message ID	A valid MessageNumber in the destination system	Not required	Not required

You can view the Case Message 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Case Message** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Case Message from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Case Opportunity Data

You can use Import Management to create update, or delete Case Opportunity records.

To import Case Opportunity records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Case Opportunity data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Case Opportunities or are updating Case Opportunities that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Case Opportunity Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Case Opportunity records, required attributes for updating Case Opportunity records, prerequisite setup tasks for the attributes, and specific validations, if any, for Case Opportunity import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Opportunity Record	Updating an Existing Case Opportunity Record
CaseOpportunityId	Indicates the case opportunity identifier	A valid identifier for the CaseOpportunityId row in the destination system	Not required	Required
OptyId	Indicates the opportunity associated with the case	A valid PUID for the OptyId in the destination system	Required A valid value is required either for the OptyId or the OptyNumber in the destination system. If both values are present, the OptyId is considered.	Required A valid value is required either for the OptyId or the OptyNumber in the destination system. If both values are present, the OptyId is considered.
OptyNumber	Indicates the opportunity number of the case opportunity	A valid PUID is required for OptyNumber in the destination system	Required A valid value is required either for the OptyId or the OptyNumber in the destination system. If both values are present, the OptyId is considered.	Required A valid value is required either for the OptyId or the OptyNumber in the destination system. If both values are present, the OptyId is considered.
CaseNumber	Indicates the case number to which this case opportunity is associated	A valid CaseNumber in the destination system	Not required	Not required
CaseId	Indicates the case to which this case opportunity is associated	A valid CaseId in the destination system	Not required	Not required

You can view the Case Opportunity 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Case Opportunity** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Case Opportunity from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Case Resource Data

You can use Import Management to create update, or delete Case Resource records.

To import Case Resource records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (CSV) file for import.

3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

To import your Case Resource data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Case Resources or are updating Case Resources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Case Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Case Resource records, required attributes for updating Case Resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for Case Resource import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Resource Record	Updating an Existing Case Resource Record
CaseResourceId	Indicates the case resource identifier	A valid identifier for the CaseOpportunityId row in the destination system	Not required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Case Resource Record	Updating an Existing Case Resource Record
PartyId	Indicates the party identifier of the resource	A valid PUID for PartyId in the destination system	Required A valid value is required either for the PartyId or the ResourcePartyNumber in the destination system. If both values are present, the PartyId is considered.	Required A valid value is required either for the PartyId or the ResourcePartyNumber in the destination system. If both values are present, the PartyId is considered.
ResourcePartyNumber	Indicates the party number of the resource	A valid PUID for the ResourcePartyNumber in the destination system	Required A valid value is required either for the PartyId or the ResourcePartyNumber in the destination system. If both values are present, the PartyId is considered.	Required A valid value is required either for the PartyId or the ResourcePartyNumber in the destination system. If both values are present, the PartyId is considered.
ResourceName	Indicates the name of the resource	A valid unique ResourceName in the destination system	Required A valid value is required either for the PartyId or the ResourcePartyNumber in the destination system. If both values are present, the PartyId is considered.	Required A valid value is required either for the PartyId or the ResourcePartyNumber in the destination system. If both values are present, the PartyId is considered.
CaseId	Indicates the case to which this resource is associated	A valid CaseId in the destination system	Not required	Not required
CaseNumber	Indicates the case number of the case to which the resource is associated	A valid CaseNumber in the destination system	Not required	Not required

You can view the Case Resource 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Case Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Case Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

How do I import my category data?

You can use Import Management to create, update, or delete your category data.

You can import category records using these steps:

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

How You Map Your Source Data to Target Object Attributes

You import category data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.

- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You've completed all the prerequisites for importing each attribute in your source data.
- You've all parent records in place before importing child records.

Review Required Attributes and Validations for Category Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for category records, prerequisite setup tasks and specific validations, if any:

Review Required Attributes and Validations for Category Object

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Category Record	Updating an Existing Category Record	Deleting an Existing Category Record
CategoryId	The unique identifier of the category, an auto generated number and primary key for this table.	Must be a valid CategoryId when updating a category.	Not Required	Conditionally Required. Provide value if CategoryCode isn't provided.	Conditionally Required. Provide value if CategoryCode isn't provided.
CategoryCode	The public unique identifier of the category.	Must be unique across all business units and application stripes.	Required	Conditionally Required. Provide value if CategoryId isn't provided.	Conditionally Required. Provide value if CategoryId isn't provided.
CategoryName	The name of the category. This field is displayed in the service request UI.	None	Required	Not Required	Not Required
CategoryShortName	A short code for the category.	This field is automatically set with the same value as the CategoryCode.	Not Required	Not Required	Not Required
StripeCd	The application stripe of the category.	Must be one of the following values: ORA_SVC_CRM, ORA_SVC_HCM, ORA_SVC_HRHD, ORA_SVC_ISR.	Conditionally Required. Provide value if you don't want the default value of ORA_SVC_CRM.	Not Required	Not Required
BUOrgId	The unique identifier of the business unit associated with the category.	Manage Business Units under Setup and Maintenance.	Required	Not Required	Not Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Category Record	Updating an Existing Category Record	Deleting an Existing Category Record
ParentCategoryId	The unique identifier of the parent category.	Parent category must exist in the application.	Conditionally Required. Provide value if importing a child category and ParentCategoryCode isn't provided.	Not Required	Not Required
ParentCategoryCode	The public unique identifier of the parent category.	Parent category must exist in the application.	Conditionally Required. Provide value if importing a child category and ParentCategoryId isn't provided.	Not Required	Not Required

You can view the Category 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.

Note:
1. If you're importing child categories, you must make sure that the parent category already exists in the application.
2. To import category name for non primary languages, you must change the session language before importing. You can change the session language by navigating to **Settings and Actions** > **Set Preferences** > **Language and Changing the Value for the Current Session.**

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Category object in the table and click Download.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After the CSV file is ready, create an import activity to import the category information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select **Category** from the Object drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You'd see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**.
7. Click **Next**.
8. Review the import details on the Review and Submit page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

How do I import classification data?

You can use Import Management to create, update, or delete your classification data.

You can import classification records using these steps:

1. Map your source classification data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the classification data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import classification data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

If you want to import only a few records, then you can create a single CSV file for all classification attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the classification child objects. Note that you must have imported the CSV file for classification object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new classifications or are updating classifications that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Classification Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for classification records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
PartySourceSystem	The code representing the source system for the party(account, contact, household, or legal entity) to which the Classification belongs.	Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in the same batch as this Classification.	Conditionally required Provide one of the following : • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile.	Optional
PartySourceSystemReferenc	The reference number or text representing the source system unique ID for the party (account, contact, household, or legal entity) to which the classification belongs.	Identify the reference value from your source system that was used when you imported the party in a prior batch, or identify the source system reference that you will use when importing the party in the same batch as this classification.	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef system code and source system	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
			reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile)	
PrimaryFlag	Identifies primary classification for the parent party record.	Only one of the child records can be Primary.	Optional	Optional Pass Y to set Primary and N to reset an existing primary record.
CodeAssignmentId	The unique identifier for the customer classification assignment.	It should be a valid existing value.	Not required	Either the Code assignment Id or a combination of Source System and Source System Reference is required.
ClassCategory	The classification category name	The class category must exist. You can manage class categories from the Manage Class Categories task.	Required A value is required if creating a new classification association record.	Not Required
ClassCode	The classification code, within the classification category, assigned to the party.	The value must be a valid code for the classification category. You can only assign one code if the category definition isn't enabled for multiple code assignments to a party within the same category. The code assignment must not already exist within the same time period. You can obtain classification codes for a classification category.	Conditionally required A value is required if creating a new classification association record.	Not Required
StartDateActive	The date on which the classification becomes valid.	This should be a valid date.	This defaults to the current date.	Not required
PartyId	The internal ID for the party (account, contact, household, or legal entity) to which the address belongs	Identify the party ID value by exporting the relevant Party object such as Account, Contact, and so on.	Conditionally required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID)	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
			• PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile. • Party Number (public unique identifier for an organization profile)	
PartyNumber	The public unique identifier of the party record to which the classification category and classification code are associated.	The party number must exist.	Conditionally Required Provide reference information to identify the existing party. The reference information can be: • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile • Party Number (public unique identifier for an organization profile)	Not required
EndDateActive	The date on which the classification code is no longer valid.	This should be a valid date.	Optional	Not required
SourceSystem	Name of external source system of the account, contact or household with which the address is associated.	The source system should exist. You can manage source systems from the Manage Source Systems task.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required
SourceSystemReferenceValu	Specifies the identifier in the original source system	The combination of Source System and Source System Reference Value should be unique.	Optional If the source of your data is a third party or	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
			external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the classification object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Classification** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the classification information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Classification** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Classification Code Data

You can use Import Management to create or update Classification Code records.

To import Classification Code records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Classification Code data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Required Attributes and Validations for the Classification Code Object

To import data successfully into Oracle Applications 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 Classification Code records, prerequisite setup tasks for the attributes, and specific validations, if any, for Classification Code import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Code Record	Updating an Existing Classification Code Record
ClassCategory	User-defined classification category	No validation	Required	You can't update the ClassCategory. However, it's required to identify the existing data.
ClassCode	User defined class codes for the user defined class category	No validation	Required	You can't update the ClassCode. However, it's required to identify the existing data.
Description	Brief description of the classification code	No validation	Required	Required
Meaning	The meaning of the classification code	No validation	Required	Required
ModifyHierarchy	Option to indicate if the parent and child hierarchies of the classification codes are to be modified	No validation	Optional	Not required
ParentClassCode	If there is a hierarchy set between the classification codes, then provide the parent classification code to which the child classification code belongs.	User- defined ClassCategory via the "Manage Classification Categories" UI.	Optional	Not required

You can view the Classification Code object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Classification Code** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Classification Code from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Condition Attachment Data

You can use Import Management to create, update, or delete Public Sector Condition Attachment records.

To import Public Sector Condition Attachment records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Public Sector Condition Attachment data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.

- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Public Sector Condition Attachment Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Public Sector Condition Attachment records, required attributes for updating or deleting Public Sector Condition Attachment records, prerequisite setup tasks for the attributes, and specific validations, if any, for Public Sector Condition Attachment import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Public Sector Condition Attachment Record	Updating an Existing Public Sector Condition Attachment Record	Deleting an Existing Public Sector Condition Attachment Record
CoaPuid	The unique PUID that identifies the migrated condition of approval.	This must be a valid PUID.	Required	Required	Required
AttachmentPuid	The unique PUID that identifies the migrated condition of approval attachment.	This must be a unique PUID.	Required	Not Required	Not Required
FileName	Name of the attachment file in	This can be any string of specified length.	Required	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Public Sector Condition Attachment Record	Updating an Existing Public Sector Condition Attachment Record	Deleting an Existing Public Sector Condition Attachment Record
	which the attachment is stored.				
MigratedDataFlag	Indicates if the comment is migrated from legacy system.	This value must be Y if the data is migrated from legacy system.	Required	Not Required	Not Required
Description	A brief description of the attachment.	This can be any string of specified length.	Required	Not Required	Not Required

You can view the Public Sector Condition Attachment object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Public Sector Condition Attachment** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Public Sector Condition Attachment** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Condition of Approval Comment Data

You can use Import Management to create, update, or delete Public Sector Condition of Approval Comment records.

To import Condition of Approval Comment records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Condition of Approval Comment data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Condition of Approval Comment Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Public Sector Condition of Approval Comment records, required attributes for updating or deleting Public Sector Condition of Approval Comment records, prerequisite setup tasks for the attributes, and specific validations, if any, for Condition Approval Comment import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Condition of Approval Comment Record	Updating an Existing Condition of Approval Comment Record	Deleting an Existing Condition of Approval Comment Record
CoaPuid	The unique PUID that identifies the migrated condition of approval.	This must be a valid PUID.	Required	Required	Required
CommentPuid	The unique PUID that identifies the migrated condition of approval comment,	This must be a unique PUID.	Required	Not Required	Not Required
CommentText	The comment entered at the time of resolution.	None	Required	Not Required	Not Required
MigratedDataFlag	Indicates if the comment is migrated from legacy system.	This value must be Y if the data is migrated from legacy system.	Required	Not Required	Not Required
Visibility	Indicates if the visibility of comments.	This must be a Y or N.	Required	Not Required	Not Required

You can view the Public Sector Condition of Approval Comment object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Public Sector Condition of Approval Comment** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Public Sector Condition of Approval Comment** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Condition of Approval Transaction Data

You can use Import Management to create, update, or delete Public Sector Condition of Approval Transaction records.

To import Public Sector Condition of Approval Transaction records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Public Sector Condition of Approval Transaction data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Public Sector Condition of Approval Transaction Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Public Sector Condition of Approval Transaction records, required attributes for updating or deleting Public Sector Condition of Approval Transaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for Public Sector Condition of Approval Transaction import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Public Sector Condition of Approval Transaction Record	Updating an Existing Public Sector Condition of Approval Transaction Record	Deleting an Existing Public Sector Condition of Approval Transaction Record
CoaPuid	The unique PUID that identifies the migrated condition of approval.	This must be a valid PUID.	Required	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Public Sector Condition of Approval Transaction Record	Updating an Existing Public Sector Condition of Approval Transaction Record	Deleting an Existing Public Sector Condition of Approval Transaction Record
LnpRecordPuid	The unique PUID of the planning and zoning application.	This must be a unique in all planning and zoning application.	Required	Required	Required
ConditionType	The identifier of the type of the condition.	This must be a valid condition type.	Required	Not Required	Not Required
CategoryId	The identifier of the type of the category.	This must be a valid category.	Required	Not Required	Not Required
SubcategoryId	The identifier of the type of the subcategory.	This must be a valid subcategory.	Required	Not Required	Not Required
Condition	The identifier of the type of the condition.	None	Required	Not Required	Not Required
Status	The status of the condition of approval.	This must be a valid status.	Required	Not Required	Not Required
PrintSeq	Indicates the print sequence of the condition.	This must be a number value.	Required	Not Required	Not Required

You can view the Public Sector Condition of Approval Transaction object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Public Sector Condition of Approval Transaction** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Public Sector Condition of Approval Transaction** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Condition Comply Period Data

You can use Import Management to create, update, or delete Public Sector Condition Comply Period records.

To import Condition Comply Period records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Condition Comply Period data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Condition Comply Period Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Condition Comply Period records, required attributes for updating or deleting Condition Comply Period records, prerequisite setup tasks for the attributes, and specific validations, if any, for Condition Comply Period import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Condition Comply Period Record	Updating an Existing Condition Comply Period Record	Deleting an Existing Condition Comply Period Record
CoaPuid	The unique PUID that identifies the migrated condition of approval.	This must be a valid PUID.	Required	Required	Required
CoaTransComplyPuid	The unique PUID that identifies the migrated condition of approval transaction complies.	This must be a valid PUID	Required	Not Required	Not Required
ComplyPrdId	The identifier of the compliance associated with the conditions of approval.	This must be a valid comply ID	Required	Not Required	Not Required
Status	The status of the condition of approval.	This must be a valid status	Required	Not Required	Not Required
Comments	The comment entered at the time of resolution.	None	Required	Not Required	Not Required
EnabledFlag	Indicates if the compliance is	This must be a Y or N	Required	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Condition Comply Period Record	Updating an Existing Condition Comply Period Record	Deleting an Existing Condition Comply Period Record
	applicable to the conditions of approval.				

You can view the Condition Comply Period object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Public Sector Condition Comply Period** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Public Sector Condition Comply Period** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

How do I import compensation plan data?

You can use Import Management to create and update Compensation Plan records.

To import Compensation Plan Record records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Compensation Plan data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Compensation Plan Record Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for creating and updating Compensation Plan records, prerequisite setup tasks for the attributes, and specific validations, if any, for Compensation Plan Record import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Compensation Plan Record	Updating an Existing Compensation Plan Record
Name	The name of the compensation plan.	None	Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Compensation Plan Record	Updating an Existing Compensation Plan Record
CompensationPlanID	The unique identifier of the Compenstaion Plan generated internally.	None	Not Required	Required
ApprovalStatus	The status of the compensation plan in the approval process.	Possible values include APPROVED, NOT_ APPROVED, PENDING, and REJECTED. Default value is NOT_APPROVED. A list of acceptable values is defined in the lookup CN_PLAN_ APPR_STATUS.	Required	Not Required
AllowCreditCategoryOverlap	Indicates whether a credit category can exist in multiple plan components within the compensation plan.	Possible values include N, or FALSE, and Y, or TRUE. The default value is FALSE. A list of acceptable values is defined in the lookup CN_ ECAT_OVERLAP_FLAG.	Required	Not Required
OrgId	The unique ID of the business unit to which the compensation plan belongs.	Must be a valid business unit ID.	Required	Required
EndDate	The date on which the compensation plan becomes inactive.	Must be a valid date.	Required	Not Required
Description	Description of the compensation plan.	None	Not Required	Not Required
DisplayName	The name of the compensation plan that is displayed on the sales representative's user interface.	None	Not Required	Not Required
PlanDocumentTemplate	The name of the report template used to create a compensation plan.	None	Not Required	Not Required
TargetIncentive	The expected earnings (variable compensation) of a participant when all the objectives or goals in a plan are met. The default value is 0.	None	Not Required	Not Required

You can view the Compensation Plan object and 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: Before importing compensation plan, you must ensure that the compensation plan's status matches (per business logic) the performance measure's status. For example, a compensation plan with status **Complete** can't have a performance measure with status as **Incomplete** .

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Compensation Plan** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compenstation Plan Flexifield from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Compensation Plan Component Data

You can use Import Management to create and update Compensation Plan Component records.

To import Compensation Plan Component records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Compensation Plan Component data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Compensation Plan Component Object

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

This table lists the required attributes for creating and updating Compensation Plan Component records, prerequisite setup tasks for the attributes, and specific validations, if any, for Compensation Plan Component Record import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Compensation Plan Component Record	Updating an Existing Compensation Plan Component Record
CompensationPlanCompone	The unique identifier generated internally	None	Not Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Compensation Plan Component Record	Updating an Existing Compensation Plan Component Record
	that associates a plan component with a compensation plan.			
CompensationPlanID	The unique identifier of the Compenstaion Plan generated internally.	Must be the identifier for an existing compensation plan.	Required	Required
PlanComponentId	The unique identifier of a plan component.	Must be the identifier for an existing plan component.	Required	Not Required
StartDate	The date and time when the plan component associated with compensation plan becomes active.	Must be a valid date.	Required	Not Required
EndDate	The date and time when the plan component associated with compensation plan becomes inactive.	Must be a valid date.	Not Required	Not Required
CalculationSequence	Indicates the order in which the calculation engine considers the plan component within a compensation plan.	Must be a valid number. The default value is 1.	Not Required	Not Required
TargetIncentivePercent	The percentage of influence a plan component has on the compensation plan.	Must be a number. The default value is 100.	Not Required	Not Required

You can view the Compensation Plan Component object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Compensation Plan Component** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compensation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Compensation Plans Flex Data

You can use Import Management to create and update Compensation Plans Flex records.

You can use Import Management to create and update Compensation Plan Flexfield records.

To import Compensation Plan Flexifield records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Compensation Plan Flexifield data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Asset Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for creating and updating Compensation Plan Flexfield records, prerequisite setup tasks for the attributes, and specific validations, if any, for Compensation Plan Flexfield Record import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Compensation Plan Flexifield record	Updating an Existing Compensation Plan Flexifield record
CompPlanId	The unique identifier of the the compensation plan generated internally.	Must be the identifier for an existing compensation plan.	Required	Required
CompensationPlanID	The unique identifier of the Compensation Plan Flexifield generated internally.	None	Not Required	Required
__FLEX_Context	The flex context segment code for the compensation plan. It determines which context-sensitive segments are displayed.	None	Not Required	Not Required
__FLEX_Context_ DisplayValue	The flex context segment display name for the compensation plan. It determines which context-sensitive segments are displayed.	None	Not Required	Not Required
Attribute1	Attribute 1 of the descriptive flexfield	None	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Compensation Plan Flexifield record	Updating an Existing Compensation Plan Flexifield record
AttributeNumber1	Numeric Attribute 1 of the descriptive flexfield.	None	Not Required	Not Required
AttributeDate1	Date Attribute 1 of the descriptive flexfield	None	Not Required	Not Required

You can view the Compensation Plan Flexfield object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Compensation Plan Flexfield** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Asset Resource information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Asset Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

How do I import competitor data?

You can use Import Management to create or update Competitor records.

To import Competitor records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Competitor data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Competitor object, the attributes are Party Id and Registry Id.

Required Attributes and Validations for the Competitor Object

To import data successfully into Oracle Applications 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 Competitor records, prerequisite setup tasks for the attributes, and specific validations, if any, for Competitor import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Competitor Record	Updating an Existing Competitor Record
Organization Name	Competitor Name - The name that identifies the competitor object	Not Applicable	Required	Conditionally Required
Name	Competitor Name - The name that identifies the competitor object	Not Applicable	Conditionally Required	Conditionally Required
Party Type	Competitor Party Type - Type of party record	Not Applicable	Conditionally Required The default value is ORGANIZATION.	Do not provide a value.
Party ID	PartyId -The unique ID for the existing competitor record.	A list of all party IDs is obtained by exporting the Competitor object.	Do not provide a value.	Required
Registry ID	Registry ID (PartyNumber) - The public unique identifier of the Competitor.	Not Applicable	Do not provide a value.	Conditionally Required

You can view the Competitor object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Competitor** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Competitor from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Contact Data

How do I import contact data?

You can use the Import Management to create, update, or delete contact records.

You can import contact records using these steps:

1. Map your source contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your contact data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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

To better manage your contact information, the contact object has the following child objects:

- Address
- Classification
- Relationship
- Sales Team Member

> **Note:** You can't set an attribute value to NULL in optimized import (standard import with the option **Enable High-Volume Import** selected). However, when updating a record, you can change an attribute value from NOT NULL to NULL

If you want to import only a few records, then you can create a single CSV file for all contact attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the contact child objects. Note that you must have imported the CSV file for contact object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contacts or are updating contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for the Contact Object

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

This table lists the required attributes for contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task or Import Validations	Creating a Contact Record	Updating an Existing Contact Record	Deleting an Existing Contact Record
`SourceSystem`	The code representing the source system for the contact.	Identify the source system or configure source systems either by using the Manage Trading Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System Reference import object.	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: • SourceSystem and SourceSystemRefe • PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: • SourceSystem and SourceSystemRefe • PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: • SourceSystem and SourceSystemReferenceValu • PartyNumber
`SourceSystemRefere`	The reference number or text representing the source system unique ID for the contact.	Identify the source system or configure source systems either by using the Manage Trading Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System Reference import object.	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: • SourceSystem and SourceSystemRefe • PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: • SourceSystem and SourceSystemRefe • PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: • SourceSystem and SourceSystemReferenceValu • PartyNumber
PartyNumber	The public unique identifier of the contact.	No prerequisite tasks	Conditionally Required	Conditionally Required	Conditionally Required
FirstName	First name of a person party.	No prerequisite tasks	Required	Not required	Not required
LastName	Last name of a person party.	No prerequisite tasks	Required	Not required	Not required

Note: For the **Time Zone** import attribute, specify the time zone of the contact to know the preferred time to call or send e-mail to the contact.

You can use the profile option ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE to control how address types are entered. By default this profile option is set to Yes, so you can enter multiple address types, during high-volume import of Account, Contact, and Household objects . You can disable this profile option to improve the import performance. When you set this profile option to No, you can enter only a single address type.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the contact object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Providing the ZIP and Country Code values in the import CSV file won't automatically populate the State/County/City fields. Values for these fields should be separately provided in the import file.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the contact information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

> **Note:** After importing your data successfully, you need to run a couple of post processing jobs for duplicate identification, duplicate resolution, and account assignment. For more information on import management post processing jobs, see the topic: Import Management Post Processing for Accounts and Contacts.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Example of Adding or Updating Primary Account

You can add or update the primary account of a contact using import management. Before adding or updating the primary account, ensure that the account exists.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can add or update a primary account by submitting any one or more of the unique identifiers.

List of Contact Identifiers:

- PartyId
- PartyNumber
- SourceSystem and SourceSystemReferenceValue

List of Account Identifiers:

- PrimaryAccountPartyId
- PrimaryAccountPartyNumber
- PrimaryAccountSourceSystem and PrimaryAccountSourceSystemReferenceValue

To add or update the primary account of a contact, you must create a source file (CSV) and import it using import management. Below table lists the attributes using Party ID and Account Party ID as identifier:

Attribute Name	Value
PartyId	300100545540596
PrimaryAccountPartyId	300100545540269

Create the Import Activity

After you have the CSV file ready, create an import activity to import the account information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How You Enable Automatic Account Assignment

Example of Changing or Assigning Owner of a Contact

You can change or assign the owner of a contact using import management. Before changing or assigning the owner, ensure that the contact exists and the owner is an active or valid resource.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can change or assign a primary account by submitting any one or more of the unique identifiers.

List of Contact Identifiers:

- PartyId
- PartyNumber
- SourceSystem and SourceSystemReferenceValue

List of Owner Identifiers:

- OwnerPartyId
- OwnerPartyNumber
- OwnerSourceSystem and OwnerSourceSystemReferenceValue

To change owner of a contact, you must create a source file (CSV) and import it using import management. Below table lists the attributes using Party ID and Owner Party ID as identifier:

Attribute Name	Value
PartyId	300100545540596
OwnerPartyId	300100545540269

Create the Import Activity

After you have the CSV file ready, create an import activity to import the account information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How You Enable Automatic Account Assignment

Import Your Contact Member Data

You can use the Import Management to create, update, or delete contact member records.

You can import contact member records using these steps:

1. Map your source contact member data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the contact member data you want to import.

3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your contact member data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contact members or are updating contact members that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contact Member Object

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

This table lists the required attributes for contact member records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Member record	Updating an Existing Contact Member record
MemberId	The unique ID for the existing member record in the Oracle Fusion destination table.	The unique Id for the existing account Id record in the Oracle Fusion destination table.	Not required	Conditionally required A value is required if you're updating an existing Member ID and you're not providing the Service Request ID and Party ID.
PartyId	The unique ID for the existing party record in the Oracle Fusion destination table.	Do not provide a value if creating a new party in the same import batch as this additional party name. If you provide the value for an existing party, the value must exist in the HZ_PARTIES table, column PARTY_ID. You can obtain the PARTY_ID for an existing party by exporting the Party object. To export, navigate to **Tools** > **Export Management** > **Create Export Activity**.	Not required	Not required
Relationship Type Code	Indicates relationship with the contact, such as ALTERNATE, FOLLOWER, or THIRD_PARTY.	If providing a value, the value must exist in the FND_LOOKUPS table with LOOKUP_TYPE='ORA_SVC_CONTACT_REL_TYPE_CD'.	Required	Required
Service Request ID	Indicates the service request Id to which the contact member belongs.	No validation	Not required	Conditionally required A value is required if you're updating an existing contact and you're not providing the SRNumber.
SRNumber	The unique number used to identify a service request. You can configure the service request number to a format that's best suitable to your organizational requirements.	No validation	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID..	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the contact member object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contact Member** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the contact member information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contact Member from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

How do I import contact point data?

You can use Import Management to create, update, or delete Contact Point records. You can use contact point to import customer contact information such emails, phone numbers, instant messenger address, web URL, and so on.

To import Contact Point records, perform the following tasks:

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

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

How You Map Your Source Data to Target Object Attributes

To import your Contact Point data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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.
- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contacts or are updating contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contact Point Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Contact Point records, required attributes for updating Contact Point records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contact Point import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Point Record	Updating an Existing Contact Point Record
ContactPointType	Type of the contact point that's imported or updated	This has to be a lookup_ code in HZ_LOOKUPS with a lookup_type as COMMUNICATION_TYPE	Provide one of these values: • EMAIL, if the email address is to be imported. • INSTANT_ MESSAGING, if the instant messenger address is to be imported. • WEB, if the URL is to be imported. • PHONE, if the phone number is to be imported.	Not required
PartyId	The internal ID for the party to which the contact point belongs	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartyNumber	Specifies the PUID of the party	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartySourceSystem	Specifies the original source system of the party	This has to be in HZ_ORIG_ SYSTEMS_B with the status "A".	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartySourceSystemReferenc	Specifies the party's source system reference in the original source system	No validation	Provide one of the following :	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Point Record	Updating an Existing Contact Point Record
			• PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	
SourceSystem	Specifies the original source system name	This has to be in HZ_ORIG_ SYSTEMS_B with the status "A".	Provide a valid value.	Not required
SourceSystemReferenceValu	Specifies the identifier in the original source system	No validation	Provide a valid value.	Not required
ContactPointId	System generated unique identifier. This is the primary key.	No validation	Not required	If you can export the existing contact point, provide this primary key to identify the record for further updates.
Status	The status of the contact point.	Not required This defaults to Y during creation.	Not required	To inactivate an existing active contact point record, you need to set the Import Mode to "Delete Records" and pass Contact Point Id. Contact point Source system, or Contact point Source system reference.
DoContactPreferenceFlag	Add or update a contact's preference to receive e-mail or phone calls on the contact, account or household contact points. This attribute identifies if a contact has made a choice to be contacted.	Don't set both this attribute and DoNotContactPreferenceFla to Y simultaneously. Set either this attribute or DoNotContactPreferenceFla to "Y". These are non-mandatory values. However, you can set both this attribute and DoNotContactPreferenceFla to "N".	Not required	Not required
DoNotContactPreferenceFla	Add or update a contact's preference not to receive e-mail or phone calls on the contact, account or household contact points. This attribute identifies if a contact has made no choice to be contacted.	Don't set both this attribute and DoContactPreferenceFlag to Y simultaneously. Set either this attribute or DoContactPreferenceFlag to "Y". These are non-mandatory values. However, you can set both this attribute and	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Point Record	Updating an Existing Contact Point Record
		DoContactPreferenceFlag to "N".		
DoNotContactReason	Add or update the reason for a contact not to receive e-mail or phone calls on the contact, account or household contact points.	This is used for DoNotContactPreferenceFla[illegible] It is a non-mandatory field.	Not required	Not required

You can view the Contact Point 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contact Point** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contact Point from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Contest Data

You can use Import Management to create update, or delete Contest records.

To import Contest records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Contest data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contests or are updating contests that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contest Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Contest records, required attributes for updating Contest records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contest import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contest Record	Updating an Existing Contest Record
ContestId	The unique identifier of the contest	No validation	Not required This is auto generated.	Conditionally required Either the ContestId or the ContestNumber is required.
ContestName	The name of the contest	No validation	Required	Not required
OwnerId	The unique identifier of a valid employee resource who owns and manages the contest	The resource should exist.	Not required This is auto defaulted to creator.	Not required
StartDate	The start date of the contest	Current date and time or a future date	Required	Not required
EndDate	The end date of the contest	This must be later than the start date.	Required	Not required
KPIId	The unique identifier of the KPI selected for the contest	The KPI record should exist.	Either the KPIId or the KPINumber is required	Not required
OwnerNumber	The unique alternate identifier of the resource who owns and manages the contest	The resource should exist.	Not required This is auto defaulted to creator.	Not required
KPINumber	The unique alternate identifier of the KPI selected for the contest	The KPI record should exist.	Either the KPIId or the KPINumber is required.	Not required
ContestNumber	The unique alternate identifier for the contest	No validation	Not required This is auto generated.	Conditionally required Either the ContestId or the ContestNumber is required.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contest Record	Updating an Existing Contest Record

You can view the Contest 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contest** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contest from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Contest Resources Data

You can use Import Management to create update, or delete Contest Resources records.

To import Contest Resources records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Contest Resources data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contest resources or are updating contest resources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contest Resources Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Contest Resources records, required attributes for updating Contest Resources records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contest Resources import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contest Resources Record	Updating an Existing Contest Resources Record
Contest ResourceId	The unique identifier of the contest resource	No validation	Not required This is auto generated.	Conditionally required A value is required if the composite key isn't used.
ResourceId	The unique identifier of the resource associated with the contest	The resource should exist.	Required Either the ResourceId or the ResourceNumber is required.	Not required This can be used as a composite key with ContestId when the primary key isn't used.
ResourceNumber	The unique alternate identifier of the resource associated with the contest	The resource should exist.	Required Either the ResourceId or the ResourceNumber is required.	Not required This can be used as a composite key with ContestNumber when the primary key isn't used.
ContestId	The unique identifier of the contest	The contest should exist.	Required Either the ContestId or the ContestNumber is required.	Not required This can be used as a composite key with ResourceId when the primary key isn't used.
ContestNumber	The unique alternate identifier for the contest	The contest should exist.	Required Either the ContestId or the ContestNumber is required.	Not required This can be used as a composite key with ResourceNumber when the primary key isn't used.

You can view the Contest Resources 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.

2. Select the **Contest Resources** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contest Resources from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Contract Data

How do I import contract data?

You can use Import Management to create or update Contract data.

To import Contract records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (CSV) file for import.

3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Object Attributes

To import your Contract data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application.

Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

> **Note:** You can't update or customize a PUID. You can provide a unique value. If left blank, the system will generate a unique identifier.

Required Attributes and Validations for the Contract Object

To import data successfully into Oracle Applications 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 Contract records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Record	Updating an Existing Contract Record
ContractNumber	The alternate unique identifier of the Contract.	No validation	Required	Not required
ContractPuid	The unique PUID that identifies the Contract.	This number identifier must be unique across Contracts of all types.	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Record	Updating an Existing Contract Record
ContractTypeId	The unique ID of the Contract type. The Contract type sets various properties for the Contract such as the type of permitted Contract lines, party roles, Contract validation checks, and the Contract acceptance and signature requirements.	You can determine and manage Contract types. Navigate to the following in Setup and Maintenance: • Offering: Sales • Functional Area: Sales • Task: Manage Contract Types	Required if ContractTypeName isn't entered.	Not required
ContractTypeName	The name of the Contract type. The Contract type sets various properties for the Contract such as the type of permitted Contract lines, party roles, Contract validation checks, and the Contract acceptance and signature requirements.	You can determine and manage Contract types. Navigate to the following in Setup and Maintenance: • Offering: Sales • Functional Area: Sales • Task: Manage Contract Types	Required if ContractTypeId isn't entered.	Not required
Currency	The name of the currency in which Contract amounts are entered.	This must be a valid currency.	Required if CurrencyCode isn't entered	Not required
CurrencyCode	The code of the currency in which Contract amounts are entered.	This must be a valid currency.	Required if Currency isn't entered	Not required
InvOrganizationId	The unique Id representing the item master organization	This must be a valid ORGANIZATION_ID from the HR_ALL_ ORGANIZATION_UNITS_F table.	Required if the InvOrgName isn't entered	Not required
InvOrgName	The name representing the item master organization.	This must be a valid ORGANIZATION_ID from the HR_ALL_ ORGANIZATION_UNITS_F table.	Required if the InvOrganizationId isn't entered	Not required
LegalEntityId	The unique Id of the legal entity to which the Contract belongs.	This must be a valid record as per GL_LEDGER_LE_V.	Required if the LegalEntityName isn't entered.	Not required
LegalEntityName	The name of the legal entity to which the Contract belongs.	This must be a valid record as per GL_LEDGER_LE_V.	Required if the LegalEntityId isn't entered.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Record	Updating an Existing Contract Record
OrgId	The unique Id of the business unit to which the Contract belongs.	This must be a valid business unit Id.	Required if the OrgName isn't entered	Not required
OrgName	The name of the business unit to which the Contract belongs.	This must be a valid business unit name.	Required if the OrgId isn't entered	Not required
StartDate	The date on which the Contract comes into effect.	No validation	Required	Not required
StsCode	The code of the Contract status. Examples are ACTIVE, DRAFT, CLOSED, and CANCELED.	Navigate to the following in Setup and Maintenance: • Offering: Sales • Functional Area: Sales • Task: Manage Standard Lookups Search for the Contract Statuses lookup. Activating a draft contract, and one-time import of closed, canceled, and active contracts is supported. You can't update the contract status from active to any other status. Also, you can't update a contract once it is active. You can't import contracts in EXPIRED status directly in the system. You must import the contracts with ACTIVE status and then update contract status to EXPIRED.	Required	Not required

Note: Keep a note of the following:

- The attribute **GeneratedInvoiceStatus** must have one of the following values:
  - D for Draft
  - S for Submitted for approval
  - R for Released
  - Ensure to provide one of the values D, S, or R while importing Project contracts.
- SupplierId is the party identifier of the supplier and SupplierSiteId is the party site identifier of the vendor.
- When you import contracts using the contract type column with the contract numbering method set as Automatic, you can leave the ContractNumber column blank in the CSV file for the application to generate the contract numbers automatically. You can also enter the contract number manually when you don't want the application to assign the contract numbering automatically.
- When the contract type has the contract numbering method set as Manual, you can't leave the contract number blank. If the contract number is left blank, then the application generates an error.
- To activate a contract while importing, provide the value 'ACTIVE' for the StsCode attribute. This will also activate the lines added to the contract.
- To import contracts that are closed, canceled, or on hold, you must first import the contract with all required import files, and then re-import the contract import file with the following information:
  - Closed contracts: You must include Status (the status will be Closed), Close reason code, CloseReasonSetCode, Termination Date.
  - On-Hold Contracts: You must include Status (the status will be Hold), Hold Reason Code, Hold reason Set Code, Hold Until Date.
  - Canceled contracts: You must include Status (the status will be Canceled), Cancel Reason, Cancel reason set code, Cancel date.
  - To avoid the modification of the contribution percentage you must include the contribution percentage in the same import file that you're using to activate the contract.
- To import data in other languages, use the column attributes "Language and Source Language" in Contract header file and set the preferred language. Then import the parties with the desired values.

You can view the Contract object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Example of Importing Contract Data

A contract is an agreement between two or more than two parties to fulfill an agreed scope of work. This example demonstrates how to import contract data using Import Management.

In this example, you have a source file containing contract data that you want to import into the application.

Summary of the Tasks

You perform the following steps to create an import activity and activate the import:

1. Determine what information is in the source file.
2. Create and schedule the import activity.

Determine the Information in the Source File

You include the data that you want to import into Sales and Fusion Service in a source CSV file. A sample input CSV file for importing contracts with the required attributes:

Sample CSV file to Import Contracts

ContractNumb	ContractPuid	ContractTypeN	Currency	InvOrgName	LegalEntityNa	OrgId	StartDate	StsCode
GP-12345	GP-12345	1 Service Contract	US Dollar	Vision Operations	Vision Operations	204	1/1/2020	DRAFT
SP-5695	SP-5695	AOKC_ SellLines	US Dollar	Vision Project Mfg	Vision Project Mfg	600	22/5/2022	DRAFT
AB-88601	AB-88601	AOKC_ BuyLines	US Dollar	Vision Services	Vision Services	458	5/8/2022	DRAFT

Note the following:

- When you import contracts using the contract type column with the contract numbering method set as Automatic, you can leave the ContractNumber column blank in the CSV file for the application to generate the contract numbers automatically. You can also enter the contract number manually when you don't want the application to assign the contract numbering automatically.
- When the contract type has the contract numbering method set as Manual, you can't leave the contract number blank. If the contract number is left blank, then the application generates an error.
- To activate a contract while importing, provide the value 'ACTIVE' for the StsCode attribute. This will also activate the lines added to the contract.
- To import contracts that are closed, canceled, or on hold, you must first import the contract with all required import files, and then re-import the contract import file with the following information:
  - Closed contracts: You must include Status (the status will be Closed), Close reason code, CloseReasonSetCode, Termination Date.
  - On-Hold Contracts: You must include Status (the status will be Hold), Hold Reason Code, Hold reason Set Code, Hold Until Date.
  - Canceled contracts: You must include Status (the status will be Canceled), Cancel Reason, Cancel reason set code, Cancel date.

You can create an import activity, enter the import details, and schedule the import.

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Contract from the Object drop-down list.

Note: In the Advanced Options section, the option Enable High-Volume Import is selected by default. This mode is designed to import millions of records at once.

1. Select the CSV file in the File Name field, and click Next.
2. The source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
3. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
4. Review the import details on the Review and Submit page, and click Submit.

Import Your Contract Bill Line Data

You can use Import Management to create or update Contract Bill Line records.

To import Contract Bill Line records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Bill Line data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 Contract Bill Line object, the attributes are LinePUID and SequenceNumber.

Required Attributes and Validations for the Contract Bill Line Object

To import data successfully into Oracle Applications 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

Contract Bill Line records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Bill Line import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Bill Line Record	Updating an Existing Contract Bill Line Record
LinePuid	The unique PUID that identifies the contract line	This must be a valid PUID.	A value is required if the covered asset external source and external key aren't specified.	Not required
SequenceNumber	The sequence number of the contract bill line	No validation	Required	Not required
ChargeDefinitionCode	The charge definition code	This must be a valid charge definition code defined in the contract pricing.	A value is required if the charge definition isn't passed.	Not required
ChargePeriod	The charge period	No validation	Required	Not required
ChargeDefinition	The charge definition	This must be a valid charge definition defined in the contract pricing.	A value is required if the charge definition code isn't passed.	Not required
ExtSource	The external source of the bill line	This must be a unique external source across all bill lines.	Required	Required
ExtKey	The external key of the bill line	This must be a unique external key across all bill lines.	Required	Required
CoveredAssetExtSource	The external source of the covered asset	This must be a valid covered asset external source.	A value is required if the line PUID isn't passed.	Not required
CoveredAssetExtKey	The external key of the covered asset	This must be a valid covered asset external key.	A value is required if the line PUID isn't passed.	Not required
DateToInterface	The date to interface	No validation	Required	Not required
DateBilledFrom	The date from which the contract bill line becomes effective.	No validation	Required	Not required
DateBilledTo	The date till which the contract bill line is effective	No validation	Required	Not required
RecurringFlag	The option indicating if this line is recurring	The valid values are Yes or No.	Required	Not required

You can view the Contract Bill Line object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Bill Line** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Bill Line from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Billing Milestone Data

You can use Import Management to create update, or delete Project Contract Billing Milestone records.

To import Milestone records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Project Contract Billing Milestone data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

- Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Project Contract Billing Milestone Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Project Contract Billing Milestone records, required attributes for updating or deleting Milestone records, prerequisite setup tasks for the attributes, and specific validations, if any, for Milestone import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Project Contract Billing Milestone Record	Updating an Existing Project Contract Billing Milestone Record	Deleting an Existing Project Contract Billing Milestone Record
LinePuid	The unique PUID that identifies the contract line.	This must be a valid PUID.	Required	Not Required	Not Required
ExternalSourceKey	The external source of the milestone information.	The external source and key combination must be unique.	Required A combination of external source and external key is required.	Required	Required
ExternalReferenceKey	The external key of the milestone information.	The external source and key combination must be unique.	Required A combination of external source and external key is required.	Required	Required
MilestoneName	The name of the milestone.	No validation	A value is required if you're creating a new milestone on a contract line, as opposed to adding an existing project plan milestone to the contract line.	Not Required	Not Required
ProjectId	The unique identifier of the project that owns the milestone.	The project must have an active association to the contract line.	Required if ProjectNumber isn't entered.	Not Required	Not Required
ProjectNumber	The number of the project that owns the milestone.	The project must have an active association to the contract line.	Required if ProjectId isn't entered.	Not Required	Not Required
ParentTaskId	The unique identifier of the project plan parent task under which the milestone is created.	The parent task of a milestone must be on or below the level at which the project is associated with the contract line. Don't populate this attribute if you want to create a milestone with the project as the parent.	Either ParentTaskId or ParentTaskNumber is required if the project is associated to the contract line at a task level.	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Project Contract Billing Milestone Record	Updating an Existing Project Contract Billing Milestone Record	Deleting an Existing Project Contract Billing Milestone Record
ParentTaskNumber	The unique number of the project plan parent task under which the milestone is created.	The parent task of a milestone must be on or below the level at which the project is associated with the contract line. Don't populate this attribute if you want to create a milestone with the project as the parent.	Either ParentTaskId or ParentTaskNumber is required if the project is associated to the contract line at a task level.	Not Required	Not Required
PlannedFinishDate	The expected finish date of the milestone.	The planned finish date must be within the effective dates of the milestone's parent in the project plan if the Automatically Roll Up Task Planned Dates setting is not enabled. The planned finish date must also be within the effectivity dates of the contract line. If the milestone is for an Award, then the planned finish date must be on or after the earlier of the preaward date or the contract line start date and on or before the later of the close date or contract line end date.	A value is required if you're creating a new milestone on a contract line, as opposed to adding an existing project plan milestone to the contract line.	Not Required	Not Required
MilestoneAmount	The bill transaction amount for the milestone.	No validation	Required	Not Required	Not Required
TransactionCurrency	The currency code of the bill transaction amount for the milestone.	The bill transaction currency must be the same as the contract currency for milestones.	Required	Not required	Not Required
EventTypeId	The unique identifier of the event type of the billing event created for the milestone.	The event type must be active as of the current date. Event types with the Allow Item option enabled can't be used for milestones.	Required if EventTypeName isn't entered.	Not Required	Not Required
EventTypeName	The name of the event type of the billing event created for the milestone.	The event type must be active as of the current date. Event types with the Allow Item option enabled can't be used for milestones.	Required if EventTypeId isn't entered.	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Project Contract Billing Milestone Record	Updating an Existing Project Contract Billing Milestone Record	Deleting an Existing Project Contract Billing Milestone Record
ProjectPlanMilestoneId	The unique identifier of the milestone in the project plan.	The project plan milestone must be billable, lowest-level in the project plan, have no duration, isn't in a Complete status, and isn't already associated to a contract line.	To add an existing project plan milestone to a contract line, either ProjectPlanMilestoneId or ProjectPlanMilestoneNu is required.	Not Required	Not Required
ProjectPlanMilestoneNu	The unique number of the milestone in the project plan.	The project plan milestone must be billable, lowest-level in the project plan, have no duration, isn't in a Complete status, and isn't already associated to a contract line.	To add an existing project plan milestone to a contract line, either ProjectPlanMilestoneId or ProjectPlanMilestoneNu is required.	Not required	Not Required

You can view the Project Contract Billing Milestone object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Project Contract Billing Milestone** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Project Contract Billing Milestone** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Contract Charge Data

You can use Import Management to create or update Contract Charge records.

To import Contract Charge records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Charge data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 Contract Charge object, the attribute is LinePUID.

Required Attributes and Validations for the Contract Charge Object

To import data successfully into Oracle Applications 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 Contract Charge records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Charge import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Charge Record	Updating an Existing Contract Charge Record
LinePUID	The PUID of the contract line	This must be a valid line PUID.	A value is required if the charge is associated with a contract line.	Required
CoveredAssetExtSource	The external source of the covered asset	This must be a valid covered asset external source.	A value is required if the charge is associated with a covered asset.	Required
CoveredAssetExtKey	The external key of the covered asset	This must be a valid covered asset external key.	A value is required if the charge is associated with a covered asset.	Required
ChargeDefinitionCode	The charge definition code	This must be a valid charge definition code defined in contract pricing.	A value is required if the charge definition name isn't passed.	Not required
ChargeDefinition	The charge definition name	This must be a valid charge definition name defined in contract pricing.	A value is required if the charge definition code isn't passed.	Not required
PricePeriodicityCode	The price periodicity code	This must be a valid price periodicity code.	A value is required if the price periodicity name isn't passed.	Not required
PricePeriodicity	The price periodicity name	This must be a valid price periodicity name.	A value is required if the price periodicity code isn't passed.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Charge Record	Updating an Existing Contract Charge Record
ExtSource	The external source of the charge	This must be a unique value across the Charge table.	Required	Not required
ExtKey	The external key of the charge	This must be a unique value across the Charge table.	Required	Not required

You can view the Contract Charge object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Charge** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Charge from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Charge Component Data

You can use Import Management to create or update Contract Charge Component records.

To import Contract Charge Component records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Charge Component data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Required Attributes and Validations for the Contract Charge Component Object

To import data successfully into Oracle Applications 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 Contract Charge Component records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Charge Component import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Charge Component Record	Updating an Existing Contract Charge Component Record
ExtSource	The external source of the charge component	This must be a unique value across the Charge Components table.	Required	Required
ExtKey	The external key of the charge component	This must be a unique value across the Charge Components table.	Required	Required
ContractChargeExtSource	The external source of the charge	This must be a valid charge external source.	Required	Not required
ContractChargeExtKey	The external key of the charge	This must be a valid charge external key.	Required	Not required
HeaderCurrencyUnitPrice	The unit price of the charge	No validation	Required	Not required

You can view the Contract Charge Component object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Charge Component** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Charge Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Covered Assets Data

You can use Import Management to create or update Contract Covered Assets records.

To import Contract Covered Assets records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Covered Assets data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Covered Assets object, this attribute is AssetId.
- 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 Contract Covered Assets object, the attributes are LinePUID and LineNumber.

Required Attributes and Validations for the Contract Covered Assets Object

To import data successfully into Oracle Applications 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 Contract Covered Assets records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Covered Assets import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Covered Assets Record	Updating an Existing Contract Covered Assets Record
LinePuid	The PUID of the contract line	This must be a valid line PUID.	Required	Not required
EndDate	The end date of the covered asset	No validation	Not required	Not required
ExtKey	The external key of the covered asset	This must be a unique external key across all covered assets.	Required	Required
ExtSource	The external source of the covered asset	This must be a unique external source across all covered assets.	Required	Required
LineNumber	The line number of the covered asset	No validation	Required	Not required
PriceUom	The price unit of measure	This must be a valid price UOM.	A value is required if the `priceuomcode` isn't passed.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Covered Assets Record	Updating an Existing Contract Covered Assets Record
PriceUomCode	The price unit of measure code	This must be a valid price UOM code.	A value is required if the `priceuom` isn't passed.	Not required
Quantity	The contract covered assets quantity	No validation	Required	Not required
StartDate	The date on which the contract covered asset begins	No validation	Required	Not required
Status	The status of the contract covered asset	This must be a valid status.	A value is required if the status code isn't passed.	Not required
StatusCode	The status code of the contract covered asset	This must be a valid status code.	A value is required if the status isn't passed.	Not required
AssetId	The unique identifier of the asset	This must be a valid asset ID.	A value is required if the asset name isn't passed.	Not required
AssetName	The name of the asset	This must be a valid asset name.	A value is required if the asset ID isn't passed.	Not required

You can view the Contract Covered Assets object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Covered Assets** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Covered Assets from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

How do I import contract header descriptive flexfield data?

You can use Import Management to create or update Contract Header Descriptive Flexfield records.

To import Contract Header Descriptive Flexfield records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Header Descriptive Flexfield data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Header Descriptive Flexfield object, the attribute is Contract Id.
- **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 Contract Header Descriptive Flexfield object, the attribute is Contract PUID.

Required Attributes and Validations for the Contract Header Descriptive Flexfield Object

To import data successfully into Oracle Applications 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 Contract Header Descriptive Flexfield records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Header Descriptive Flexfield import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Header Descriptive Flexfield Record	Updating an Existing Contract Header Descriptive Flexfield Record
ContractId	The Id of the contract.	This must be a valid contract Id.	Not required	Not required
ContractPuid	The unique PUID that identifies the contract.	This must be a valid contract PUID.	Required	Required
AttributeCategory	Attribute category of the descriptive flexfield	No validation	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Header Descriptive Flexfield Record	Updating an Existing Contract Header Descriptive Flexfield Record
Attribute1	Attribute 1 of the descriptive flexfield	No validation	Required	Not required
Attribute2	Attribute 2 of the descriptive flexfield	No validation	Not required	Not required
Attribute3	Attribute 3 of the descriptive flexfield	No validation	Not required	Not required
Attribute4	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required
Attribute5	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required

You can view the Contract Header Descriptive Flexfield object 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.

Note: For importing Context Sensitive DFFs you need to run a query in the "okc_k_headers_all_b" table that contains the DFF you want to import. It lets you find out and populate your "AttributeCategory" field that is required to perform the operation. It's recommended to perform the query on an already existing contract that contains the DFF you want to import, so you can easily find the "AttributeCategory" field.To provide the Attribute category: 1. Create/Update a contract with the Context of DFF you're expecting 2. Get the query output of "Select ATTRIBUTE_CATEGORY from okc_k_headers_all_b where contract_number = '<<Contract Number>>'" 3. Update the value fetched from the above query in the import data file

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Header Descriptive Flexfield** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Header Descriptive Flexfield from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Header Translation Data

You can use the import functionality to create, update, or delete your contract header translation data.

You can import contract header translation records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the contract header translation data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import contract header translation data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the contract header translation import object.

- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

If you want to import only a few records, then you can create a single CSV file for all contract header translation attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the contract header translation child objects. Note that you must have imported the CSV file for contract header translation object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contract header translation or are updating contract header translation that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contract Header Translation Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for contract header translation records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Header Translation record	Updating an Existing Contract Header Translation record
ContractPuid	The PUID of the contract for which the translation information is captured.	Must be a valid contract PUID.	Required	Required
Lang	The language of the translation.	Must be a valid language. You can find valid values in OKC_CONTRACT_TYPES_TL table.	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the contract header translation object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Contract Header Translation object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the contract header translation information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Contract Header Translation** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.

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

6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- Tables and Views for Sales and Fusion Service

How do I import contract line data?

You can use Import Management to create or update Contract Line records.

To import Contract Line records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Line data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications

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 Contract Line object, the attributes are Line Id and Id.

- **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 Contract Line object, the attribute is Line PUID.

Required Attributes and Validations for the Contract Line Object

To import data successfully into Oracle Applications 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 Contract Line records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Line import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Record	Updating an Existing Contract Line Record
ContractPuid	The unique PUID that identifies the contract	No validation	Required	Not required
ItemName	The item name for an item type of line	This must be a valid inventory item.	Required for an item type of line	Not required
ItemNameTxt	The item name for a free form type of line	No validation	Required for a free form type of line	Not required
ItemQuantity	The line quantity.	No validation	Required for an item type of line	Not required
LineAmount	The line amount.	No validation	Required for a free form type of line	Not required
LineNumber	The number of the contract line.	This must be a unique number within a contract.	Required	Not required
LinePuid	The unique PUID that identifies the contract line.	This must be a unique PUID across all contract line records.	Required	Required
LineStatus	The line status	This must be one of Active, Draft, Closed, or Canceled.	Required if StsCode isn't entered	Not required
LineTypeId	The Id that represents the line type.	This must be valid as per OKC_CONTRACT_TYPE_ LINES.	Required if LineTypeName isn't entered	Not required
LineTypeName	The name of the line type.	This must be valid as per OKC_CONTRACT_TYPE_ LINES.	Required if LineTypeId isn't entered	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Record	Updating an Existing Contract Line Record
StartDate	The date from which the contract line becomes effective.	No validation	Required	Not required
StsCode	The code that represents the line status	This must be one of ACTIVE, DRAFT, CLOSED, or CANCELED	Required if LineStatus isn't entered	Not required
UnitOfMeasure	The unit of measure of the contract line.	This must be a valid unit of measure in INV_UNITS_OF_MEASURE_TL.UNIT_OF_MEASURE.	Required if the UOMCode isn't entered	Not required
UnitPrice	The unit price of the line.	No validation	Required for an item type of line	Not required
UOMCode	The UOM code of the contract line.	This must be a valid unit of measure in INV_UNITS_OF_MEASURE_B.UOM_CODE.	Required if the UnitOfMeasure isn't entered	Not required

You can view the Contract Line object 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.

Note: The attribute PriceAsOf can't be updated.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Line** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Line from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Line Descriptive Flexfield Data

You can use Import Management to create or update Contract Line Descriptive Flexfield records.

To import Contract Line Descriptive Flexfield records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Line Descriptive Flexfield data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Line Descriptive Flexfield object, the attribute is Line Id.
- **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 Contract Line Descriptive Flexfield object, the attribute is Line PUID.

Required Attributes and Validations for the Contract Line Descriptive Flexfield Object

To import data successfully into Oracle Applications 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 Contract Line Descriptive Flexfield records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Line Descriptive Flexfield import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Descriptive Flexfield Record	Updating an Existing Contract Line Descriptive Flexfield Record
LineId	The Id of the contract line.	This must be a valid contract line Id.	Not required	Not required
LinePuid	The unique PUID that identifies the contract line.	This must be a valid contract line PUID.	Required	Required
AttributeCategory	Attribute category of the descriptive flexfield	No validation	Not required	Not required
Attribute1	Attribute 1 of the descriptive flexfield	No validation	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Descriptive Flexfield Record	Updating an Existing Contract Line Descriptive Flexfield Record
Attribute2	Attribute 2 of the descriptive flexfield	No validation	Not required	Not required
Attribute3	Attribute 3 of the descriptive flexfield	No validation	Not required	Not required
Attribute4	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required
Attribute5	Attribute 5 of the descriptive flexfield	No validation	Not required	Not required

You can view the Contract Line Descriptive Flexfield object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Line Descriptive Flexfield** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Line Descriptive Flexfield from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Line Internal Attribute Data

You can use Import Management to create or update contract line internal attribute records.

To import contract line internal attribute records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your contract line internal attribute data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 contract line internal attribute object, the attribute is LinePUID.

Required Attributes and Validations for the Contract Line Internal Attribute Object

To import data successfully into Oracle Applications 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 contract line internal attribute records, prerequisite setup tasks for the attributes, and specific validations, if any, for contract line internal attribute import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Internal Attribute Record	Updating an Existing Contract Line Internal Attribute Record
LinePuid	The PUID of the contract line for which the internal attributes are captured.	This must be a valid contract line PUID.	Required	Not required
ExtSource	The external source of the contract line internal attribute information.	This must be a unique combination of external source and key.	Required A combination of external source and external key is required.	Required
ExtKey	The external key of the contract line internal attribute information.	This must be a unique combination of external source and key.	Required A combination of external source and external key is required.	Required
ProviderBusinessUnitId	The provider business unit ID. This is applicable for inter-company contract	This must be a valid business unit ID.	Required if a business unit name isn't passed.	Not required
ProviderBuName	The provider business unit name. This is applicable for inter-company contract.	This must be a valid business unit name.	Required if a business unit ID isn't passed.	Not required
RcvrBusinessUnitId	The receiver business unit ID. This is applicable for inter-company contract.	This must be a valid business unit ID.	Required if a business unit name isn't passed.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Internal Attribute Record	Updating an Existing Contract Line Internal Attribute Record
RcvrBuName	The receiver business unit name. This is applicable for inter-company contract.	This must be a valid business unit name.	Required if a business unit ID isn't passed.	Not required
ReceiverProjectId	The receiver project ID. This is applicable for inter-company and inter-project contracts.	This must be a valid project ID.	Required if a project number isn't passed.	Not required
ReceiverProjectNumber	The receiver project number. This is applicable for inter-company and inter-project contracts.	This must be a valid project number.	Required if a project ID isn't passed.	Not required
ReceiverTaskId	The receiver task ID. This is applicable for inter-company and inter-project contracts.	This must be a valid task ID.	Required if a task number isn't passed.	Not required
ReceiverTaskNumber	The receiver task number. This is applicable for inter-company and inter-project contracts.	This must be a valid task number.	Required if a task ID isn't passed.	Not required

You can view the contract line internal attribute object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Line Internal Attribute** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Line Internal Attribute from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Line Sales Credit Data

You can use Import Management to create or update Contract Line Sales Credit records.

To import Contract Line Sales Credit records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Line Sales Credit data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Line Sales Credit object, the attribute is Id.
- **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 Contract Line Sales Credit object, the attributes are Sales Credit PUID and Line PUID.

Required Attributes and Validations for the Contract Line Sales Credit Object

To import data successfully into Oracle Applications 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 Contract Line Sales Credit records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Line Sales Credit import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Sales Credit Record	Updating an Existing Contract Line Sales Credit Record
LinePuid	The unique PUID that identifies the contract line	This must be a valid contract line PUID.	Required	Not required
SalesCreditPuid	The unique ID that identifies a sales credit record	This must be a unique PUID for all sales credit records.	Required	Required
Percent	The percent credit obtained by a sales person	This must be less than or equal to 100%.	Required	Not required
SalesrepId	The unique identifier for a sales person	This must be a valid sales person.	Required if SalesrepName isn't entered.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Sales Credit Record	Updating an Existing Contract Line Sales Credit Record
SalesrepName	The name that identifies the sales person	This must be a valid sales person.	Required if SalesrepId isn't entered.	Not required
SalesCreditTypeId	The unique identifier for the sales credit type	To manage your sales credit types: 1. In Setup and Maintenance, go to the Manage Standard Lookups task. 2. Search for the Sales Credit Type lookup.	Required if SalesCreditType isn't entered	Not required
SalesCreditType	The name that identifies the sales credit type	To manage your sales credit types: 1. In Setup and Maintenance, go to the Manage Standard Lookups task. 2. Search for the Sales Credit Type lookup.	Required if SalesCreditTypeId isn't entered	Not required

You can view the Contract Line Sales Credit object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Line Sales Credit** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Line Sales Credit from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Line Translation Data

You can use the import functionality to create, update, or delete your contract line translation data.

You can import contract line translation records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the contract line translation data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import contract line translation data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the contract line translation import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

If you want to import only a few records, then you can create a single CSV file for all contract line translation attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the contract line translation child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contract line translation or are updating contract line translation that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contract Line Translation Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for contract line translation records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Translation record	Updating an Existing Contract Line Translation record
LinePuid	The PUID of the contract line for which the translation information is captured.	Must be a valid contract PUID.	Required	Required
Lang	The language in which the translation is captured.	Must be a valid language.	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the contract line translation object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Contract Line Translation object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the contract line translation information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Contract Line Translation** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.

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

6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Contract Manual Adjustments Data

You can use Import Management to create or update Contract Manual Adjustments records.

To import Contract Manual Adjustments records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Manual Adjustments data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. 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 Contract Manual Adjustments object, the attribute is SequenceNumber.

Required Attributes and Validations for the Contract Manual Adjustments Object

To import data successfully into Oracle Applications 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 Contract Manual Adjustments records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Manual Adjustments import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Manual Adjustments Record	Updating an Existing Contract Manual Adjustments Record
ExtSource	The external source identifying a manual adjustment	This must be a unique value across the Adjustments table.	Required	Required
ExtKey	The external key identifying a manual adjustment	This must be a unique value across the Adjustments table.	Required	Required
ChargeExtSource	The external source of a charge	This must be a valid charge external source.	Required	Not required
ChargeExtKey	The external key of the charge	This must be a valid charge external key.	Required	Not required
SequenceNumber	The sequence number of the adjustment	No validation	Not required	Not required
AdjustmentTypeCode	The adjustment type code	This must be a valid adjustment code.	A value is required if the adjustment type isn't passed.	Not required
AdjustmentType	The adjustment type	This must be a valid adjustment name.	A value is required if the adjustment type code isn't passed.	Not required
AdjustmentValue	The adjustment value	No validation	Required	Not required
ReasonCode	The code representing the reason for the adjustment	This must be a valid reason code.	A value is required if the reason in not passed.	Not required
Reason	The reason for the adjustment	This must be a valid reason name.	A value is required if the reason code isn't passed.	Not required
ChargePeriodFrom	The charge period from which the adjustment is effective	This must be within the line start and end dates.	Not required	Not required
ChargePeriodUntil	The charge period until which the adjustment is effective	This must be within the line start and end dates.	Not required	Not required

You can view the Contract Manual Adjustments object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Manual Adjustments** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Manual Adjustments from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Party Data

You can use Import Management to create or update Contract Party records.

To import Contract Party records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Party data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Party object, the attributes are Id and Party Id.
- **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 Contract Party object, the attributes are Party Number, Party Role PUID, and Contract PUID.

Required Attributes and Validations for the Contract Party Object

To import data successfully into Oracle Applications 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

Contract Party records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Party import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Record	Updating an Existing Contract Party Record
ContractPuid	The unique PUID that identifies the contract.	This must be a valid Contract PUID.	Conditionally Required. Provide a value if Id isn't provided.	Not required
Id	The unique identifier of the contract.	This must be a valid identifier.	Conditionally Required. Provide a value if ContractPuid isn't provided.	Not required
PartyRolePuid	The unique identifier for the party record	This must be a unique PUID for all contract party records.	Required	Required
PartyRoleCode	The code that represents a party role	This must be a valid party role code defined for the contract type.	Required if the Role isn't entered.	Not required
Role	The name that represents a party role	This must be a valid party role defined for the contract type.	Required if the PartyRoleCode isn't entered.	Not required
PartyId	The unique identifier for a party	This must be a valid party - HZ_PARTIES.	Required if PartyName isn't entered or if there is more than one party with the same party name.	Not required
PartyName	The name that represents a party	This must be a valid and unique party name - HZ_PARTIES. If there is more than one party with the same party name, then you must provide PartyId.	Required if PartyId isn't entered	Not required

You can view the Contract Party object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Party** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Party from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Party Contact Data

You can use Import Management to create or update Contract Party Contact records.

To import Contract Party Contact records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Party Contact data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Party Contact object, the attributes are Id and Contact Id.
- **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 Contract Party Contact object, the attribute is Contact PUID.

Required Attributes and Validations for the Contract Party Contact Object

To import data successfully into Oracle Applications 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 Contract Party Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Party Contact import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Contact Record	Updating an Existing Contract Party Contact Record
PartyRolePuid	The unique identifier of the party record.	No validation	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Contact Record	Updating an Existing Contract Party Contact Record
ContactPuid	The unique identifier of the party contact record.	No validation	Required	Required
ContactRoleCode	The role played by the contact in this contract.	OKC_PARTY_CONTACT_SOURCES.CONTACT_ROLE_CODE	Required if the role isn't entered	Required
Role	The name of the role played by the contract in this contract.	No validation	Required if ContactRoleCode isn't entered	Not required
ContactId	The unique identifier of the contract party contact.	HZ_RELATIONSHIPS	Required if PartyContactName isn't entered	Not required
PartyContactName	The name of the contract party contact.	Valid name as per HZ_PARTIES record	Required if ContactId isn't entered	Not required
OwnerYn	Indicates whether the contact is a contract owner	The values must be either YES or NO.	Required	Not required
AccessLevel	The access level of a team member.	This must be one among FULL, READ, or NO_ACCESS.	Required if AccessLevelName isn't entered	Not required
AccessLevelName	The access level of a team member.	This must be one among Full, Read, or No Access.	Required if AccessLevel isn't entered	Not required

You can view the Contract Party Contact object 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.

Note: Prior to the 20B release, the logged in user was getting defaulted as the contract owner for a contract automatically. From the 20B release, the logged in user won't get defaulted automatically when you import the contract header. You need to specify the contract owner information in the Contract Party Contact CSV file and import it.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Party Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Party Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Party Descriptive Flexfield Data

You can use Import Management to create or update Contract Party Descriptive Flexfield records.

To import Contract Party Descriptive Flexfield records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Contract Party Descriptive Flexfield data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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.
- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contacts or are updating contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contract Party Descriptive Flexfield Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Contract Party Descriptive Flexfield records, required attributes for updating Contract Party Descriptive Flexfield records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Party Descriptive Flexfield import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Descriptive Flexfield Record	Updating an Existing Contract Party Descriptive Flexfield Record
Id	The unique identifier of the contract party record.	This must be a valid contract party Id.	Not required	Not required
PartyRolePuid	The unique PUID that identifies the contract party record.	This must be a valid contract party PUID.	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Descriptive Flexfield Record	Updating an Existing Contract Party Descriptive Flexfield Record
AttributeCategory	Attribute category of the descriptive flexfield	No validation	Not required	Not required
Attribute1	Attribute 1 of the descriptive flexfield	No validation	Required	Not required
Attribute2	Attribute 2 of the descriptive flexfield	No validation	Not required	Not required
Attribute3	Attribute 3 of the descriptive flexfield	No validation	Not required	Not required
Attribute4	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required
Attribute5	Attribute 5 of the descriptive flexfield	No validation	Not required	Not required

You can view the Contract Party Descriptive Flexfield 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Party Descriptive Flexfield** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Party Descriptive Flexfield from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Contract Party Contact Descriptive Flexfield Data

You can use Import Management to create or update Contract Party Contact Descriptive Flexfield records.

To import Contract Party Contact Descriptive Flexfield records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Contract Party Contact Descriptive Flexfield data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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.

- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contacts or are updating contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contract Party Contact Descriptive Flexfield Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Contract Party Contact Descriptive Flexfield records, required attributes for updating Contract Party Contact Descriptive Flexfield records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Party Contact Descriptive Flexfield import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Contact Descriptive Flexfield Record	Updating an Existing Contract Party Contact Descriptive Flexfield Record
Id	The unique identifier of the contract party contact record.	This must be a valid contract party contact Id.	Not required	Not required
ContactPuid	The unique PUID that identifies the contract party contact record.	This must be a valid contract party contact PUID.	Required	Required
AttributeCategory	Attribute category of the descriptive flexfield	No validation	Not required	Not required
Attribute1	Attribute 1 of the descriptive flexfield	No validation	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Party Contact Descriptive Flexfield Record	Updating an Existing Contract Party Contact Descriptive Flexfield Record
Attribute2	Attribute 2 of the descriptive flexfield	No validation	Not required	Not required
Attribute3	Attribute 3 of the descriptive flexfield	No validation	Not required	Not required
Attribute4	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required
Attribute5	Attribute 5 of the descriptive flexfield	No validation	Not required	Not required

You can view the Contract Party Contact Descriptive Flexfield 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Party Contact Descriptive Flexfield** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Party Contact Descriptive Flexfield from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Contract Pricing Terms Data

You can use Import Management to create or update Contract Pricing Term records.

To import Contract Pricing Term records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Pricing Terms data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the 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 Contract Pricing Terms object, the attributes are Line PUID and Pricing Terms PUID.

Required Attributes and Validations for the Contract Pricing Terms Object

To import data successfully into Oracle Applications 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 Contract Pricing Terms records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Pricing Terms import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Pricing Terms Record	Updating an Existing Contract Pricing Terms Record
AdjustmentAmount	The adjustment amount of a pricing term	No validation	Not required	Not required
AdjustmentType	The type of adjustment	To manage your adjustments: 1. In Setup and Maintenance, go to the Manage Standard Lookups task. 2. Search for Contract Price Adjustment Types lookup.	Required if AdjustmentTypeCode isn't entered	Not required
AdjustmentTypeCode	The code that represents the type of adjustment	To manage your adjustments: 1. In Setup and Maintenance, go to the Manage Standard Lookups task. 2. Search for Contract Price Adjustment Types lookup.	Required if AdjustmentType isn't entered	Not required
AllowCustomAdjustmentsFl	The option to indicate if custom adjustments are permitted.	The valid values are Yes or No.	Not required	Not required
LinePuid	The PUID of the contract line	This must be a valid line PUID	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Pricing Terms Record	Updating an Existing Contract Pricing Terms Record
ListPrice	The list price	No validation	Not required	Not required
PricingTermsPuid	The PUID of the pricing term	This must be unique across pricing terms.	Required	Required

You can view the Contract Pricing Terms object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Pricing Terms** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Pricing Terms from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Related Document Data

You can use Import Management to create or update Contract Related Document records.

To import Contract Related Document records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Related Document data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Contract Related Document object, the attributes are Id, Contract Id, and Related Contract Id.

- **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 Contract Related Document object, the attributes are Related Object PUID, Contract PUID, and RelatedContractPUID.

Required Attributes and Validations for the Contract Related Document Object

To import data successfully into Oracle Applications 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 Contract Related Document records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Related Document import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Related Document Record	Updating an Existing Contract Related Document Record
RelObjPuid	Unique PUID of the related contract record.	No validation	Required	Required
ContractPuid	The PUID of the source contract.	This must be a valid source contract PUID.	Required	Not required
RelatedContractPuid	The PUID of the target contract.	This must be a valid target contract PUID.	Required	Not required
RelationshipCode	The code that represents the relationship between the two contracts	You can manage the relationships. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Contract Relationship Types	Required if Relationship isn't entered	Not required
Relationship	The name that represents the relationship between the two contracts	You can manage the relationships. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales	Required if RelationshipCode isn't entered	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Related Document Record	Updating an Existing Contract Related Document Record
		• Functional Area: Data Import and Export • Task: Manage Contract Relationship Types		

You can view the Contract Related Document object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Related Document** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Related Document from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Contract Sales Credit Data

You can use Import Management to create or update Contract Sales Credit records.

To import Contract Sales Credit records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Contract Sales Credit data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications

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 Contract Sales Credit object, the attribute is Id.

- **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 Contract Sales Credit object, the attributes are Sales Credit PUID and Contract PUID.

Required Attributes and Validations for the Contract Sales Credit Object

To import data successfully into Oracle Applications 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 Contract Sales Credit records, prerequisite setup tasks for the attributes, and specific validations, if any, for Contract Sales Credit import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Sales Credit Record	Updating an Existing Contract Sales Credit Record
ContractPuid	The unique PUID that identifies the contract	This must be a valid contract PUID.	Required	Not required
SalesCreditPuid	The unique Id that identifies a sales credit record	This must be a unique PUID for all sales credit records.	Required	Required
Percent	The percent credit obtained by a sales person	This must be less than or equal to 100%.	Required	Not required
SalesrepId	The Id that identifies the sales person	This must be a valid sales person.	Required if the SalesrepName isn't entered	Not required
SalesrepName	The name that identifies the sales person	This must be a valid sales person.	Required if the SalesrepId isn't entered	Not required
SalesCreditTypeId	The unique identifier for the sales credit type	To manage your sales credit types: 1. In Setup and Maintenance, go to the Manage Standard Lookups task. 2. Search for the Sales Credit Type lookup.	Required if SalesCreditType isn't entered	Not required
SalesCreditType	The name that identifies the sales credit type	To manage your sales credit types: 1. In Setup and Maintenance, go to the Manage Standard Lookups task.	Required if SalesCreditId isn't entered	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Sales Credit Record	Updating an Existing Contract Sales Credit Record
		2. Search for the Sales Credit Type lookup.		

You can view the Contract Sales Credit object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the CSV templates available in the Import Objects UI page to create the source CSV file. To download a CSV template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Contract Sales Credit** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Contract Sales Credit from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Conversation Data

You can use Import Management to create, update, or delete Conversation records.

To import Conversation records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Conversation data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Conversation Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Conversation records, required attributes for updating Conversation records, prerequisite setup tasks for the attributes, and specific validations, if any, for Conversation import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Record	Updating an Existing Conversation Record	Deleting an Existing Conversation Record
ConversationId	The unique identifier of the conversation.	Must be a valid ConversationId when updating a conversation.	Not Required	Conditionally Required. Provide value if the ConversationNumber isn't provided.	Conditionally Required. Provide value if the ConversationNumber isn't provided.
ConversationNumber	The public unique identifier of the conversation.	Must be a valid ConversationNumber when updating a conversation.	Not Required	Conditionally Required. Provide value if the ConversationId isn't provided.	Conditionally Required. Provide value if the ConversationId isn't provided.
StripeCd	The application stripe of the conversation.	Must be a valid application stripe. Valid values are: ORA_SVC_CRM, ORA_SVC_HCM, ORA_SVC_HRHD, ORA_SVC_ISR	Not Required. If not passed, it will be defaulted to ORA_SVC_CRM.	Not Required	Not Required
ConversationStatusCd	The status of the conversation.	Must be a valid conversation status. Valid values are: ORA_SVC_OPEN, ORA_SVC_CLOSED.	Not Required. If not passed, it will be defaulted to ORA_SVC_OPEN.	Not Required	Not Required
PrimaryMessageNumb	The public unique identifier of the primary message in the conversation.	None	Not Required	Not Required	Not Required
BUOrgId	The identifier of the business unit.	None	Not Required	Not Required	Not Required

You can view the Conversation 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.

Note: You can pass any attribute with a valid value to create a conversation.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Conversation** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Conversation from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Conversation Message Data

You can use Import Management to create, update, or delete Conversation Message records.

To import Conversation Message records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Conversation Message data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Conversation Message Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Conversation Message records, required attributes for updating Conversation Message records, prerequisite setup tasks for the attributes, and specific validations, if any, for Conversation Message import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Message Record	Updating an Existing Conversation Message Record	Deleting an Existing Conversation Message Record
MessageId	The unique identifier of the conversation message.	Must be a valid MessagesId when updating a conversation message.	Not Required	Conditionally Required. Provide value if the MessagesNumber isn't provided.	Conditionally Required. Provide value if the MessagesNumber isn't provided.
MessageNumber	The public unique identifier of the conversation message.	Must be a valid MessagesNumber when updating a conversation message.	Not Required	Conditionally Required. Provide value if the MessagesId isn't provided.	Conditionally Required. Provide value if the MessagesId isn't provided.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Message Record	Updating an Existing Conversation Message Record	Deleting an Existing Conversation Message Record
ParentMessageNumber	The public unique identifier of the parent message.	Must be a valid message number.	Only if you want to create parent-child relationship between messages.	Not Required	Not Required
MessageStatusCd	The status of the conversation message.	Valid values are: ORA_SVC_DRAFT, ORA_SVC_COMMITTED, ORA_SVC_CORRECTED.	Not Required. If not passed, it will be defaulted to ORA_SVC_COMMITTED.	Not Required	Not Required
MessageTypeCd	The type of the conversation message.	Valid values are: ORA_SVC_INBOUND, ORA_SVC_OUTBOUND, ORA_SVC_NOTE, ORA_SVC_SYSTEM_REPLY, ORA_SVC_SYSTEM_NOTE, ORA_SVC_INTERNAL_COLLABORATION.	Required	Not Required	Not Required
MessageContent	The content of the message.	It must by passes in base 64 encoded value.	Required	Not Required	Not Required
InboundStatusCd	The status of the message if the conversation message is an inbound message.	Valid values are: ORA_SVC_NEW, ORA_SVC_REPLIED.	Not Required. If not passed, it will be defaulted to ORA_SVC_NEW.	Not Required	Not Required

You can view the Conversation Message 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Conversation Message** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Conversation Message from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**.
   You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Conversation Message Recipient Data

You can use Import Management to create, update, or delete Conversation Message Recipient records.

To import Conversation Message Recipient records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Identify the target object attributes that are required in the CSV file for a successful import.
- Ensure parent records exist before importing child records.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Conversation Message Recipient Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Conversation Message Recipient records, required attributes for updating Conversation Message Recipient records, prerequisite setup tasks for the attributes, and specific validations, if any, for Conversation Message Recipient import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Message Recipient Record	Updating an Existing Conversation Message Recipient Record	Deleting an Existing Conversation Message Recipient Record
MessagesId	The unique identifier of the message.	Must be a valid Conversation Message Identifier.	Conditionally Required. Provide value if the MessagesNumber isn't provided.	Not Required	Not Required
MessagesNumber	The public unique identifier of the message.	Must be a valid Conversation Message PUID.	Conditionally Required. Provide value if the MessagesId isn't provided.	Not Required	Not Required
RecipientId	The unique identifier of the message recipient record.	Must be a valid RecipientId when updating a message recipient.	Not Required	Conditionally Required. Provide value if the RecipientNumber isn't provided.	Conditionally Required. Provide value if the RecipientNumber isn't provided.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Message Recipient Record	Updating an Existing Conversation Message Recipient Record	Deleting an Existing Conversation Message Recipient Record
RecipientNumber	The public unique identifier of the message recipient record.	Must be a valid RecipientNumber when updating a message recipient.	Not Required	Conditionally Required. Provide value if the RecipientId isn't provided.	Conditionally Required. Provide value if the RecipientId isn't provided.
RecipientPartyId	The party identifier of the message recipient.	Must be a valid party identifier.	Not Required. Recommend to pass one of RecipientPartyId, RecipientPartyNumber, or FreeFormAddress.	Not Required	Not Required
RecipientPartyNumber	The public unique identifier of the message recipient.	Must be a valid Party PUID.	Not Required. Recommend to pass one of RecipientPartyId, RecipientPartyNumber, or FreeFormAddress.	Not Required	Not Required
RecipientTypeCd	The type of the message recipient, such as TO, CC, BCC.	Valid values are: ORA_SVC_BCC, ORA_SVC_CC, ORA_SVC_FROM, ORA_SVC_TO.	Not Required. If not passed, it will be defaulted to ORA_SVC_TO.	Not Required	Not Required
FreeFormAddress	The free form address of the recipient such as email address.	None	Not Required. Recommend to pass one of RecipientPartyId, RecipientPartyNumber, or FreeFormAddress.	Not Required	Not Required

You can view the Conversation Message Recipient object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Conversation Message Recipient** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Conversation Message Recipient from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**.
   You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Conversation Reference Data

You can use Import Management to create, update, or delete Conversation Reference records.

To import Conversation Reference records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Identify the target object attributes that are required in the CSV file for a successful import.
- Ensure parent records exist before importing child records.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- Ensure parent records exist before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Conversation Reference Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Conversation Reference records, required attributes for updating Conversation Reference records, prerequisite setup tasks for the attributes, and specific validations, if any, for Conversation Reference import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Reference Record	Updating an Existing Conversation Reference Record	Deleting an Existing Conversation Reference Record
ReferenceId	The unique identifier of the conversation reference.	Must be a valid ReferenceId when updating a conversation reference.	Not Required	Conditionally Required. Provide value if the ReferenceNumber isn't provided.	Conditionally Required. Provide value if the ReferenceNumber isn't provided.
ReferenceNumber	The public unique identifier of the conversation reference.	Must be a valid ReferenceNumber when updating a conversation reference.	Not Required	Conditionally Required. Provide value if the ReferenceId isn't provided.	Conditionally Required. Provide value if the ReferenceId isn't provided.
ObjectTypeCd	The object type of the functional object such as Service Request, Sales Lead, and so on.	Valid values are: ORA_SVC_SERVICE_ REQUESTS, ORA_ SVC_SERVICE_ REQUESTS_HRHD, ORA_SVC_SERVICE_ REQUESTS_ISR, ORA_ MKL_LM_LEADS, ORA_ZMM_ACTY_	Required	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Conversation Reference Record	Updating an Existing Conversation Reference Record	Deleting an Existing Conversation Reference Record
		ACTIVITIES, ORA_ MOO_OPTY, ORA_ HZ_ORGANIZATION_ PROFILES.			
ObjectId	The unique identifier of the functional object associated with the conversation.	Must be a valid function object ID such as Sales Lead ID, Service Request ID, and so on.	Conditionally Required. Provide value if the ObjectNumber isn't provided.	Not Required	Not Required
ObjectNumber	The public unique identifier of the functional object associated with the conversation.	Must be a valid function object number such as SR PUID, Lead PUID, and so on.	Conditionally Required. Provide value if the ObjecId isn't provided.	Not Required	Not Required
ConversationId	The conversation reference identifier, an auto generated number and primary key for this table.	Must be a valid ConversationId.	Conditionally Required. Provide value if the ConversationNumber isn't provided.	Not Required	Not Required
ConversationNumber	The public unique identifier of the conversation Reference.	Must be a valid conversation PUID.	Conditionally Required. Provide value if the ConversationId isn't provided.	Not Required	Not Required

You can view the Conversation Reference object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Conversation Reference** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Conversation Reference from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Country Structure Data

Import Your Country Structure Data

You can use Import Management to create Country Structure records. It is recommended you use Import Management only if you're importing high-volume third-party data.

If you 're importing licensed data from one of our vendors, then you can create the country structure by navigating to **Setup and Maintenance** > **Manage Geographies Task** page.

To import Country Structure records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Country Structure data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Identify the target object attributes that are required in the CSV file for a successful import.

Required Attributes and Validations for Country Structure Object

To import data successfully into Oracle Applications Cloud, your CSV file must include values for the required attributes. This table lists the required attributes for importing new Country Structure records, prerequisite setup tasks for the attributes, and specific validations, if any, for Country Structure import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Country Structure Record
CountryCode	The code for the country for which the country structure is applicable.	The GeographyType has to be "Country" and the LevelNumber has to be "1" for a country. You can't pass different country codes when importing a record.	Yes
GeographyType	Geopolitical divisions such as Country, State, City, and so on. For example, for US the different geography types would be State, County, City, and Postal Code. For India, the different geography types would be State, District, City, and Postal Code. For Mexico, it would be State, Municipality, Locality, and Postal Code.	The country has to be present.	Yes
LevelNumber	You need these to create parent-child relationships between geography types for your country. The values can be 1, 2, 3, and so on.	To define a country, you must specify the LevelNumber as 1.	Yes

You can view the Country Structure object and 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 the Manage Import Objects page. You can view the list of valid values for country codes in the UI by navigating to the Manage Geographies task and searching with % as the Country Code value. For more information on Geographies, see Overview of Geographies, Geographic Entities, and Locations in the Related Topics section.

Note: Note the following:

- The import job will fail if you try to load any already existing country structure. Delete the existing country structure in the UI in Manage Geographies Tasks and import again.
- You can't load additional lower geography structure levels for an existing country structure while importing geography country structure. You can add additional geography levels in the UI for an existing country structure in the Manage Geographies task page.

Create the Source CSV File

You include the data that you want to import into Oracle Applications Cloud in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Country Structure** object in the table and click **Download**.

You can now edit the downloaded file and provide values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Country Structure from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Click **Validate Data** to check the file for unmapped columns or data format issues. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity. Here, you can download and review the successfully imported user data records, the mapping details used for import activity, and the data file that you provided in CSV format.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?
- Overview of Geographies, Geographic Entities, and Locations
- How do I manage geography validation?

Example of Importing Country Structure Data

You use the country structure of a country to define which geography types are part of the country and how the geography types are hierarchically related within the country.

For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure.

To add a country structure using import management, your source file must contain information about the country to which the country structure belongs. You can view the list of valid values for country codes in the UI by navigating to the Manage Geographies task and searching with % as the Country Code value. You also need to specify the level at which the geography types need to be placed. By default, all countries are at Level 1. You create the country structure by increasing the level number as you go down the country structure. You place the geography types such as states, provinces, and so on at Level 2, districts or counties at Level 3, and so on. To add a country structure, your source file must include the values that let the import process identify the existing records.

Sample Input CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file. Here is a sample input CSV file for country as US.

CountryCode	LevelNumber	GeographyType
US	1	COUNTRY
US	2	STATE
US	3	COUNTY
US	4	CITY
US	5	POSTAL CODE

Here is another input CSV file for importing the country structure for India.

CountryCode	LevelNumber	GeographyType
IN	1	COUNTRY

CountryCode	LevelNumber	GeographyType
IN	2	STATE
IN	3	DISTRICT
IN	4	CITY
IN	5	POSTAL CODE

In case you want to import the country structure for Mexico, your input CSV file would look like this:

CountryCode	LevelNumber	GeographyType
MX	1	COUNTRY
MX	2	STATE
MX	3	MUNICIPALITY
MX	4	LOCALITY
MX	5	POSTAL CODE

In this example, we are importing the Country Structure for US. You must create a source file (CSV) file with the attributes as shown in this table and import it using Import Management.

Attribute Name	Value	Description
CountryCode	US	The code for the country for which the country structure is applicable.
LevelNumber	1	The level number of the geography in the hierarchy. For example, Country is at Level 1 (Top level) and State (California) is at Level 2. You need these to create parent-child relationships between geography types for your country.
GeographyType	COUNTRY	Geopolitical divisions such as Country, State, City, and so on. For example, for US the different geography types would be State, County, City, and Postal Code. For India, the different geography types would be State, District, City, and Postal Code. For Mexico,

Attribute Name	Value	Description
		it would be State, Municipality, Locality, and Postal Code.

Create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Country Structure** from the Object drop-down list.

   > **Note:** In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.

4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit**.

Import Your Deal Product Data

You can use Import Management to create, update, or delete your deal product data.

To import Deal Product records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Deal Product data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records. For example, when importing the address of an account, ensure the account exists.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Deal Product object, this attribute is DealProdId.
- **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 Deal Product object, the attribute is DealProdNumber.

Review Required Attributes and Validations for Deal Product Object

To import data successfully into Oracle Applications 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 Deal Product records, required attributes for updating Deal Product records, prerequisite setup tasks for the attributes, and specific validations, if any, for Deal Product import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Deal Product record	Updating an Existing Deal Product record
DealNumber	The public unique identifier value for the deal.	Text	30	You can obtain the Deal Number for an existing deal registration from the Deal Registration work area.	Conditionally required Provide either the DealId or the DealNumber to identify the deal.	Conditionally required Provide either the DealId or the DealNumber to identify the deal.
DealId	The unique ID for the existing deal record in the destination table..	Number	18	The deal must exist.	Conditionally required Provide either the DealId or the	Conditionally required Provide either the DealId or the

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Deal Product record	Updating an Existing Deal Product record
					DealNumber to identify the deal.	DealNumber to identify the deal.
DealProdNumber	The relationship between the deal registration and the deal product.	Text	30	You can obtain the DealProductNumbe for an existing deal registration product from the Deal Registration work area.	Required	Conditionally required Provide either the DealId or the DealNumber to identify the deal.
ProductGroupNumb	The public unique identifier value for the deal registration product group.			You can obtain the ItemNumber for an existing deal registration product from the Deal Registration work area.	Conditionally required When you import a new deal registration product item (as opposed to a product group), then you must provide either the ProductGroupNumb or the ProductGroupId.	Conditionally required When you import a new deal registration product item (as opposed to a product group), then you must provide either ProductGroupNumber or ProductGroupId
DealProdId	The unique ID for the existing deal product record in the destination table.	Number	18	The deal product must exist.	Not required	Conditionally required You must provide either the DealProductId or the DealProductNumber to identify the product.
ItemNumber	The public unique identifier value for the deal registration product item.	Text	30	You can obtain the ItemNumber for an existing deal registration product from the Deal Registration work area.	Conditionally required When you import a new deal registration product item (as opposed to a product group), then you must provide either the ItemNumber or the InventoryItemId.	Conditionally required When you update deal registration product item (as opposed to a product group), then you must provide either ItemNumber or InventoryItemId.
InventoryItemId	The unique ID for the existing sales catalog product	Number	18	You can determine the InventoryItemId by exporting the	Conditionally required	Conditionally required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Deal Product record	Updating an Existing Deal Product record
	(item) record in the destination table.			Product Group Products object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	When you import a new deal registration product item (as opposed to a product group), then you must provide either the ItemNumber or the InventoryItemId.	When you update deal registration product item (as opposed to a product group), then you must provide either ItemNumber or InventoryItemId.
ProductGroupId	Unique Product Group ID defined in sales product catalog.	Number	18	You can determine the ProdGroupId by exporting the Product Group Products object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally required When you import a new deal registration product item (as opposed to a product group), then you must provide either the ItemNumber or the InventoryItemId.	Conditionally required When you update deal registration product item (as opposed to a product group), then you must provide either ItemNumber or InventoryItemId.
UomCode	Specifies the Unit of measure	Number	None	You can determine the units of measure. Navigate to the following in the Setup and Maintenance work area: • Offering: Financials • Functional Area: Items • Task: Manage Units of	Conditionally required A value is required when you import a new deal registration that's associated with product (Items).	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Deal Product record	Updating an Existing Deal Product record
				Measure Profiles		
RegisteredPrice	The value for the price of the product item associated to the deal registration.	Number	None	You can obtain the RegisteredPrice for an existing deal registration using the Deal Registration work area.	Not required	Not required
InvOrgId	The unique ID for the existing product item organization's record in the destination table.	Number	18	You can determine the InvOrgId by exporting the Product Group Products object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally required A value is required when you import a new deal registration that's associated with product (Items).	Conditionally required A value is required when you update an existing deal registration that's associated with product (Items), and you don't provide the product's ID (`InventoryItemId`).

You can view the Deal Product 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Deal Product** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Deal Product from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?

Import Your Deal Registration Data

You can use import management to create or update Deal Registration records.

To import Deal Registration records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Deal Registrations. You can determine the internal ID of a record by exporting Oracle Applications 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 Deal Registration object, the attribute is DealID.
- 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 Deal Registration object, the attributes are:
    - AccountPartyNumber
    - ContactPartyNumber
    - OwnerPartyNumber
    - MatchedAccountPartyNumber
    - MatchedContactPartyNumber
    - OptyNumber
    - LeadNumber
    - PartnerCompanyNumber
    - ProgramEnrollmentNumber
    - DealNumber

Required Attributes and Validations for Deal Registration Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Deal Registration records, required attributes for updating Deal Registration records, prerequisite setup tasks for the attributes, and specific validations, if any, for Deal Registration import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Deal Registration Record	Updating an Existing Deal Registration Record
AccountPartyNumber	The public unique identifier of account party on the deal registration	None	Required	Not required
ContactPartyNumber	The public unique identifier of contact party on the deal registration	None	Required	Not required
OwnerPartyNumber	The public unique identifier of owner party on the deal registration	None	Required	Not required
MatchedAccountPartyNumb	The public unique identifier of the matched account party on the deal registration	The deal registration should have the status "Approved".	Not required	Not required
MatchedContactPartyNumb	The public unique identifier of the matched contact party on the deal registration	The deal registration should have the status "Approved".	Not required	Not required
OptyNumber	The public unique identifier of the opportunity associated with the deal registration	The deal registration should have the status "Approved".	Not required	Not required
LeadNumber	The public unique identifier of the lead associated with the deal registration.	The deal registration should have an associated lead.	Not required	Not required
PartnerCompanyNumber	The unique identifier of the partner associated with the deal registration	None	Required	Not required
ProgramEnrollmentNumber	The unique identifier of the partner program enrollment in the context of the deal registration	The partner associated with the deal registration should be enrolled in a program.	Not required	Not required
DealID	The unique identifier of the deal registration.	None	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Deal Registration Record	Updating an Existing Deal Registration Record
DealNumber	The alternate identifier of the deal registration.	None	Required	Not required

You can view the Deal Registration 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Deal Registration** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Deal Registration from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Deal Resource Data

You can use the Import Management to create, update, or delete deal resource records.

To import Deal Resource records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Deal Resource data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 Begin

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications

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 Deal Resource object, this attribute is DealResourceId.

- **Public unique identifiers**: If you're creating 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 Deal Resource object, the attribute is DealResourceNumber.

Required Attributes and Validations for Deal Resource Object

To import data successfully into Oracle Applications 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 Deal Resource records, required attributes for updating Deal Resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for Deal Resource import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Deal Resource record	Updating an Existing Deal Resource record
DealId	The unique ID for the existing deal record in the destination table.	Number	18	The deal must exist.	Conditionally required Provide either the DealId or the DealNumber to identify the deal.	Conditionally required Provide either the DealId or the DealNumber to identify the deal.
DealNumber	The public unique identifier value for the deal.	Text	30	You can obtain the Deal Number for an existing deal registration from the Deal Registration work area.	Conditionally required Provide either the DealId or the DealNumber to identify the deal.	Conditionally required Provide either the DealId or the DealNumber to identify the deal.
DealResourceNumb	The unique identifier for the relationship between the resource and the deal registration.	Number	18	You can obtain the DealResourceNumb for an existing deal registration product from the Deal Registration work area.	Required	Conditionally required Provide either the DealResourceId or the DealResourceNumber to identify the resource.
DealResourceId	The unique ID for the existing deal product record in the destination table.	Number	18	The deal resource must exist.	Not required	Conditionally required You must provide either the DealResourceId or the DealResourceNumber

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Deal Resource record	Updating an Existing Deal Resource record
						to identify the resource.
ResourcePartyNuml	The public unique identifier value for the resource party record.	Number	18	You can obtain the ResourcePartyNuml for a resource associated with an existing deal registration from the Deal Registration work area.	Conditionally required You must provide one of the following to identify the resource: • ResourceParty • ResourceParty • combination of ResourceParty and ResourceParty	Conditionally required You must provide one of the following to identify the resource: • ResourcePartyNumber • ResourcePartyId • combination of ResourcePartyOrigSys and ResourcePartyOrigSysRe
ResourcePartyId	The unique ID for the existing deal resource record in the destination table.	Number	18	The resource must exist.	Conditionally required Provide either the ResourcePartyNuml or the ResourcePartyId to identify the resource.	Conditionally required Provide either the ResourcePartyNumber or the ResourcePartyId to identify the resource.

You can view the Deal Resource 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Deal Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Deal Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Eligibility Rule Data

You can use the Import Management to create or update Eligibility Rule records.

To import Eligibility Rule records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Eligibility Rule object, this attribute is EligibilityRuleId.
- 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 Eligibility Rule Item object, the attributes are ParPGReferenceNumber, ItemNumber, and GeographyCode.

Required Attributes and Validations for Eligibility Rule Object

To import data successfully into Oracle Applications 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 Eligibility Rule records, required attributes for updating Eligibility Rule records, prerequisite setup tasks for the attributes, and specific validations, if any, for Eligibility Rule import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Eligibility Rule Record	Updating an Existing Eligibility Rule Record
EligibilityRuleId	Autogenerated Id to update the record.	Long	18	No validation	Not Required	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Eligibility Rule Record	Updating an Existing Eligibility Rule Record
RuleType	This can have only two values - AVAILABLE and NOTAVAILABLE.	String	30	No validation	Required	Not Required
StartDate	The start date of the eligibility rule	Date Time		The StartDate can't be greater than the EndDate	Not Required	Not Required
EndDate	The end date of the eligibility rule	Date Time		No validation	Not Required	Not Required
ProductNumber	Product number against which this eligibility rule is created or updated	String	300	No validation	Required	Required
ProdGroupId	Required if creating a new eligibility rule using the Internal ID	Long	18	No validation	Required	Not Required
ParPGReferenceNur	Required if creating or updating an existing eligibility rule using the PUID	String	50	No validation	Required	Required
InventoryItemId	Required if creating a new eligibility rule using the Internal ID	Long	18	No validation	Required	Not Required
InvOrgId	Required if creating a new eligibility rule using the Internal ID	Long	18	No validation	Required	Not Required
GeographyId	Required if creating a new eligibility rule using the Internal ID	Long	18	There can't be more than one eligibility rule for the same country.	Required	Not Required
CountryName	Specify value to update the country for an existing eligibility rule using the PUID.	String		No validation	Not Required	Not Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Eligibility Rule Record	Updating an Existing Eligibility Rule Record
GeographyCode	Required if creating or updating an existing eligibility rule using the PUID.	String		There can't be more than one eligibility rule for the same country.	Required To create an Eligibility Rule for all the countries, specify the Geography code value as "ALL". To create an Eligibility Rule for a specific country (for example, USA), specify the Geography code value as "US".	Required When updating an Eligibility Rule with the PUID, if you update the Geography Code from "ALL" to "US", specify the value of Geography Code as "ALL" in the import CSV file. Specify the value as "United States" for the "CountryName" attribute.

You can view the Eligibility Rule 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Eligibility Rule** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Eligibility Rule from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Geography Data

How do I import Non-Oracle Licensed geography data?

You can use Import Management to create Geography data. It's recommended to use import management if you're importing Non-Oracle Licensed geography data or while loading your own geography from other vendors. You can also add alternate name or code to existing geographies with import. For more information see *Example of Importing Geography Data*.

To import Geography data, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Geography data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Create Country Structure before importing Geography data. For information on how to create Country Structure, see Import Your Country Structure and Example of Importing Country Structure in Related Topics Section.
- Identify the target object attributes that are required in the CSV file for a successful import as mentioned in the table Required Attributes and Validations for the Geography Object below.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data such as creating a country structure.

Required Attributes and Validations for the Geography Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide values for the attributes. The following table lists the required attributes for importing new Geography records, prerequisite setup tasks for the attributes, and specific validations, if any, for Geography import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Geography Record
CountryCode	The code of the country to which the geography belongs.	This is validated against the country structure to check if the structure is defined for this country.	Required
PrimaryGeographyName	The primary name of the geography.	This is validated against the name of country if geography type is 'Country' or LevelNumber is 1.	Required
RecordTypeCode	The record type code that represents the intent of the import data. The values are: • 0 - indicates the geography that already exists in the base table. • 1 - indicates the intent to create a new geography. • 2 - indicates the intent to add an alternate identifying name or code to an existing geography.	No Validation	Required
LevelNumber	The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.	The level should exist in the country structure.	Required
SourceID	The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.	None	Required
ParentSourceID	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child	None	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Geography Record
	relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.		

You can view the Geography object 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 Manage Import Objects page.

Note: Keep a note of the following:

- You can't update geographies via import.
- You can't add alternate names or alternate code of country via import. You can do so only via UI.
- Before adding a new alternate name, make sure that the alternate name does not exist with the same value for any other geography name.
- You can enable high-volume import for the Geography import object in the Manage Import Objects page.
- PrimaryGeographyCodeType and PrimaryGeographyCode can't be added after PrimaryGeographyName is created via import. You must create them together. Alternatively, you can add primaryGeographyCodeType and PrimaryGeographyCode from the UI after the import is complete.

Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Geography** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Geography from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Note: Geography names aren't translatable and are always displayed in the same language in which they were loaded irrespective of the language of the signed in user. If you need different options of display, you can use the alternative names option.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- Import Your Country Structure Data
- How do I import data?
- Example of Importing Country Structure Data
- Example of Importing Geography Data

Example of Importing Geography Data

This example demonstrates how to import data using Import Management.

In this example, you have a source file containing geography data that you want to import into the application to make the geography data available for real time address validation and tax purposes. A geography is any region with a boundary around it, regardless of its size. It might be a state, a country, a city, a county, or a ward.

Summary of the Tasks

You perform the following steps to create an import activity and activate the import:

1. Determine what information is in the source file.
2. Create and schedule the import activity.

Before You Start

1. You use the country structure of a country to define which geography types are part of the country. For more information about an example of importing a country structure, see the topic "Example of Importing Country Structure Data".
2. Ensure that Source ID values are unique for each row of data within a single import.
3. Ensure that all the parents of a child geography are included in your data file so that the child geography can be added. For example, if you originally imported US, CA, and San Francisco, and now you want to import the city of San Jose in CA, then your data file must include US, CA, and San Jose.

4. Check that your source data file has the correct values for the geography data that you have already loaded. For example, if your initial import included the value US for country and CA as state, and in a subsequent import you have California as a state, then your geography import creates two state records (CA and California) in the application data, with the US as the country parent.

Determine the Information in the Source File

The source geography data files must include a unique Source ID value for each row of data and Parent Source ID value for the parent of that row of data. You include the data that you want to import into CX Sales and Fusion Service in a source CSV file. A sample input CSV file for country as US is shown in this table.

RecordTypeCode	PrimaryGeography	CountryCode	LevelNumber	SourceId	ParentSourceId	LanguageCode
0	`United States`	US	1	1	<blank>	US
1	`California`	US	2	11	1	US
1	`San Mateo`	US	3	111	11	US
1	`Redwood City`	US	4	1111	111	US
1	`94065`	US	5	11111	1111	US

Here is a sample CSV file to import geographies with alternate name and code for country India:

RecordType	PrimaryGeogr	CountryCode	LevelNumber	SourceId	ParentSOurceI	IdentifierType	IdentifierSubT	IdentifierValue
0	`India`	IN	1	1				
1	`Karnataka`	IN	2	2	1			
1	`Bengaluru`	IN	3	3	2			
2	`Bengaluru`	IN	3	3	2	NAME	Standard_ Name	`Bangalore`
1	`Whitefield`	IN	4	4	3			
1	`560066`	IN	5	5	4			
2	`560066`	IN	5	5	4	CODE	ISO_ COUNTRY_ CODE	91

Note: Keep a note of the following:

- The hierarchy is modeled in the CSV file using the SourceId and ParentSourceId. The ParentSourceId for the Country Record (level Number 1) is always null.
- If defining an alternate name (`RecordTypeCode` = 2) for any level below the country (`LevelNumber` >1), ensure that the SourceId and ParentSourceId columns match the values for the original record respectively.
- You can't update geographies via import.
- You can't add alternate names or alternate code of country via import. You can do so only via UI.
- Before adding a new alternate name, make sure that the alternate name doesn't exist with the same value for any other geography name. You can check the existing values for alternate names in the Manage Geographies task page under Hierarchy Defined.
- You can find the list of IdentifierSubTypes in Manage Geography Lookups page in the UI.
- PrimaryGeographyCodeType and PrimaryGeographyCode can't be added after PrimaryGeographyName is created via import. You must create them together. Alternatively, you can add PrimaryGeographyCodeType and PrimaryGeographyCode from the UI after the import is complete.

You must create a source file (CSV) file with the attributes and import it using Import Management as shown in this table.

Attribute Name	Value	Description
RecordTypeCode	1	The record type code that represents the intent of the import data. The values are: • 0 - indicates the geography that already exists in the base table. • 1 - indicates the intent to create a new geography. • 2 - indicates the intent to add an alternate identifying name or code to an existing geography.
PrimaryGeographyName	India	This is the primary geography name. This will be marked as the primary name for the Geography and also displayed in the Manage Geographies Page.
CountryCode	IN	This indicates the Country Code for the country for which you're importing data.
LevelNumber	2	The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.
SourceId	2	The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.

Attribute Name	Value	Description
ParentSourceId	1	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.
IdentifierType	Name	The type of the identifier. It can be either Name or Code.
IdentifierSubtype	Standard_Name or Standard_Code	The IdentifierSubtype can be Standard_Name or Secondary_Name. The default value is Standard_Name. The valid Sub Types for Type "CODE" are FIPS_CODE, GEO_CODE, ISO_COUNTRY_CODE, PRIMARY_CITY, or UNKNOWN
IdentifierValue	Bangalore	The value of the identifier.

You can create an import activity, enter the import details, and schedule the import.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Geography** from the Object drop-down list.

    > **Note:** In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.

4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit**.

Import Your Goal Data

You can use Import Management to create update, or delete Goal records.

To import Goal records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Goal data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new goals or are updating goals that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Goal Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Goal records, required attributes for updating Goal records, prerequisite setup tasks for the attributes, and specific validations, if any, for Goal import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Goal Record	Updating an Existing Goal Record
GoalId	The unique identifier of the goal	No validation	Not required This is auto generated.	Conditionally required Either the GoalId or the GoalNumber is required.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Goal Record	Updating an Existing Goal Record
OwnerNumber	The unique alternate identifier of the resource who owns and manages the goal	The resource should exist.	Required This is auto defaulted to creator.	Not required
KPINumber	The unique alternate identifier of the KPI selected for the goal	The KPI should exist.	Required Either the KPIId or the KPINumber is required.	Not required
GoalName	The name of the goal	No validation	Required	Not required
OwnerId	The unique identifier of a valid employee resource who owns and manages the goal	The resource must exist.	Not required This is auto defaulted to creator.	Not required
KPIId	The unique identifier of the KPI selected for the goal	The KPI record should exist.	Either the KPIId or the KPINumber is required	Not required
StartDate	The start date of the goal	The current date and time or a future date	Required	Not required
EndDate	The end date of the contest	This must be later than the start date.	Required	Not required
Frequency	The interval of repetition of the goal such as daily, weekly, monthly, and so on	This must be a valid lookup code value from the lookupType ORA_ZCA_GOAL_FREQUENCY.	Required	Not required
GoalNumber	The unique alternate identifier for the goal	No validation	Not required This is auto generated.	Conditionally required Either the GoalId or the GoalNumber is required.

You can view the Goal 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Goal** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Goal from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Goal Participant Data

You can use Import Management to create update, or delete Goal Participant records.

To import Goal Participant records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Goal Participant data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new goal participants or are updating goal participants that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Goal Participant Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Goal Participant records, required attributes for updating Goal Participant records, prerequisite setup tasks for the attributes, and specific validations, if any, for Goal Participant import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Goal Participant Record	Updating an Existing Goal Participant Record
GoalParticipantId	The unique identifier of the goal participant	No validation	Not required This is auto generated.	Conditionally required A value is required if the composite key isn't used.
ResourceId	The unique identifier of the resource associated with the goal	The resource should exist.	Required Either the ResourceId or the ResourceNumber is required.	Not required This can be used as a composite key with the

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Goal Participant Record	Updating an Existing Goal Participant Record
				GoalId when the primary key isn't used
ResourceNumber	The unique alternate identifier of the resource associated with the goal	The resource should exist.	Required Either the ResourceId or the ResourceNumber is required.	Not required This can be used as a composite key with the GoalNumber when the primary key isn't used.
GoalId	The unique identifier of the goal	The goal should exist.	Required Either the GoalId or the GoalNumber is required.	Not required This can be used as a composite key with the ResourceId when the primary key isn't used.
GoalNumber	The unique alternate identifier for the goal	The goal should exist.	Required Either the GoalId or the GoalNumber is required.	Conditionally required This can be used as a composite key with ResourceNumber when the primary key isn't used.

You can view the Goal Participant 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Goal Participant** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Goal Participant from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

How do I import hierarchy data?

You can use the import management to create Hierarchy data.

The hierarchies supported are:

- Customer hierarchy
- Dun and Bradstreet hierarchy
- Trading Community Party hierarchy

To import Hierarchy records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Hierarchy data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identifying an object record is the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. Use this option only if you're updating Hierarchies. You can determine the internal ID of a record by exporting Oracle Applications 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 Hierarchy object, the attributes are TreeStructureCode, TreeCode, TreeName, and TreeVersionName.

Required Attributes and Validations for Hierarchy Object

To import data successfully into Oracle Applications 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 Hierarchy records, prerequisite setup tasks for the attributes, and specific validations, if any, for Hierarchy import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Hierarchy Record
TreeStructureCode	Unique identifier for a tree structure.	Varchar2	30	Seeded data needs to be present.	Required
TreeCode	User defined Identifier for the tree code.	Varchar2	30	No validation	Required
TreeName	Name of the tree	Varchar2	80	No validation	Required
TreeVersionName	Version Name of the tree	Varchar2	80	No validation	Required
LangCode	Indicates the code of the language into which the contents of the translatable columns are translated.	Varchar2	4	No validation	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Hierarchy Record
AsofDate	The date that's used to determine the tree version when you're updating a tree version.	Date		No validation	Optional

You can view the Hierarchy 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.

> **Note:** You can find TreeStructureCode values from the lookup type PARTY_HIERARCHY_TYPE. FND_TREE_NODE table holds the nodes of trees. Navigate to **Setup and Maintenance** > **Search Task** > **Manage Standard Lookups** and search lookup type as PARTY_HIERARCHY_TYPE. For more information see *Account Hierarchy Database Table*.

Create the Source CSV File

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

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

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Hierarchy** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. In the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Hierarchy** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

> **Note:** Initiate the Tree Flattening Service manually. Do one of the following:
> - From the navigator, select **Scheduled Processes**. In the Schedule New Process dialog, search for **Party Hierarchy Generation** and click **OK**.
> - From Setup and Maintenance, search and run the Trading Community Party Hierarchy Generation task.

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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics
- Potential Issues When Opening CSV Files in Excel
- How do I import data?

How do I import hierarchy member data?

You can use the import functionality to create or update Hierarchy Member records.

To import Hierarchy Member records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the 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 Hierarchy Member object, the attributes are:

- TreeStructureCode
- TreeCode
- PartyNumber
- ParentPartyNumber
- AsofDate

Required Attributes and Validations for Hierarchy Member Object

To import data successfully into Oracle Applications 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 Hierarchy Member records, required attributes for updating Hierarchy Member records, prerequisite setup tasks for the attributes, and specific validations, if any, for Hierarchy Member import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Hierarchy Member Record	Updating an Existing Hierarchy Member Record
TreeStructureCode	Unique identifier for a tree structure.	Varchar2	30	Seeded data needs to be present.	Required	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Hierarchy Member Record	Updating an Existing Hierarchy Member Record
TreeCode	User defined identifier for the tree code.	Varchar2	30	No validation	Required	Required
PartySourceSystem	Original System Id for the party.			An account needs to exist.	Required	Required
PartySourceSystem	Original System Reference for the party.			An account needs to exist.	Required	Optional
PartyId	Unique Id for the Party.	Number	18	An account needs to exist.	Required	Required
ParentPartyId	Unique Id for the Parent Party.	Number	18	An account needs to exist.	Required	Required
ParentPartySourceS	Original System Id for the parent party.	Varchar2	30	An account needs to exist.	Required	Optional
ParentPartySourceS	Original System Id for the parent party.	Varchar2	240	An account needs to exist.	Required	Optional
LabelShortName	Label Name based on the position in the tree hierarchy with respect to the child.	Varchar2	80	Seeded data has to exist.	Required	Optional
PartyNumber	Unique identification number for this party.	Varchar2	30	An account needs to exist.	Required	Optional
ParentPartyNumber	Unique identification number for this parent party.	Varchar2	30	An account needs to exist.	Required	Optional

You can view the Hierarchy 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

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

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Hierarchy Member** object in the table and click **Download**.

You must edit the template CSV file and provide valid values for the required attributes. You can attach different types of files, giving each file a specific description.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Hierarchy Member** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

   > **Note:** Initiate the Tree Flattening Service manually. Do one of the following:
   > - From the navigator, select **Scheduled Processes**. In the Schedule New Process dialog, search for **Party Hierarchy Generation** and click **OK**.
   > - From Setup and Maintenance, search and run the Trading Community Party Hierarchy Generation task.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Household Data

You can use Import Management to create or update Household records.

To import Household records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Household data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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.

> **Note:** You can't set an attribute value to NULL in optimized import (standard import with the option **Enable High-Volume Import** selected). However, when updating a record, you can change an attribute value from NOT NULL to NULL

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. Use this option only if you're updating Households. You can determine the internal ID of a record by exporting Oracle Applications 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 Household object, the attributes are OwnerPartyId and PartyId.
- **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 Household object, the attribute is PartyNumber.

Required Attributes and Validations for Household Object

To import data successfully into Oracle Applications 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 Household records, required attributes for updating Household records, prerequisite setup tasks for the attributes, and specific validations, if any, for Household import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Household Record	Updating an Existing Household Record
SourceSystem	The code representing the source system for the household	String	30	Identify the source system or configure source systems either by using the Manage Trading Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System Reference import object.	Optional	Required
SourceSystemRefer	The reference number or text representing the source system unique ID for the household	String	240	Identify the source system or configure source systems either by using the Manage Trading	Optional	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Household Record	Updating an Existing Household Record
				Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System Reference import object.		
PartyNumber	The public unique identifier of the party.	String	30	Identify the party number value by exporting the Household object.	Optional	Required
PartyId	The public unique identifier of the party	Long	18	Identify the party number value by exporting the Household object.	Optional	Required
Name	The name of the household	String	360	Identify the organization name of the resource by navigating to the Resource Directory.	Required.	Conditionally required
OwnerPartyId	Indicates the party ID of the resource who's designated as the owner of the household	Long	18	None.	Conditionally required.	Conditionally required

You can use the profile option ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE to control how address types are entered. By default this profile option is set to Yes, so you can enter multiple address types, during high-volume import of Account, Contact, and Household objects . You can disable this profile option to improve the import performance. When you set this profile option to No, you can enter only a single address type.

You can view the Household 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

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Household** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Household from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Hub Source System Reference Data

You can use Import Management to create or update Hub Source System Reference records.

To import Hub Source System Reference records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Hub Source System Reference data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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.
- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new hub source system reference records or are updating hub source system reference records that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Hub Source System Reference Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Hub Source System Reference records, required attributes for updating Hub Source System Reference records, prerequisite setup tasks for the attributes, and specific validations, if any, for Hub Source System Reference import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Hub Source System Reference Record	Updating an Existing Hub Source System Reference Record
OwnerEntityId	Internal identifier or primary key of a record that exists in the OSC table	If provided, it has to be an active primary key value from the table name provided for the OwnerEntityObject.	If you export data from the OSC table provided for the OwnerEntityObject, provide the primary key data to this attribute. If you can't provide this data, provide valid values	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Hub Source System Reference Record	Updating an Existing Hub Source System Reference Record
			for the combination of ExistingSourceSystem and ExistingSourceSystemRefere	
StartDateActive	The date on which the hub source system reference becomes valid.	If provided, this date should be earlier than the end date. If you don't specify a date, this defaults to the current date.	Optional	Optional
EndDateActive	The date on which the hub source system reference is no longer valid.	If provided, this date should be later than the start date. If you don't specify a date, this defaults to 12/31/4712.	Optional	Optional
SourceSystem	Specifies the original source system name	This has to be present in the HZ_ORIG_SYSTEMS_B table with the status "A".	Provide a valid value.	Conditionally required. Provide one of the following: • SourceSystemReferenceId • A combination of SourceSystem, SourceSystemReference and OwnerEntityObject
SourceSystemReferenceValu	Specifies the original source system reference text or number in the original source system	No validation	Provide a valid value.	Conditionally required. Provide one of the following: • SourceSystemReferenceId • A combination of SourceSystem, SourceSystemReference and OwnerEntityObject
OwnerEntityObject	Specifies the OSC table in which the record exists	This has to be a valid lookup code in the lookup type ORA_ZCH_OWNER_ ENTITY_OBJECT.	Provide a valid value.	Conditionally required. Provide one of the following: • SourceSystemReferenceId • A combination of SourceSystem, SourceSystemReference and OwnerEntityObject
SourceSystemReferenceId	Specifies the source system reference identifier. This is a primary key.	If provided, this has to be an active primary key value	Not required	Conditionally required.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Hub Source System Reference Record	Updating an Existing Hub Source System Reference Record
		from the table HZ_ORIG_SYS_REFERENCES.		Provide one of the following: • SourceSystemReferenceId • A combination of SourceSystem, SourceSystemReference and OwnerEntityObject
ExistingSourceSystem	Specifies the original source system name of data that exists in Oracle Engagement Cloud	This has to be present in the HZ_ORIG_SYSTEMS_B table with status "A".	If you can't provide the OwnerEntityID, provide a combination of ExistingSourceSystem and ExistingSourceSystemRefere values. Export the Source System Reference repository to obtain this value.	Not required
ExistingSourceSystemRefere	Specifies the original source system reference of data that exists in Oracle Engagement Cloud	No validation	If you can't provide the OwnerEntityID, provide a combination of ExistingSourceSystem and ExistingSourceSystemRefere values. Export the Source System Reference repository to obtain this value.	Not required

You can view the Hub Source System Reference 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.

Note: A lookup type ORA_ZCH_OWNER_ENTITY_OBJECT is now available. You can now use this lookup without specifying the underlying physical tables, when providing input data in the CSV import file. When you migrate from File-Based Data Import to Optimized or Import Management, the underlying physical tables are secured to external parties.

Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Hub Source System Reference** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Hub Source System Reference from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

How do I import incentive compensation participants?

You can use the import management functionality to create or update Incentive Compensation Participants. You can specify the exact parties you want to import as participants.

You can import Incentive Participants using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file for import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

You import Incentive Participants into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Incentive Participants import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Incentive Participants while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for Incentive Participants Object

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

This table lists the required attributes for Incentive Participants, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Participant	Updating an Existing Incentive Participant
PartyNumber	The party number of the participant. This is used to find the party that's to be imported as a participant.	The PartyNumber must match an existing party.	Required	Required
Business Unit	Unique numeric identifier for the Oracle Fusion Incentive Compensation business unit	The business unit should be valid.	Required	Not Required
Type	Indicates whether the participant is an Analyst or Participant. Analysts administer and manage the application. Participants are individuals who can receive compensation or sales credits inside the application.	The valid values are ANALYST or PARTICIPANT.	Required	Not required for update. This field can't be updated or changed after the participant is created.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Incentive Participants object. The page also lists attribute information like type, length, description, and so on.

> **Note:** You can't update participant detail records through import after the initial creation. You can update them by creating a new import, via the UI, or through a REST call.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Incentive Participants object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Incentive Participants information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Participants**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Incentive Participants** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Participants**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Incentive Compensation Performance Measure Data

You can use Import Management to create and update Incentive Compensation Performance Measure records.

To import incentive compensation performance measure records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import incentive compensation performance measure data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Incentive Compensation Performance Measure Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Incentive Compensation Performance Measure records, required attributes for updating Performance Measure records, prerequisite setup tasks for the attributes, and specific validations, if any, for Incentive Compensation Performance Measure import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Compensation Performance Measure record	Updating an Existing Incentive Compensation Performance Measure record
Name	The name of the performance measure.	None	Required	Not Required
PerformanceMeasureId	The unique identifier of the performance measure generated internally.	None	Not Required	Required
OrgId	The unique ID of the business unit to which the performance measure belongs.	None	Required	Required
StartDate	The date on which the performance measure becomes active.	Must be a valid date.	Requried	Not Required
EndDate	The date on which the performance measure becomes inactive.	Must be a valid date.	Required	Not Required
MeasureFormulaExpressionI	The name of the expression used in measure formula to calculate output of the performance measure.	None	Conditionally Required. Provide a value if MeasureFormulaExpressionI isn't entered.	Not Required
MeasureFormulaExpressionI	The unique identifier for the measure formula expression for this performance measure.	None	Conditionally Required. Provide a value if MeasureFormulaExpressionI isn't entered.	Not Required
Description	The description of the performance measure.	None	Required	Not Required
UnitOfMeasure	The standardized quantity used as a factor to express occurring quantities of the performance measure property.	Possible values include AMOUNT, PERCENT, QUANTITY, and SCORE. The default value is AMOUNT. A list of acceptable values is defined in the lookup CN_ MEASURE_UOM.	Not Required	Not Required
NumberOfDimensions	The number of dimensions of the score card used in the performance measure.	None	Not Required	Not Required
UseExternalFormulaFlag	Indicates whether the performance measure uses an external formula from an external package.	Possible values include FALSE and TRUE. The default value is FALSE. A list of acceptable values is defined in the lookup CN_YES_NO. Review and update the value for this attribute using the Setup and Maintenance, Manage	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Compensation Performance Measure record	Updating an Existing Incentive Compensation Performance Measure record
		Incentive Compensation Lookups task.		
ExternalFormulaName	The name of the external formula. This should be passed only if the UseExternalFormulaFlag is true.	None	Not Required	Not Required
IncludeInParticipantReportsI	Indicates whether to display the measure attainment in all views and reports.	Possible values include FALSE and TRUE.	Not Required	Not Required
RunningTotalFlag	Indicates whether to accumulate a calculation input, such as credit amount or credit quantity, over a period.	The default value is N so you need to explicitly pass Y if processing transaction is set as GROUP. Possible values include FALSE and TRUE. The default value is FALSE. This attribute is not applicable if ProcessTransactions is GROUP.	Not Required	Not Required
SplitOption	Specifies how to split the input number to a score card dimension.	Possible values include NONE to apply a single rate for the entire attainment, NON_PROPORTIONAL to apply multiple rates, which are fixed for an attainment within a tier, and PROPORTIONAL to apply multiple rates, which are proportional for an attainment within a tier. The default value is NONE. A list of acceptable values is defined in the lookup CN_ SPLIT_TYPE_OPTION.	Not Required	Not Required
ProcessTransactions	Indicates how the application processes transactions individually or in a group in a measure.	The possible values include GROUP for group transactions for the specified interval, for attainment calculation (when selecting GROUP, pass Accumulation Flag as Y), and INDIVIDUAL to evaluate each transaction independently, for attainment calculation. So each transaction is considered independently. This can't be updated once performance measure has been created. A list of acceptable values is defined in the lookup CN_ PROCESS_TXN.	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Compensation Performance Measure record	Updating an Existing Incentive Compensation Performance Measure record
PerformanceInterval	The interval value that the performance is measured for. Also, for running total, the accumulated value is reset based on this interval value. Interval would represent a unit of time like month, quarter, year.	The default value is '-1000'. To get this value, describe the resource and use the finder listed to get all possible values.	Not Required	Not Required
DisplayName	The name of the performance measure displayed on the user interface to represent the performance measure.	None	Not Required	Not Required

You can view the Performance Measure 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Incentive Compensation Performance Measure** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Performance Measure information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Incentive Compensation Performance Measure from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Incentive Compensation Rate Table Rates Data

You can use the import management functionality to update Incentive Compensation Rate Table Rates.

You can specify the exact parties you want to import as participants. You can also use import specifically for individualized rates. Individualized rates are used when each participant has different rates based on their achievement. Based on Plan Components and participant plan assignments individualization can be enabled.

Note: The individualization must be enabled prior to importing individualized rate table rates.

You can import Incentive Compensation Rate Table Rates using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file for import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

You import Incentive Compensation Rate Table Rates into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Incentive Participants import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.

- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Incentive Participants while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for Incentive Compensation Rate Table Rates Object

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

This table lists the required attributes for Incentive Compensation Rate Table Rates, prerequisite setup tasks and specific validations, if any.

> **Note:** To load rates at the plan component level, you must specify the measure name as ***planComponentName_IncFrm*** . The addition of ***_IncFrm*** is to differentiate the record loading between measure level and plan component level.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Incentive Compensation Rate Table Rate
BusinessUnit	The unique numeric identifier for the Oracle Fusion Incentive Compensation business unit.	None	Conditionally Required. Provide a value if OrgId isn't provided.
OrgId	The unique identifier of the organization.	The business unit should be valid.	Conditionally Required. Provide a value if BusinessUnit isn't provided.
ParticipantName	The name of the participant.	Must match unique participant in business unit. If it isn't unique then provide additional identifiers.	Conditionally Required. Provide a value if PartyNumber or ParticipantId isn't provided.
ParticipantId	The unique identifier of the participant.	None	Conditionally Required. Provide a value if ParticipantName isn't provided.
PartyNumber	The alternate unique identifier of the party.	The PartyNumber must match a participant for the given BU.	Conditionally Required. Provide a value if ParticipantName isn't provided.
CompPlanName	The name of the compensation plan.	Must be a valid compensation plan that is assigned to a specified participant.	Conditionally Required. Provide a value if CompPlanId isn't provided.
PlanAssignStartDate	The date when the plan assignment starts.	Must match start dates of an existing plan assignment for specified participant	Conditionally Required. Provide a value if you're setting the rates for a specific plan assignment. Also required if someone is assigned to the same plan at different times.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Incentive Compensation Rate Table Rate
PlanAssignEndDate	The date when the plan assignment ends.	Must match end dates of an existing plan assignment for specified participant	Conditionally Required. Provide a value if you're setting the rates for a specific plan assignment. Also required if someone is assigned to the same plan at different times.
PlanComponentName	The name of the plan component.	Must be a valid plan component with individualization set to All or Rates	Conditionally Required. Provide a value if PlanComponentId isn't provided.
RateTableName	The name of the rate table.	None	Required
RateTableStartDate	The date when the rate table starts.	None	Conditionally Required. Provide a value if multiple rate tables are assigned to the same plan component or performance measure.
RateTableEndDate	The date when the rate table ends.	None	Conditionally Required. Provide a value if multiple rate tables are assigned to the same plan component or performance measure.
RateValue	The value of the rate.	None	Required
Dim1Name	The dimension name.	None	Required
Dim1Tier	The dimension tier	None	Required

Go to Navigator > Tools > Import Management > Import Objects, to see all the attributes of the Incentive Compensation Rate Table Rates object. The page also lists attribute information like type, length, description, and so on.

Note:

- The import won't make changes to non-individualized rate table rates that are established when setting up plans.
- When configuring compensation plans, multiple rate tables can be added to a plan component or performance measure using effective dates. When multiple rate tables are associated in this way, values must be included for Rate Table Start and End Dates to specify which set of rates are to be adjusted.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Incentive Compensation Rate Table Rates object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Incentive Participants information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Incentive Participants.
2. On the Manage Imports page, click Create Import Activity.
3. In the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Incentive Compensation Rate Table Rates from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to Navigator > Tools > Import Management > Incentive Compensation Rate Table Rates.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Incentive Participant Goal Data

You can use Import Management to update Incentive Participant Goal records.

To import Incentive Participant Goal records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

Required Attributes and Validations for Incentive Participant Goal Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for updating Incentive Participant Goal records, prerequisite setup tasks for the attributes, and specific validations, if any, for Incentive Participant Goal import.

> **Note:** To load rates at the plan component level, you must specify the measure name as ***planComponentName_IncFrm*** . The addition of ***_IncFrm*** is to differentiate the record loading between measure level and plan component level.

Required Attributes and Validations for Incentive Participant Goal Object

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Existing Participant Goal Record
ParticipantName	This is the full name of the participant as stored in HZ_Parties.	Must match unique participant in business unit. If not unique additional identifiers can be provided.	Required. If duplicate participant names are found in the Business Unit, you will need to provide Party Number or Participant Identifier to uniquely identify the participant.
BusinessUnit	The name of the Oracle Incentive Compensation business unit.	None	Required unless OrgID is provided.
OrgId	The unique numeric identifier for the Oracle Fusion Incentive Compensation business unit.	A valid OrgId.	Required unless BusinessUnit is provided.
ParticipantId	The unique identifier of the participant.	None	Provide value to uniquely identify participant.
PartyNumber	The unique alternate identifier for the participant.	The PartyNumber must match a participant for the given BU.	Conditionally Required. Provide value to uniquely identify participant.
EmailAddress	The email address associated with the participant.	None	Conditionally Required. Provide value to uniquely identify participant.
HrPersonNumber	Typically the HR person number of the participant.	None	Conditionally Required. Provide value to uniquely identify participant.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Existing Participant Goal Record
MeasureName	The name of the performance measure for which goals are being assigned.	Must match a performance measure in BU and be assigned to specified participant.	Required unless FormulaID provided.
StartDate	Start date of the period for which the goals are being updated.	Must match start date of valid calendar period.	Required unless Period provided.
EndDate	End date of the period for which the goals are being updated.	Must match end date of valid calendar period.	Required unless Period provided.
PeriodName	The name of the calendar period for which goals are being updated.	Must be a valid period in calendar for specified business unit.	Required unless Start & End Date are provided.
Target	The period target the user wishes to set for the participant.	None	Required
UpdateAllOccurences	Indicates if specified goal value should be updated for all plans and plan components where the performance measure is used.	Valid values are Y, N, or left blank.	Optional. Defaulted to N if left blank.
EnforceAssignment	Indicates if goal updates should be restricted only to periods for which the participant was assigned to a specific compensation plan.	Valid values are Y, N, or left blank.	Optional. Defaulted to Y if left blank.
PlanName	Name of the specific compensation plan where the goal is being updated.	None	Optional. Required when UpdateAllOccurrences is set to N and unless plan ID is provided.
ComPlanId	Unique numeric identifier of the compensation plan where the goal is being updated.	None	Optional
CompPlanName	Name of the specific plan component where the goal is being updated.	None	Conditionally Required. Required when UpdateAllOccurrences is set to N or Plan Component ID isn't provided.
PlanComponentId	Unique numeric identifier of the plan component where the goal is being updated.	None	Optional
FormulaId	Unique numeric identifier of the performance measure for which goals are being updated.	Must match a performance measure in BU and be assigned to specified participant.	Optional

You can view the Incentive Participant Goal 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.

Note:

- Goals are set at the performance measure level for a specific period and participant. Sometimes, performance measures are reused in different plan components and plans. When setting goals you have the option to set different goals for a performance measure based on the associated plan or plan component. When using Update All Occurrences with the value Y, the goal will be loaded for all instances of where the performance measure is used for that participant. If it is set to N, you can specify the specific plan or plan component you wish to assign the goal to.
- The Enforce Assignment attribute can be set to Y or N. If left blank it will default to Y.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Participant Goal object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Incentive Participant Goal from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

How do I import incentive participant role assignments data?

You can use Import Management to create or update Incentive Participant Role Assignments.

To import Incentive Participant Role Assignments records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Participant Role Assignments data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Incentive Participant Role Assignments Object

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

This table lists the required attributes for Incentive Participant Role Assignments, prerequisite setup tasks and specific validations, if any

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Participant Role Assignment record	Updating an Incentive Participant Role Assignment record
ParticipantRoleId	The unique identifier of the participant role assignment.	None	Not Required	Required
ParticipantId	The unique identifier of a specific participant.	It must be a valid participant identifier.	Required	Conditionally Required. Provide a value if ParticipantRoleId isn't provided.
RoleId	The unique identifier of the role to which the participant is being assigned.	It must be a valid role identifier.	Required	Not Required
RoleStartDate	Effective start date of the role assignment.	None	Required	Conditionally Required. Provide a value if you want to change the start date.
RoleEndDate	The end date of the role assignment.	None	Optional. Null signifies open end date.	Optional. Null signifies open end date.
AccessType	This indicates whether the role is a Manager role or Member role.	None	Not Required	Not Required
PreserveAssignment	Preserve the changes done to the participant role assignment and prevent the automatic role assignment from updating or deleting this assignment.	None	Not Required. Default value is Yes.	Not Required

You can view the Incentive Participant Role Assignments object with 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Incentive Participant Role Assignments** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Participant Role Assignments information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Incentive Participant Role Assignments from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Incentive Rule Assignment Data

You can use the import functionality to create, update, or delete Incentive Rule Assignment records.

You can import Incentive Rule Assignment records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Incentive Rule Assignment data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Incentive Rule Assignment data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Incentive Rule Assignment import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Incentive Rule Assignments while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Incentive Rule Assignment attributes.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use the public unique identifier to identify records. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Incentive Rule Assignment Object

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

This table lists the required attributes for Incentive Rule Assignment records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Assignment record	Updating an Existing Incentive Rule Assignment record	Deleting an Existing Incentive Rule Assignment record
RuleNumber	PUID of the rule	The RuleNumber should exist.	A value is required if the Name isn't provided.	A value is required if the Name isn't provided.	A value is required if the Name isn't provided.
Name	Name of the rule	The Rule name should exist.	A value is required if the RuleNumber isn't provided.	A value is required if the RuleNumber isn't provided.	A value is required if the RuleNumber isn't provided.
AssignedObjectType	The type of the object assigned to the rule.	A value is required only when importing credit rules. Values can be INDIVIDUAL	Optional	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Assignment record	Updating an Existing Incentive Rule Assignment record	Deleting an Existing Incentive Rule Assignment record
		or PARTICIPANT_ON_ TXN.			
AssignedObjectId	The unique internal identifier of the object being assigned to the rule. • For credit, rollup and team rules, the object is participant. • For classification rules, the object is credit category. • For Participant assignment rules, the object is role. • For analyst hierarchy, the object is analyst.	This is validated against the corresponding object depending on the type of rule assignment being imported.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorkerN • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, or PartyNumber.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorkerN • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, or PartyNumber.	Provide one of the following : • AssignedObjectId • AssignedObjectName • EmailAddress • HrPrimaryWorkerNumber • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumber, HrPersonNumber, or PartyNumber.
AssignedObjectName	The name of the object being assigned to the rule. • For credit, rollup and team rules, the object is participant. • For classification rules, the object is credit category. • For Participant assignment rules, the object is role. • For analyst hierarchy, the object is analyst.	This validated against the corresponding object depending on the type of rule assignment being imported.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorkerN • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, or PartyNumber.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorkerN • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, or PartyNumber.	Provide one of the following : • AssignedObjectId • AssignedObjectName • EmailAddress • HrPrimaryWorkerNumber • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumber, HrPersonNumber, or PartyNumber.
EmailAddress	The Email address of the participant. This is applicable only when the object is a participant.	This is validated against the participant's email address.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorkerN • HrPersonNumber • PartyNumber	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorkerN • HrPersonNumber • PartyNumber	Provide one of the following : • AssignedObjectId • AssignedObjectName • EmailAddress • HrPrimaryWorkerNumber • HrPersonNumber • PartyNumber

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Assignment record	Updating an Existing Incentive Rule Assignment record	Deleting an Existing Incentive Rule Assignment record
			EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, and PartyNumber are only valid for participants.	EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, and PartyNumber are only valid for participants.	EmailAddress, HrPrimaryWorkerNumber, HrPersonNumber, and PartyNumber are only valid for participants.
HrPrimaryWorkerNumb	The Worker Number of the participant. This is applicable only when the object is a participant.	This is validated against the worker number of the participant.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorker • HrPersonNumber • PartyNumber EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, and PartyNumber are only valid for participants.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorker • HrPersonNumber • PartyNumber EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, and PartyNumber are only valid for participants.	Provide one of the following : • AssignedObjectId • AssignedObjectName • EmailAddress • HrPrimaryWorkerNumber • HrPersonNumber • PartyNumber EmailAddress, HrPrimaryWorkerNumber, HrPersonNumber, and PartyNumber are only valid for participants.
HrPersonNumber	The Person Number of the participant. This is applicable only when the object is a participant.	This is validated against the person number of the participant.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorker • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, or PartyNumber.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorker • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, or PartyNumber.	Provide one of the following : • AssignedObjectId • AssignedObjectName • EmailAddress • HrPrimaryWorkerNumber • HrPersonNumber • PartyNumber When the object is a participant, provide one among EmailAddress, HrPrimaryWorkerNumber, HrPersonNumber, or PartyNumber.
PartyNumber	The Party Number of the participant. This is applicable only when the object is a participant.	This is validated against the party number of the participant.	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorker • HrPersonNumber • PartyNumber	Provide one of the following : • AssignedObjectId • AssignedObjectNa • EmailAddress • HrPrimaryWorker • HrPersonNumber • PartyNumber	Provide one of the following : • AssignedObjectId • AssignedObjectName • EmailAddress • HrPrimaryWorkerNumber • HrPersonNumber • PartyNumber

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Assignment record	Updating an Existing Incentive Rule Assignment record	Deleting an Existing Incentive Rule Assignment record
			EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, and PartyNumber are only valid for participants.	EmailAddress, HrPrimaryWorkerNumb HrPersonNumber, and PartyNumber are only valid for participants.	EmailAddress, HrPrimaryWorkerNumber, HrPersonNumber, and PartyNumber are only valid for participants.
StartDate	The start date of the rule assignment, if applicable to the object.	None	Required	Required	Required
EndDate	The end date of the rule assignment, if applicable to the object.	None	Optional	Optional	Optional
SplitPct	The percentage split applicable to the participant assigned to the credit rule.	None	Required for credit rules	Optional	Optional
RevenueType	The revenue type applicable to the participant assigned to the credit or rollup rule.	The valid values are the lookup codes setup for lookup type CN_RS_ REVENUE_TYPE. This is applicable only to credit and rollup rules.	Required for credit and rollup rules.	Optional	Optional
RollupFlag	Option to determine if direct credit should be rolled up to every individual on parent rules. This is applicable only to credit rules.	The valid values are Y and N.	Required for credit rules	Optional	Optional
SummaryFlag	Option to determine if credits should be summarized. This is applicable to direct credit and rollup rules.	The valid values are Y and N.	Required for credit and rollup rules.	Optional	Optional
GroupMemberCreditFla	Option to determine if the member gets credit from any direct credit receivers in group or child groups. This is applicable to rollup rules.	The valid values are Y and N.	Required for rollup and hierarchy analyst rules	Optional	Optional
RuleAssignmentId	The unique internal identifier of the Rule Assignment record.	This validates against the Rule Assignment table when you update	Leave this blank.	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Assignment record	Updating an Existing Incentive Rule Assignment record	Deleting an Existing Incentive Rule Assignment record
		and delete incentive rule assignment records.			
ActionCode	Indicates explicitly the operation to be performed on a row: • INSERT to create a new record in the destination tables • UPDATE to update an existing record in the destination table • DELETE to delete the record.	The value can be blank, UPDATE, or DELETE.	Optional Leave this blank.	Required Enter the value as UPDATE.	Required Enter the value as DELETE.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Incentive Rule Assignment object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Incentive Rule Assignment object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Incentive Rule Assignment information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Rule Assignment**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Incentive Rule Assignment** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.

7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Rule Assignment**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Incentive Rule Attribute Values Data

You can use the import functionality to create or delete Incentive Rule Attribute Value records.

You can import Incentive Rule Attribute Value records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Incentive Rule Attribute Value data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Incentive Rule Attribute Value data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Incentive Rule Attribute Values import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Incentive Rule Attribute Values while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Incentive Rule Attribute Values attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Incentive Rule Attribute Value child objects. Note that you must have imported the CSV file for Incentive Rule Attribute Values object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for Incentive Rule Attribute Values Object

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

This table lists the required attributes for Incentive Rule Attribute Value records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Attribute Value record	Deleting an Existing Incentive Rule Attribute Value record
RuleNumber	PUID of the rule	The rule number should exist.	A value is required, if the Name isn't provided.	A value is required, if the Name isn't provided.
Name	Name of the rule	The rule name should exist.	A value is required if the RuleNumber isn't provided.	A value is required if the RuleNumber isn't provided.
AttributeName	Name of the qualifier	The attribute should have been setup as a qualifier in the Manage Custom Qualifier setup task.	Required	Required
OperatorName	Name of the operator	This is validated for operators that are enabled while setting up the attribute as a qualifier in the Manage Custom Qualifier setup task.	Required	Required if deleting a value. Not Required if deleting the qualifier.
LowValueChar	Qualifying attribute value	This is validated for the value set, if defined during setup in the Manage Incentive DFF setup task.	Required	Required if deleting a value. Not Required if deleting the qualifier.
HighValueChar	Indicates a higher range of qualifying attribute value if the operator is "Between"	This is validated for the value set, if defined during setup in the Manage Incentive DFF setup task.	Required, if the OperatorName is "Between"	Required, if the OperatorName is "Between" Required if the OperatorName is "Between" and you're deleting a value. Not required if you're deleting the qualifier.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule Attribute Value record	Deleting an Existing Incentive Rule Attribute Value record
RuleAttrValueId	Unique internal identifier of the rule attribute value	This is validated for the Rule Attribute Value table when deleting an incentive.	Leave this blank.	Optional
ActionCode	Indicates explicitly the operation to be performed on a row: • INSERT to create a new record in the destination tables • DELETE to delete the record.	The value can be either blank or DELETE.	Optional Leave this blank.	Required Enter the value as DELETE.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Incentive Rule Attribute Values object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Incentive Rule Attribute Values object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Incentive Rule Attribute Values information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Rule Attribute Values**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Incentive Rule Attribute Values** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Rule Attribute Values**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Incentive Rules Data

You can use the import functionality to create or update Incentive Rule records.

You can import Incentive Rule records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Incentive Rule data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Incentive Rule data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Incentive Rules import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Incentive Rules while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Incentive Rules attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Incentive Rule child objects. Note that you must have imported the CSV file for Incentive Rules object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use the public unique identifier to identify records. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Incentive Rules Object

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

This table lists the required attributes for Incentive Rule records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule record	Updating an Existing Incentive Rule record	Deleting an Existing Incentive Rule record
OrgName	The name of the business unit	To find the business unit, navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Function Area: Data Import and Export • Task: Manage Business Units In the Search results area, search for the name and select the name that's displayed. **Note:** Export the results to a spreadsheet. Use this information to identify and assign the business unit values to the data you're preparing.	Required	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule record	Updating an Existing Incentive Rule record	Deleting an Existing Incentive Rule record
UsageName	Indicates the incentive rule usage	The valid values are: • Crediting • Rollup Hierarchy • Classification • Participant Assignments • Team • Analyst Hierarchy	Required	Required	Required
RuleNumber	PUID of the rule	None	Optional	A value is required if the Name isn't provided.	A value is required if the Name isn't provided.
Name	The name of the rule	None	Required	A value is required if the RuleNumber isn't provided.	A value is required if the RuleNumber isn't provided.
Description	A brief description of the rule	None	Optional	Optional	Optional
StartDate	The start date of the rule	This must be in the open period.	Required	Optional	Optional
EndDate	The end date of the rule	This must be in the open period.	Required	Optional	Optional
EnabledFlag	Option to either enable or disable the rule	Y or N	Optional	Optional	Optional
Rank	The rank of the rule	None	Optional	Optional	Optional
NumWinners	The number of winners for this rule.	None	Optional	Optional	Optional
ParentRuleNumber	The rule number of the parent rule.	This must be an existing rule number or a rule number that's created in the same file.	Optional for the topmost rule in the hierarchy	Optional	Optional
ParentName	The rule name of the parent rule.	This must be an existing rule name or a rule name that's created in the same file.	Optional for the topmost rule, if the rule has no parent in the hierarchy	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Rule record	Updating an Existing Incentive Rule record	Deleting an Existing Incentive Rule record
ActionCode	Indicates explicitly the operation to be performed on a row: • INSERT to create a new record in the destination tables • UPDATE to update an existing record in the destination table • DELETE to delete the record.	The value can be blank or one of the following: • UPDATE • DELETE • DELETE HIERARCHY	Optional Leave this blank.	Optional Either leave this blank or enter UPDATE.	Required The value should be DELETE for a leaf node or DELETE HIERARCHY for the rule hierarchy

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Incentive Rules object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Incentive Rules object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Incentive Rules information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Rules**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Incentive Rules** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Incentive Rules**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

How do I import incentive transaction data?

You can use the import functionality to create or update Incentive Transaction records.

To import Incentive Transaction records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Incentive Transaction data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identifying an object record is through the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Incentive Transactions. You can determine the internal ID of a record by exporting Oracle Applications 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 Incentive Transaction object, the attributes are Transaction Number and Transaction Type.

Required Attributes and Validations for Incentive Transaction Object

To import data successfully into Oracle Applications 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 Incentive Transaction records, required attributes for updating Incentive Transaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for Incentive Transaction import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
Business Unit	Name of the business unit	Varchar2	240	To find the business unit: 1. Navigate to Setup and Maintenance. 2. Navigate to the Manage Business Units task. 3. In the Search results region, search for the name and select the name that's displayed. **Note:** You can export the results to a spreadsheet and use this information to identify and assign the Business Unit values to the data that you're preparing.	Required A value is required either for the Business Unit or the Business Unit Id.	Required A value is required either for the Business Unit or the Business Unit Id.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
Business Unit ID	Unique numeric identifier for the Oracle Fusion Incentive Compensation business unit.	Number	18	To find the business unit: 1. Navigate to Setup and Maintenance. 2. Navigate to the Manage Business Units task. 3. In the Search results region, click the View menu and add the Business Unit ID Column. **Note:** You can export the results to a spreadsheet and use this information to identify and assign the Business Unit ID values to the data that you're preparing.	Required A value is required either for the Business Unit or the Business Unit Id.	Required A value is required either for the Business Unit or the Business Unit Id.
Event Date	When the transaction triggers an incentive event associated with the row, for example, salespeople are compensated when an invoice is booked or an order is posted.	Date		The period must be open before you can collect the transaction into the application.	Required	Required
Transaction Amount	The transaction amount to be evaluated by the credit and earning processes.	Number		If providing a monetary amount, the amount should be in the currency of the source application.	Required	Required
Transaction Number	Unique transaction identifier used in the source application. The	Varchar2	30	Map an identifier that end users recognize and can search. For	Required	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
	combination of Source Transaction Number and Transaction Type values must be unique, and is validated during the Collect Transactions process.			example, map your source invoice number and invoice line number to this field.		
Transaction Type	Defines the type of the transaction. Predefined transaction types are CLAWBACK, CUSTOMER_ SATISFACTION, GRP, INVOICE, ITD, MANUAL, ORDER, PAYMENT, and RAM_ ADJUSTMENT.	Varchar2	30	The value must be a valid lookup code for lookup type CN_TP_ TRANSACTION_ TYPE. To define your own transaction types: 1. In Setup and Maintenance, go to the Manage Incentive Compensation Lookups task. 2. Search for CN_TP_ TRANSACTION_ TYPE. 3. Add your transaction types.	Required	Required

You can view the Incentive 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.

Note: Don't use the Transaction Sub-Type attribute. It's intended for internal use only.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Incentive Transaction** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Incentive Transaction from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Interaction Data

You can use the Import Management to create or update Interaction records.

To import Interaction records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Interaction data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Interaction object, this attribute is InteractionId:
- **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 Interaction object, the attribute is InteractionNumber.

Required Attributes and Validations for Interaction Object

To import data successfully into Oracle Applications 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 Interaction records, required attributes for updating Interaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for Interaction import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Interaction Record	Updating an Existing Interaction Record
InteractionId	The unique identifier of the interaction	Long	18	None	Not required	Required
InteractionNumber	The Public Unique Identifier of the interaction	Varchar	30	None	Not required	Not required
ChannelId	The unique identifier of the interaction channel	Long	18	The referenced record must exist.	Required	Not Required
StripeCd	The code indicating the stripe of the interaction. A list of valid values is defined in the lookup ORA_SVC_STRIPE_CD.	Varchar2	30	None	Not required	Required
StatusCd	The current status of the interaction. Interactions are either in the ORA_SVC_OPEN or ORA_SVC_CLOSED status.	Varchar	30	Default "ORA_SVC_OPEN"	Not required	Not required
DirectionCd	The code indicating whether the interaction is inbound or outbound. The default value is ORA_SVC_INBOUND, indicating inbound interactions. The value is ORA_SVC_OUTBOUND for outbound interactions.	Varchar	30	Default "ORA_SVC_INBOUND"	Not required	Not required
ParentInteractionId	The unique identifier of the parent interaction.	Long	18	The referenced record must exist, if included.	Not required	Not required
Description	The brief description of the interaction	Long	1000	None	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Interaction Record	Updating an Existing Interaction Record
AccountPartyId	The unique identifier of the account associated with the interaction	Long	18	The referenced record must exist, if included.	Not required	Not required
ContactPartyId	The unique identifier of the contact associated with the interaction	Long	18	The referenced record must exist, if included.	Not required	Not required
OwnerResourceId	The unique identifier of the owner of the interaction	Long	18	The referenced record must exist, if included.	Not required	Not required
MediaItemId	The unique identifier for the media item	Long	18	The referenced record must exist, if included.	Not required	Not required
StartTime	The time when the interaction becomes active	Date Time	None	None	Required	Not required
EndTime	The time when the interaction becomes inactive	Date Time	None	None	A value is required if the status is "ORA_SVC_CLOSED".	Not required
OriginalSystemRefe	The system reference used by the interaction	Varchar	255	None	Not required	Not required
SubStatusCd	The code indicating the sub-status of the interaction. A list of valid values is defined in the lookup ORA_SVC_IM_CLOS	Varchar	30	None	Not required	Not required
QueueId	The unique identifier of the interaction queue	Long	18	The referenced record must exist, if included.	Not required	Not required
AgentHTTPSession	The HTTP session Id of the agent	Varchar	100	None	Not required	Not required

You can view the Interaction 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Interaction** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Interaction from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Interaction Participant Data

You can use the Import Management to create or update Interaction Participant records.

To import Interaction Participant records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Interaction Participant data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all Interaction records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Interaction Participant object, this attribute is InteractionParticipantId

- 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 Interaction Participant object, the attribute is InteractionParticipantNumber.

Required Attributes and Validations for Interaction Participant Object

To import data successfully into Oracle Applications 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 Interaction Participant records, required attributes for updating Interaction Participant records, prerequisite setup tasks for the attributes, and specific validations, if any, for Interaction Participant import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Interaction Participant	Updating an Existing Interaction Participant Record
InteractionParticipa	The auto-generated number and primary key for this participant.	Long	18	None	Required	Required
ContactPartyNumbe	The party number of the contact if the participant was a contact.	String	30	The referenced record must exist, if included.	Required	Required
ResourcePartyNuml	The party number of the resource if the participant was a resource.	String	30	The referenced record must exist, if included.	Required	Required
InteractionId	The interaction id of the interaction to which the participant belongs.	Long	18	The referenced record must exist, if included.	Required	Not Required
InteractionNumber	The alternate key identifier for the interaction.	String	30	The referenced record must exist, if included.	Required	Not required
InteractionParticipa	The public unique identifier for the Interaction Participant.	String	30	None	Conditionally Required. Provide a value if InteractionId isn't provided. Participant ID has precedence.	Conditionally Required. Provide a value if InteractionId isn't provided. Participant ID has precedence.
ResourcePartyId	The party Id of the resource if the participant is a resource.	Long	18	The referenced record must exist, if included.	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Interaction Participant	Updating an Existing Interaction Participant Record
ContactPartyId	The PartyId of the contact if the participant is a contact.	Long	18	The referenced record must exist, if included.	Not required	Not required
ParticipantTypeCd	The type of participant.	String	30	The value is sourced from the lookup ORA_SVC_ PARTICIPANT_ TYPE_CD.	Not required	Not required
StartTime	The time when the participant joined the interaction.	Timestamp	None	None	Not required	Not required
EndTime	The time when the participant left the interaction.	Timestamp	None	None	Not required	Not required
DurationMinutes	The number of minutes the participant was on the conference. You can join, drop, and rejoin the conference.	Integer	9	None	Not required	Not required
ParticipantName	The name from the web conference. Does not necessarily tie to Fusion data.	String	128	None	Not Required	Not Required
Email	The email of the participant.	String	128	None	Not Required	Not Required
Phone	The phone number of the participant.	String	128	None	Not required	Not required
OriginalSystemRefe	Specifies the original system reference if record was imported.	String	225	None	Not required	Not required
Json	The JSON String.	ClobDomain	None	None	Not required	Not required

You can view the Interaction Participants 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.

> **Note:** Contact details, participant details, resource details, start time, and end time should be included to have a correct representation of the data.

Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Interaction Participant object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Interaction from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- Import Your Interaction Data

Import Your Interaction Reference Data

You can use Import Management to create Interaction Reference records.

To import Interaction Reference records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Interaction Reference data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new interaction references that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Interaction Reference Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Interaction Reference records, prerequisite setup tasks for the attributes, and specific validations, if any, for Interaction Reference import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Interaction Reference Record
ReferenceId	The unique identifier of the interaction reference.	No validation	Required
ObjectTypeCd	The code that indicates the object type present in the interaction reference.	If a service request interaction reference (ObjectId) is imported, then both the interaction and the service request records must exist before the import process. Valid values: SVC_SERVICE_REQUESTS, SVC_CHATS, MOO_OPTY, MKL_LM_LEADS, ZMM_ACTY_ACTIVITIES, SVC_WORK_ORDERS	Required
ObjectId	The unique identifier of the object associated with the interaction reference.	If a service request interaction reference (ObjectId) is imported, then both the interaction and the service request records must exist before the import process.	Either the ObjectId or the ObjectNumber is required. If both are present, then the ObjectId is preferred.
InteractionId	The unique identifier of the interaction.	An interaction record must exist before an interaction reference can be created/imported.	Either the InteractionId or the InteractionNumber is required. If both are present, then the InteractionId is preferred.
InteractionNumber	The public unique identifier of the interaction.	No validation	Either the InteractionId or the InteractionNumber is required. If both are present, then the InteractionId is preferred.
ObjectNumber	The public unique identifier of the object associated with the interaction reference.	If a service request interaction reference (ObjectId) is imported, then both the interaction and the service request records must exist before the import process.	Either the ObjectId or the ObjectNumber is required. If both are present, then the ObjectId is preferred.

Note: Update operation isn't supported for interaction reference records.

You can view the Interaction Reference 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.

2. Select the **Interaction Reference** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Interaction Reference**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Interaction Reference from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Interaction Reference**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Linked Party Data

You can use the import management to create or delete your Linked Party records.

To import Linked Party records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Linked Party data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration.
- **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.

Required Attributes and Validations for Linked Party Object

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

This table lists the required attributes for importing new Linked Party records, required attributes for deleting Linked Party records, prerequisite setup tasks for the attributes, and specific validations, if any, for Linked Party import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Linked Party Record	Deleting a Linked Party Record
LinkType	Indicates the type of Link Sets such as B2F_EQUIV.	None	Required	Required
RelatedPartyId	Fusion identifier of the Party which is related to the Link Set.	None	Conditionally Required. Either RelatedPartyId or RelatedPartyNumber must be provided. It should be party of the Customer party usage.	Not Required
RelatedPartyNumber	Public unique identifier of the Party which is related the the Link Set.	None	Conditionally Required. Either RelatedPartyId or RelatedPartyNumber must be provided. It should be party of the Customer party usage.	Required
PartyId	Fusion unique identifier of the party.	None	Conditionally Required. Either PartyId or PartyNumber must be provided. It should be a party of Sales such as Sales Prospect or Sales Account party usage.	Not Required
PartyNumber	The public unique identifier of the party.	None	Conditionally Required. Either PartyId or PartyNumber must be provided. It should be a party of Sales such as Sales Prospect or Sales Account party usage.	Required

You can view the Linked Party 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

You include the data that you want to import in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Linked Party** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Here is a recommended format for the CSV file:

LinkType	RelatedPartyNumber	PartyNumber	MainLink
B2F_EQUIV	FinancialParty-2	SalesParty-1	Y
B2F_EQUIV	FinancialParty-3	SalesParty-1	Y
B2F_EQUIV	SalesParty-1	FinancialParty-2	N
B2F_EQUIV	SalesParty-1	FinancialParty-3	N

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Linked Party** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Marketing Development Funds (MDF) Budget Data

You can use import management to create or update MDF Budget records.

To import MDF Budget records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Marketing Development Funds (MDF) Budget data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Budgets. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Budget object, the attributes are Budget Id and Owner Id.

- 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 MDF Budget object, the attributes are Owner Party Number and Company Party Number.

Required Attributes and Validations for MDF Budget Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Budget records, required attributes for updating MDF Budget records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Budget import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Budget Record	Updating an Existing MDF Budget Record
BudgetID	System generated unique identifier.	None	Not required	Required MDF budgets can be imported if they're in the following status: Draft, Active, or Inactive.
Start Date	The date after which the MDF budget can be activated any time.	If provided, this must be before the end date.	Required	Not required
Claim Deadline	Specifies the date by which claims should be submitted.	If provided, this must be equal to or greater than the end date.	Required	Not required
Request Deadline	Specifies the date by which fund requests should be submitted.	If provided, this must be between the start date and the end date.	Required	Not required
OwnerID	Identifies the owner of the MDF budget	None	Required	Required
Owner	Identifies the owner name of the MDF budget	None	Not required	Not required
Partner	Identifies the partner associated with the MDF budget	This is applicable only when the MDF budget type is "Discretionary- Single Partner".	Not required	Not required
OwnerPartyNumber	Identifies the owner's party number of the MDF budget	None	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Budget Record	Updating an Existing MDF Budget Record
PartnerCompanyNumber	The unique identifier of the partner associated with the MDF Budget	This is applicable only when the MDF budget type is "Discretionary- Single Partner".	Not required	Not required
Name	Specifies the name of the MDF budget.	None	Required	Not required
Currency	Specifies the transaction currency for MDF budget amounts	If providing a value, the value must exist in the CURRENCY_CODE column of the FND_CURRENCIES_VL table. You can view valid currency codes. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Currencies	Required	Not required
Initial Amount	Specifies the initial amount allocated to the MDF budget.	None	Required	Not required
Status	Current status for the Budget such as Draft , Active, or Inactive.	None	Required	Not required
Code	Unique identifier of an MDF budget.	None	Conditionally required, if you're providing a budget name for a new MDF budget.	Required if updating an existing budget and you aren't providing the unique Id of the MDF budget.

You can view the MDF Budget 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Budget** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Budget from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Budget Countries Data

You can use import management to create or update MDF Budget Countries records.

To import MDF Budget Countries records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Budget Countries data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Budget Countries. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Budget Countries object, the attribute is BudgetCountryID.

Required Attributes and Validations for MDF Budget Countries Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Budget Countries records, required attributes for updating MDF Budget Countries records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Budget Countries import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Budget Countries Record	Updating an Existing MDF Budget Countries Record
Budget CountryID	Specifies the budget country associated with the MDF budget	None	Required	A value is required, if changing from one country to another and the country code isn't provided.
Country Code	The code representing the country to which the country structure belongs.	None	Required	A value is required, if changing from one MDF budget country to another and the country ID isn't provided.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Budget Countries Record	Updating an Existing MDF Budget Countries Record
Budget Code	Unique identifier of an MDF budget	None	A value is required, if the unique ID of the budget isn't provided.	A value is required, if the unique ID of the budget isn't provided.

You can view the MDF Budget Countries 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Budget Countries** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Budget Countries from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Budget Team Data

You can use import management to create or update MDF Budget Team records.

To import MDF Budget Team records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Budget Team data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Budget Teams. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Budget Team object, the attributes are Budget Team Id and Budget Id.

- 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 MDF Budget Team object, the attribute is Resource Party Number.

Required Attributes and Validations for MDF Budget Team Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Budget Team records, required attributes for updating MDF Budget Team records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Budget Team import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Budget Team Record	Updating an Existing MDF Budget Team Record
Budget Team ID	This is a system generated unique identifier to identify the MDF budget team.	None	Required	Required
Resource Party Number	Identifies the budget team resource	None	Required	Required
Code	Unique identifier of an MDF budget	None	Required	Required
Budget ID	Specifies the MDF budget to which the budget team is associated	None	Not required	Required

You can view the MDF Budget Team 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Budget Team** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Budget Team from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Claim Data

You can use import management to create or update MDF Claim records.

To import MDF Claim records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Claim data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.

- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Claims. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Claim object, the attributes are Claim ID, Fund Request ID, and Owner ID.
- 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 MDF Claim object, the attribute is Owner Party Number.

Required Attributes and Validations for MDF Claim Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Claim records, required attributes for updating MDF Claim records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Claim import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Claim Record	Updating an Existing MDF Claim Record
Claim ID	This is a system generated unique identifier to identify the MDF Claim.	This is automatically derived from the import process when you import a new MDF claim.	Not required	A value is required if you're not providing an identifier for the MDF claim.
Fund Request Code	Unique fund request identifier	If provided, the Status Code of the FundRequestCode must be either Approved or Terminated.	A value is required when importing a new MDF claim and you're not providing the unique identifier of the request.	Not required

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Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Claim Record	Updating an Existing MDF Claim Record
Owner Party Number	A unique public identifier for the owner number	None	Conditionally required For a new MDF claim with any StatusCode, provide either the Owner ID or the, Owner Party Number.	Conditionally required When updating the owner of an MDF claim, provide either the Owner ID or the Owner Party Number.
Budget	Identifies the MDF budget associated with the claim	None	Not required	Not required
Fund Request ID	Identifies the fund request to which the MDF claim is associated	If provided, the Status Code of the fund request ID must be Approved or Terminated.	A value is required when importing a new MDF claim with any Status Code.	Not required
Name	Identifies the name of the MDF claim.	None	Required	Not required
Currency	The code that represents the currency for the MDF claim	None	Not required	Not required
Requested Amount	Specifies the amount for the MDF claim	None	Required	A value is required when updating the requested amount of an MDF claim with Status Code Draft or Returned.
MDF Request	Specifies the name for the fund request	None	A value is required when importing a new MDF claim.	Not required
Owner ID	Identifies the owner for the MDF claim	None	Conditionally required For a new MDF claim with any StatusCode, provide either the Owner ID or the Owner Party Number.	Conditionally required When updating the owner of an MDF claim, provide either the Owner ID or the Owner Party Number.
Owner	Identifies the owner of the MDF claim	None	Required	Not required
Status	Identifies the current status of the MDF claim such as Draft, Submitted, Pending Approval, Approved, or Rejected	This defaults to Draft when creating a new MDF claim.	Required	Not required
Conversion Rate to Budget	Specifies the conversion exchange rate. Stores the currency exchange rate	None	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Claim Record	Updating an Existing MDF Claim Record
	used for converting the user entered currency on the MDF claim to the CRM corporate currency			
Code	Unique MDF claim identifier.	None	Not required	A value is required if updating an existing MDF claim and you're not providing any other identifier for the MDF claim.

You can view the MDF Claim 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.

Note: When you create a record in the "Draft" status, it can't be moved directly to a terminal status such as "Approved", "Rejected", "Terminated", "Withdrawn" or "Returned". It should be converted from the "Draft" status to the OOTB defined status "Pending Approval" before it can be moved to a terminal status. You can create a record in any status except "Pending Approval".

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Claim** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Claim from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Claim Settlement Data

You can use import management to create or update MDF Claim Settlement records.

To import MDF Claim Settlement records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Claim Settlement data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Claim Settlements. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Claim Settlement object, the attributes are Claim Settlement ID and Claim ID.
- 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 MDF Claim Settlement object, the attribute is ClaimSettlementCode.

Required Attributes and Validations for MDF Claim Settlement Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Claim Settlement records, required attributes for updating MDF Claim Settlement records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Claim Settlement import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Claim Settlement Record	Updating an Existing MDF Claim Settlement Record
Claim Settlement ID	System generated unique claim settlement identifier	This is automatically derived from the import process when importing a new MDF claim settlement.	Not required	A value is required if you're not providing another identifier for the MDF claim settlement.
Type	Specifies the type of transaction for the MDF claim settlement	None	Required	Not required
Accounting Type	Specifies the type of MDF claim settlement - Credit or Debit. This is for reference only, as the MDF claim settlements doesn't have any effect on the available budget.	This is derived when the payment type is selected. Accounting Type = Credit if Payment Type is Payment.	Not required	Not required
Status	Specifies the current status of the MDF claim settlement	The default value is Incomplete.	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Claim Settlement Record	Updating an Existing MDF Claim Settlement Record
Currency	Transaction currency for the claim amount	If providing a value, the value must exist in the CURRENCY_CODE column of the FND_CURRENCIES_VL table. You can view the valid currency codes. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Currencies	A value is required when importing a new MDF claim with any Status Code.	A value is required when updating an MDF claim with Status Code Draft or Returned.
Amount	Specifies the amount being settled in the MDF claim settlement	This amount can't exceed the outstanding claim liability.	Required	A value is required if updating an existing MDF claim settlement with the Status Code Incomplete.
Claim ID	System generated unique identifier	If provided, the Status Code must be either Approved or Terminated.	A value is required when importing an MDF claim settlement with any Status Code.	Not required
Claim Code	Specifies a unique claim identifier	If provided, the Status Code of the Claim Code must be either Approved or Terminated.	A value is required when importing a new MDF claim settlement and you're not providing the unique identifier of the MDF claim.	Not required
Claim Settlement Code	Specifies the unique identifier for MDF claim settlements	None	Not required	A value is required if updating an existing MDF claim settlement and you're not providing any other identifier for the MDF claim settlement.

You can view the MDF Claim Settlement 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Claim Settlement** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Claim Settlement from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Claim Team Data

You can use import management to create or update MDF Claim Team records.

To import MDF Claim Team records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Claim Team data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Claim Teams. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Claim Team object, the attributes are Claim Resource ID, Resource ID, and Claim ID.
- 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 MDF Claim Team object, the attribute is Resource Party Number.

Required Attributes and Validations for MDF Claim Team Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Claim Team records, required attributes for updating MDF Claim Team records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Claim Team import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Claim Team Record	Updating an Existing MDF Claim Team Record
Resource Party Number	Identifies the resource for the MDF claim team	None	Not required	Not required
Claim Resource ID	System generated unique identifier	None	Not required	Optional or conditionally required
Resource ID	Specifies the resource added to the MDF claim team	None	Required Provide either the Resource ID or the Resource Party Number.	Not required
Code	Specifies a unique claim identifier	None	A value is required if you're not providing the unique ID of the request.	A value is required if you're not providing the unique ID of the request.
Claim ID	System generated unique identifier	None	Required	Not required

You can view the MDF Claim Team 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Claim Team** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Claim Team from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.

6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Request Data

You can use import management to create or update MDF Request records.

To import MDF Request records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Request data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Requests. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Request object, the attributes are Fund Request ID, Partner ID, and Owner ID.
- 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 MDF Request object, the attributes are Owner Party Number and Partner Company Number.

Required Attributes and Validations for MDF Request Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Request records, required attributes for updating MDF Request records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Request import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Request Record	Updating an Existing MDF Request Record
Fund Request ID	System generated unique fund request identifier	This is automatically derived from the import process when importing a new MDF request.	Not required	Required
Owner Party Number	A unique public identifier for the owner party number	None	A value is required for a new MDF request with any Status Code.	Required
Partner Company Number	A unique public identifier for the partner company number	None	A value is required for a new MDF request with any Status Code.	A value is required, when updating the partner of an MDF request in the Draft Status Code.
Name	Specifies the name of the fund request	None	A value is required when importing a new MDF request.	Not required
Currency	Specifies the transaction currency for MDF request amounts	If providing a value, the value must exist in the CURRENCY_CODE column of the FND_CURRENCIES_	A value is required when importing a new request with any Status Code.	A value is required when updating a request with Status Code Draft or Returned.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Request Record	Updating an Existing MDF Request Record
		VL table. You can view valid currency codes. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Currencies		
Requested Amount	Specifies the amount requested by the MDF request	None	Required	A value is required when updating the requested amount of a request with Status Code Draft or Returned.
Partner	Identifies the partner associated with the MDF request	None	Not required	Not required
Partner ID	Identifies the partner for the MDF request	None	A value is required for a new MDF request with any Status Code.	A value is required when you're updating the partner of an MDF request in the Draft Status Code.
Owner ID	Identifies the owner for the MDF request	None	A value is required for a new MDF request with any Status Code.	Required
Owner	Identifies the owner of the MDF request	None	Not required	Not required
Code	Unique MDF fund request identifier	None	Conditionally required if you're providing a request name for a new MDF budget.	A value is required if you're updating an existing MDF request and you're not providing the unique MDF request ID.

You can view the MDF Request 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.

> **Note:** When you create a record in the "Draft" status, it can't be moved directly to a terminal status such as "Approved", "Rejected", "Terminated", "Withdrawn" or "Returned". It should be converted from the "Draft" status to the OOTB defined status "Pending Approval" before it can be moved to a terminal status. You can create a record in any status except "Pending Approval".

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Request** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Request from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your MDF Request Team Data

You can use import management to create or update MDF Request Team records.

To import MDF Request Team records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your MDF Request Team data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating MDF Request Teams. You can determine the internal ID of a record by exporting Oracle Applications 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 MDF Request Team object, the attributes are MDF Request Resource ID, Resource ID, and Fund Request ID.
- 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 MDF Request Team object, the attribute is Resource Party Number.

Required Attributes and Validations for MDF Request Team Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new MDF Request

Team records, required attributes for updating MDF Request Team records, prerequisite setup tasks for the attributes, and specific validations, if any, for MDF Request Team import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a MDF Request Team Record	Updating an Existing MDF Request Team Record
MDF Request Resource ID	Specifies the unique fund request identifier in the MDF request team	None	Not required	Optional or Conditionally required
Resource ID	Specifies the resource added to the MDF request team	None	Required	Not required
Resource Party Number	The public unique identifier of the resource party	If providing a value and creating or updating a team resource, the value must exist.	Required	Not required
Code	Unique MDF fund request identifier	None	A value is required if you're not providing the unique ID of the MDF request.	A value is required if you're not providing the unique ID of the MDF request.
Fund Request ID	System generated unique fund request identifier	None	A value is required if you're adding a new member to the MDF request team	Not required

You can view the MDF Request Team 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **MDF Request Team** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select MDF Request Team from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Message Data

You can use the Import Management to create, update, or delete service request message records.

You can import message records using these steps:

1. Map your source message data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the message data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your message data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new messages or are updating messages that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Message Object

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

This table lists the required attributes for message records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Message record	Updating an Existing Message record
Message Content	Content of the message that's not an attachment.	None	Required	Required
Message Type Code	Indicates the type of message. If providing a value, it must be one of the following: • ORA_SVC_ CUSTOMER_ENTRY • ORA_SVC_RESPONSE • ORA_SVC_INTERNAL_ NOTE • ORA_SVC_SYSTEM_ NOTE	If providing a value, it must be one of the following: • ORA_SVC_ CUSTOMER_ENTRY • ORA_SVC_FORWARD • ORA_SVC_CHAT_ TRANSCRIPT • ORA_SVC_INTERNAL_ NOTE • ORA_SVC_RESPONSE • ORA_SVC_SYSTEM_ NOTE • ORA_SVC_SYSTEM_ RESPONSE	Required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Message record	Updating an Existing Message record
		• ORA_SVC_WRAP_UP		
Object ID	ID of the object (such as Note, Defect, Other SR) referencing the service request or referenced by the service request.	No validation	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE
Object Type Code	Lookup code that indicates the object type based on the OBJECT_ID table, such as SVC_SR_MESSAGES.	No validation	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE
Posted By ID	The Party Id of the person who posted the message. This person can be an internal resource or a customer contact.	No Validation	Not required	Conditionally required A value is required if you're updating an existing Posted By ID and you're not providing the party Id which is obtained from the table HZ_IMP_PARTIES_T.
Service Request ID	Specifies the service request to which the message belongs.	No validation	Not required	Conditionally required A value is required if you're updating an existing record and you're not providing the SRNumber.
SR Number	The unique number used to identify a service request. You can configure the service request number to a format that's best suitable to your organizational requirements.	No validation	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID.	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID..
Status Code	Indicates the status of the message, such as DRAFT, COMMITTED, and CORRECTED.	If providing a value, it must be one of the following: • ORA_SVC_DRAFT • ORA_SVC_ COMMITTED • ORA_SVC_ CORRECTED	Required	Required
Notification Processing Status Code	The notification processing status code.	No validation	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE
Notification Retry Count	The notification retry count.	No Validation	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE	Do not pass if the Message Type Code = ORA_SVC_ INTERNAL_NOTE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Message record	Updating an Existing Message record

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the message object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Message** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the message information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Message from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Nonduplicate Data

You can use the import functionality to create or update Nonduplicate records.

To import Nonduplicate records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Nonduplicate data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identifying an object record is through the internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Nonduplicates. You can determine the internal ID of a record by exporting Oracle Applications 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 Nonduplicate object, the attribute is NonduplicateId.

Required Attributes and Validations for Nonduplicate Object

To import data successfully into Oracle Applications 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 Nonduplicate records, required attributes for updating Nonduplicate records, prerequisite setup tasks for the attributes, and specific validations, if any, for Nonduplicate import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Nonduplicate Record	Updating an Existing Nonduplicate Record
NonDuplicateId	The unique identifier of the non-duplicate record.	Long	18	No validation	Conditionally Required	Required
NonDuplicatePartyI	The internal unique identifier of the party associated with the non-duplicate record.	Long	18	No validation	Conditionally Required	You can't update the Nonduplicate.
NonDuplicatePartyN	The alternate key identifier of the party associated with the non-duplicate record.	String		The NonDuplicatePartyN is evaluated when you don't provide a value for the NonDuplicatePartyI	Conditionally Required	You can't update the Nonduplicate
MasterPartyId	The unique identifier of the master party associated with the non-duplicate record.	Long	18	No validation	Conditionally Required	You can't update the Nonduplicate
MasterPartyNumbe	The alternate key identifier of the master party associated with the non-duplicate record.	String		The MasterPartyNumbe is evaluated when you don't provide a value for the MasterPartyId.	Conditionally Required	You can't update the Nonduplicate
StartDate	The date when the exclusion starts.	Date		No validation	Optional By default, the current date (sysdate) is considered.	You can't update the Nonduplicate

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Nonduplicate Record	Updating an Existing Nonduplicate Record
EndDate	The date when the exclusion ends.	Date		No validation	Optional By default, the date 31/12/4712 is considered.	Required

You can view the Nonduplicate 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Nonduplicate** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Nonduplicate from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

How do I import opportunity data?

You can use the Import Management to create, update, or delete opportunity records.

You can import opportunity records using these steps:

1. Map your source opportunity data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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

To better manage your opportunity information, the opportunity object has the following child objects:

- Opportunity Competitor
- Opportunity Contact
- Opportunity Lead
- Opportunity Partner
- Opportunity Revenue
- Opportunity Source
- Opportunity Team Member

If you want to import only a few records, then you can create a single CSV file for all opportunity attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the opportunity child objects. Note that you must have imported the CSV file for opportunity object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunities or are updating opportunities that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Object

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

This table lists the required attributes for opportunity records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Record	Updating an Existing Opportunity Record	Deleting an Existing Opportunity Record
Business Unit ID	The business unit that owns the opportunity transaction. If a value isn't provided, then the business unit ID is set to a default value based on the signed in user details.	Not applicable	Required	Do not provide	Do not provide
Name	Opportunity Name - The name that identifies the opportunity.	Not applicable.	Required	Required	The attribute is neither required nor conditionally required.
OptyId	Opportunity ID - The unique ID	You can obtain the OptyID for an	Conditionally Required	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Record	Updating an Existing Opportunity Record	Deleting an Existing Opportunity Record
	for the existing opportunity record in the destination table.	existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Either OptyId or OptyNumber is required.		
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Do not provide.	Conditionally Required

Note:
- The profile options MOO_CLOSE_COMP_REQD and MOO_CLOSE_WINLOSS_REQD can be configured to enforce the Competitor and `Winloss` Reason Code to be required if the Status is closed.
- You can only import into the `Effective Date` field and not in the `Actual Close Date` field.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

How do I import opportunity competitor data?

You can use the Import Management to create, update, or delete opportunity competitor records.

You can import opportunity competitor records using these steps:

1. Map your source opportunity competitor data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity competitor data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity competitor data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity competitors or are updating opportunity competitors that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Competitor Object

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

This table lists the required attributes for opportunity competitor records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Competitor Record	Updating an Existing Opportunity Competitor Record	Deleting an Existing Opportunity Competitor Record
OptyCompetitorId	The unique identifier for Competitors of the Opportunity, that's generated by the application.	Not Applicable	Do not provide	Conditionally Required	Conditionally Required
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Competitor Record	Updating an Existing Opportunity Competitor Record	Deleting an Existing Opportunity Competitor Record
		• Task: Schedule Export Processes			
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
CmptPartyId	The party identifier with competitor party usage.	Not applicable	Required	Do not provide.	Do not provide

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity competitor object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Competitor** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity competitor information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Competitor from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I update existing setup data?

Import Your Opportunity Contact Data

You can use the Import Management to create, update, or delete opportunity contact records.

You can import opportunity contact records using these steps:

1. Map your source opportunity contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity contact data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity contacts or are updating opportunity contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Contact Object

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

This table lists the required attributes for opportunity contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Contact Record	Updating an Existing Opportunity Contact Record	Deleting an Existing Opportunity Contact Record
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the **`OptyID`** for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required. You can use **`TargetPartyID`** to associate the Account if you're assigning Account Contact as the Primary Contact of Opportunity.	Conditionally Required	Conditionally Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Contact Record	Updating an Existing Opportunity Contact Record	Deleting an Existing Opportunity Contact Record
			Either OptyId or OptyNumber is required.		
PERPartyId	The party identifier of the contact associated with the opportunity.	Not applicable	Required	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects** page, to see all the attributes of the opportunity contact object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity contact information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I update existing setup data?

Import Your Opportunity Deal Data

You can use Import Management to create update, or delete Opportunity Deal records.

To import Opportunity Deal records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Opportunity Deal data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID

attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Opportunity Deals or are updating Opportunity Deals that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Deal Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Opportunity Deal records, required attributes for updating Opportunity Deal records, prerequisite setup tasks for the attributes, and specific validations, if any, for Opportunity Deal import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Opportunity Deal Record	Updating an Existing Opportunity Deal Record
DealId	The unique identifier for the existing deal record in the destination table	You can obtain the Deal Number for an existing deal registration from the Deal Registration work area.	Conditionally required A value is required either for the DealId or the DealNumber.	Conditionally required
OptyDealId	The unique identifier of the opportunity deal	No validation	Conditionally required	Conditionally required
DealNumber	The unique identifier value of the deal	No validation	Conditionally required A value is required either for the DealId or the DealNumber.	Conditionally required
OptyId	The unique identifier for the existing opportunity record in the destination table	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally required A value is required either for the OptyId or the OptyNumber.	Conditionally required
OptyNumber	The public unique identifier value of the opportunity	No validation	Conditionally required A value is required either for the OptyId or the OptyNumber.	Conditionally required

You can view the Opportunity Deal 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Deal** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Deal from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Opportunity Lead Data

You can use the Import Management to create, update, or delete opportunity lead records.

You can import opportunity lead records using these steps:

1. Map your source opportunity lead data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity lead data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity lead data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity leads or are updating opportunity leads that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Lead Object

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

This table lists the required attributes for opportunity lead records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Lead Record	Updating an Existing Opportunity Lead Record	Deleting an Existing Opportunity Lead Record
`OptyLeadId`	The unique identifier of the opportunity lead.	Not applicable	Conditionally Required	Conditionally Required	Conditionally Required
`OptyId`	The unique ID for the existing opportunity record in the destination table.	You can obtain the **`OptyID`** for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
`OptyNumber`	The opportunity's public unique identifier value.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
`LeadNumber`	The lead's unique identifier value.	You can obtain the Lead Number for an existing lead registration using the Lead registration work area.	Required	The attribute is neither required nor conditionally required.	Conditionally required. To identify the existing lead relationship record,provide either the record ID (**`OptyLeadId`**), or provide the lead number (**`LeadNumber`**) and the opportunity's record ID (**`OptyId`**), or provide the lead number (**`LeadNumber`**) and the opportunity number (**`OptyNumber`**).

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity lead object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Lead** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity lead information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Lead from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

Import Your Opportunity Partner Data

You can use the Import Management to create, update, or delete opportunity partner records.

You can import opportunity partner records using these steps:

1. Map your source opportunity partner data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity partner data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity partner data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity partners or are updating opportunity partners that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Partner Object

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

This table lists the required attributes for opportunity partner records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Partner Record	Updating an Existing Opportunity Partner Record	Deleting an Existing Opportunity Partner Record
PartOrgPartyId	The party identifier of a partner.	Not applicable	Required	Required	Required
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity partner object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Partner** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity partner information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Partner from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I update existing setup data?

Import Opportunity Revenue Data

Import Your Opportunity Revenue Data

You can use the Import Management to create, update, or delete opportunity revenue records.

You can import opportunity revenue records using these steps:

1. Map your source opportunity revenue data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity revenue data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity revenue data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.

- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity revenues or are updating opportunity revenues that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Revenue Object

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

This table lists the required attributes for opportunity revenue records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Revenue Record	Updating an Existing Opportunity Revenue Record	Deleting an Existing Opportunity Revenue Record
RevnId	The unique identifier of the summary revenue for this Opportunity.	Not applicable	Not Required	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Revenue Record	Updating an Existing Opportunity Revenue Record	Deleting an Existing Opportunity Revenue Record
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
RevnNumber	Revenue Number - The opportunity revenue's unique identifier value.	Identify the Revenue Number for an existing opportunity revenue using the Revenue Management work area and by exporting the Revenue object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Not Required	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.
BUOrgId	The unique identifier of the business unit.	Not applicable	Required	Do not provide	Do not provide
RevnAmountCurcyCode	Currency - The code that represents the currency of the opportunity amount.	You can view valid currency codes by navigating to the following in the Setup and Maintenance work area: • Offering: Sales	Required	The attribute is neither required nor conditionally required.	The attribute is neither required nor conditionally required.

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Revenue Record	Updating an Existing Opportunity Revenue Record	Deleting an Existing Opportunity Revenue Record
		• Functional Area: Sales Foundation • Task: Manage Currencies			

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity revenue object. The page also lists attribute information like type, length, description, and so on.

Note: To update multiple revenue lines belonging to the same opportunity, you must increase the import commit size in the profile option ZCA_STANDARD_IMPORT_COMMIT_SIZE. It is recommended that you set the value to an optimum level based on your requirements.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Revenue** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Note: When you add a product or a product group, a separate line will be added in the opportunity revenue. However, you can't add both the product and the product group simultaneously. You need to use separate requests to add multiple products and product groups.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity revenue information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Revenue from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I update existing setup data?

Example of Importing Split Revenue Lines

You can use import management to create, update, and delete split revenue lines. Split revenue lines is a type of revenue which is also known as Sales Credit.

There are two types of split revenue known as Revenue Sales Credit and Overlay Sales Credit. For more information on Split Revenue Lines or Sales Credit see Best Practices for Sales Credit in the Related Topics section.

How You Map Your Source Data to Target Object Attributes

To import your split revenue lines data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity revenues or are updating opportunity revenues that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Importing Opportunity Split Revenue Lines Data

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

This table lists the required attributes for split revenue lines records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Split Revenue Line Record	Updating a Split Revenue Line Record	Deleting a Split Revenue Line Record
RevnId	The unique identifier of the summary revenue for this Opportunity.	Not applicable	Not Required	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Not Required	Not Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Not Required	Not Required
RevnNumber	Revenue Number - The opportunity	Identify the Revenue Number for an existing opportunity	Not Required	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Split Revenue Line Record	Updating a Split Revenue Line Record	Deleting a Split Revenue Line Record
	revenue's unique identifier value.	revenue using the Revenue Management work area and by exporting the Revenue object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes		Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.	Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.
SplitParentRevnId	The unique identifier of the split parent revenue.	Must be a valid Revenue ID	Required	Not Required	Not Required
ResourcePartyId	The identifier of the resource associated with the child split revenue.	It must be a valid Resource ID	Required	Not Required	Not Required
SalesCreditTypeCode	The code indicating the type of the sales credit, such as quota or non-quota. A list of valid values is defined in the lookup MOO_SALES_CREDIT_	None	Required	Not Required	Not Required
SplitTypeCode	The code indicating the Split type of the Revenue, such as ParentSplit or ChildSplit.	Must be a valid value as per Lookup MOO_ REVN_SPLIT_TYPE.	Required	Not Required	Not Required
ProductGroupId	The unique identifier of the product group.	None	Required	Not Required	Not Required

Note: Note the following:

- You can't create revenue lines and split revenue line in a single import. You must create a revenue line first and then a split revenue line. You can also create split revenue lines on an existing revenue line.
- Ensure that the commit size is set to a higher value before running imports for a split revenue line. It should be more than the maximum number of split children that are present for any given revenue. Also, you must enable the profile ZCA_STANADR_IMPORT_COMMIT_SIZE.
- To delete a revenue sales credit, you need to update the split percentage of the record to be deleted to 0% and then delete in a separate request. You can't update and delete using a single .csv file.
- To delete an overlay sales credit, you must provide value for either RevnNumber or RevnId for identifying a record of Opportunity Revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.
- While passing split lines in .csv, parent split line always has to be added after all child splits to satisfy 100% split percent validation.
- You should provide value for SplitPercent while importing, otherwise an amount with 0 will be created.

Sample Input CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file. Here is a sample .csv file to import split revenue line data:

OptyNumber	ProdGroupId	ResourcePartyId	SalesCreditTypeCode	SplitPercent	SplitParentRevnId
CDRM_121495	100000011628005	100010032635399	QUOTA	50	300100541953926
CDRM_121495	100000011628005	100010025532672	QUOTA	50	300100541953926

Create the Import Activity

After you have the CSV file ready, create an import activity. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Revenue from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- Best Practices for Sales Credits

Example of Importing Recurring Revenue Data

You can use import management to create, update, and delete recurring revenue data. Recurring schedules in opportunities enables you to enter and track opportunity products or product groups that are part of a subscription business model.

For more information see Overview of Recurring Opportunity Products in the Related Topics section.

How You Map Your Source Data to Target Object Attributes

To import your recurring revenue data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity revenues or are updating opportunity revenues that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Importing Recurring Revenue Data

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

This table lists the required attributes for recurring revenue data records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Recurring Revenue Record	Updating a Recurring Revenue Record	Deleting a Recurring Revenue Record
RevnId	The unique identifier of the summary revenue for this Opportunity.	Not applicable	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing either of these results in error.
OptyId	The unique identifier for the existing opportunity record in the destination table.	You can obtain the OptyId for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Not Required	Not Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Not Required	Not Required
RevnNumber	The alternate unique identifier of the revenue.	Identify the Revenue Number for an existing opportunity revenue using the Revenue Management work area and by exporting the Revenue object by navigating to the following in the Setup and	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing	Conditionally Required Either RevnNumber or RevnId must be passed for identifying a record of Opportunity revenue. If both are passed then only the RevnId field is checked. Not passing

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Recurring Revenue Record	Updating a Recurring Revenue Record	Deleting a Recurring Revenue Record
		Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	either of these results in error.	either of these results in error.	either of these results in error.
RecurFrequencyCode	The code that indicates the frequency of recurrence for the child revenue.	A list of valid values is defined in the lookup MOO_RECURRING_FREQUENCY.	Required	Not Required	Not Required
RecurNumberPeriods	The number of times the child revenue should recur.	None	Conditionally Required Either RecurNumberPeriods or RecurEndDate is required	Not Required	Not Required
RecurEndDate	The date when the child revenue recurrence ends.	None	Conditionally Required Either RecurNumberPeriods or RecurEndDate is required	Not Required	Not Required
RecurStartDate	The date when the recurrence starts.	None	Conditionally Required Either RecurStartDate or EffectiveDate is required	Not Required	Not Required
EffectiveDate	The date when the child revenue closes.	None	Conditionally Required Either RecurStartDate or EffectiveDate is required	Not Required	Not Required
ScheduleAction	The transient attribute. Need to pass a value to indicate the action to be taken on recurring schedule such as ADD and DELETE.	None	Required	Not Required	Required

Sample Input CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file. Here is a sample .csv file to import recurring revenue data:

OptyNumber	RevnId	RecurFrequencyCode	RecurNumberPeriods	EffectiveDate	ScheduleAction
CDRM_123532	300100546223965	MONTHLY	3	12/25/2021	ADD

Create the Import Activity

After you have the CSV file ready, create an import activity. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Revenue from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- Overview of Recurring Opportunity Products

Import Your Opportunity Source Data

You can use the Import Management to create, update, or delete opportunity source records.

You can import opportunity source records using these steps:

1. Map your source opportunity source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity source data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity source data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity sources or are updating opportunity sources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations Opportunity Source Object

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

This table lists the required attributes for opportunity source records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Source Record	Updating an Existing Opportunity Source Record	Deleting an Existing Opportunity Source Record
OptySrcId	The unique ID for the existing campaign source code relationship record in the destination table.	Identify the ID for an existing campaign source code relationship by exporting the Opportunity Source object by navigating to the following in the Setup and	The attribute is neither required nor conditionally required.	The attribute is neither required nor conditionally required.	Conditionally required.

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Source Record	Updating an Existing Opportunity Source Record	Deleting an Existing Opportunity Source Record
		Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes			
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity source object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Source** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity source information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Source from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

Import Your Opportunity Team Member Data

You can use the Import Management to create, update, or delete opportunity team member records.

You can import opportunity team member records using these steps:

1. Map your source opportunity team member data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity team member data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your opportunity team member data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.

- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity team members or are updating opportunity team members that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Team Member Object

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

This table lists the required attributes for opportunity team member records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Team Member Record	Updating an Existing Opportunity Team Member Record	Deleting an Existing Opportunity Team Member Record
OptyResourceId	The unique identifier for the opportunity resource.	Not applicable.	Required	Conditionally Required	Conditionally Required
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Team Member Record	Updating an Existing Opportunity Team Member Record	Deleting an Existing Opportunity Team Member Record
		• Functional Area: Data Import and Export • Task: Schedule Export Processes			
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
ResourceId	The unique party ID for the existing Account Team Member record.	Identify the resource ID value by exporting the resource object by navigating to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Schedule Export Processes	The attribute is neither required nor conditionally required.	To identify the party, provide either the record ID (`PartnerAccountId`) or both the source system code and reference values that you provided when importing the party in a prior import batch (`PartyOrigSystem` and `PartyOrigSystemRef`	The attribute is neither required nor conditionally required.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the opportunity team member object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Opportunity Team Member** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the opportunity team member information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Opportunity Team Member from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I update existing setup data?

How do I import organization data?

You can use Import Management to create or update Organization records.

To import Organization records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Organization data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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.
- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new organizations or are updating organizations that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Organization Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Organization records, required attributes for updating Organization records, prerequisite setup tasks for the attributes, and specific validations, if any, for Organization import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
SourceSystem	The original source system name	Know the source system. To view source systems, use the Manage Trading Community Source System task.	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenc • PartyNumber	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber
SourceSystemReferenceValu	The identifier in the original source system	Know the source system reference value. To view the source systems reference, use the Manage Trading Community Source System task.	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenc	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
			• PartyNumber	• PartyNumber
PartyNumber	The public unique identifier of the party.	Know party number. To obtain a list of all party IDs and party numbers, export the Party object.	Conditionally Required	Conditionally Required
OrganizationName	The name of the party of the Organization party type.	The organization names are listed in the Resource Directory.	Required	Conditionally Required
PartyUsageCode	Specifies the party usage code to which the organization is associated	This should be an active value in the HZ_PARTY_USAGES_B table.	Required	Not required
CleanlinessScore	The overall score for the account or contact record for the category **Cleanliness**	No validation	Optional	Optional
CompletenessScore	The overall score for the account or contact record for the category **Completeness**	No validation	Optional	Optional
DataConfidenceScore	The overall data confidence score that indicates the level of data quality for a record	No validation	Optional	Optional
DuplicateIndicator	Signifies the duplicate status of the record that's determined as follows: • A null value indicates that the record isn't a duplicate or hasn't been evaluated. • The record can also have one of 2 other values - DUPE (record is a duplicate) or LINK (record is linked to another record).	No validation	Optional	Optional
DuplicateScore	The overall score for the account or contact record for the category **Duplicate**	No validation	Optional	Optional
EnquiryDuns	A unique identifier used to query the Dun and Bradstreet data. If the	No validation	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
	location is a branch, in some countries the "DUNS" number of the headquarters is used to run the query. Otherwise, the "DUNS" number is considered.			
EnrichmentScore	The overall score for the account or contact record for the category **Enrichment**	No validation	Optional	Optional
LastScoreUpdateDate	The date and time at which this record was updated by the source system in the last update source system column	No validation	Optional	Optional
RecencyScore	The overall score for the account or contact record for the category **Recency**	No validation	Optional	Optional
ThirdPartyFlag	This option tracks if a party has a direct relationship with the organization using Oracle receivables or through a third party supplier. The value Y denotes third party relationship, while the value N denotes direct relationship. If Oracle Service is installed, the Third Party field in the Customers window is mandatory.	No validation	Optional	Optional
ValidatedFlag	Indicates if the party was validated. The value Y denotes a validated party, while the value N denotes a party that's not validated.	No validation	Optional	Optional
ValidityScore	The overall score for the account or contact record for the category **Validity**	No validation	Optional	Optional

You can view the Organization 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

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Organization** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Organization from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Overflow Queue Resource Data

You can use Import Management to create or update Overflow Queue Resource records.

To import Overflow Queue Resource records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Overflow Queue Resource data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new overflow queue resources or are updating overflow queue resources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Overflow Queue Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Overflow Queue Resource records, required attributes for updating Overflow Queue Resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for Overflow Queue Resource import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Overflow Queue Resource Record	Updating an Existing Overflow Queue Resource Record
QueueResourceId	The unique identifier of the overflow queue resource.	No Validation	Not Required	Not Required
ObjectId	The unique identifier of the overflow queue added as a queue resource.	The queue should exist.	Conditionally Required Either the ObjectId or the OverflowQueueNumber is required.	Not Required
OverflowQueueNumber	The public unique identifier of the overflow queue associated with the queue.	The queue should exist.	Conditionally Required Either the ObjectId or the OverflowQueueNumber is required.	Not Required
QueueId	The unique identifier of the queue.	The queue should exist.	Conditionally Required Either the ObjectId or the OverflowQueueNumber is required.	Not Required
QueueNumber	The public unique identifier of the queue to which the resource is associated.	The queue should exist.	Conditionally Required Either the ObjectId or the OverflowQueueNumber is required.	Not Required
EnabledFlag	Contains the values, True or False. If True, then the queue resource member is enabled. If False, then the queue resource member isn't enabled. The default value is True.	No Validation	Not Required	Not Required
Priority	The priority of the overflow queue resource.	No Validation	Not Required	Not Required

You can view the Overflow Queue Resource 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.

2. Select the **Overflow Queue Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Overflow Queue Resource**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Overflow Queue Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Overflow Queue Resource**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Partner Data

You can use the Import Management to create or update Partner records.

To import Partner records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Partner data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Partner object, this attribute is PartyId:
- **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 Partner object, the attribute is CompanyNumber.

Required Attributes and Validations for Partner Object

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

To update the status of a partner, create an import by providing values for the attributes PartyId, Status,and CompanyNumber in the CSV file.

This table lists the required attributes for importing new Partner records, required attributes for updating Partner records, prerequisite setup tasks for the attributes, and specific validations, if any, for Partner import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Record	Updating an Existing Partner Record
OrganizationName	The name of the organization	Text	360	The value is required if creating a new organization.	Required	Not required
AddressLineOne	The first line of the postal address	Text	240	No validation	Required	Not required
Country	The country code of the postal address	Text	2	If providing a value, the value must exist in the FND_ TERRITORIES_ B table. You can view valid country codes. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Territories	Required	Not Required
PartyId	The unique ID for the existing partner organization's party record in the destination table	Number	18	Identify the PARTY_ID for an existing partner party by exporting the Partner Profile object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes	Not required	A value is required either for PartyId or CompanyNumber.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Record	Updating an Existing Partner Record
CompanyNumber	The company number of the partner.	Text	30	If providing a value and importing a new party in the same import batch as this certification, the value must be unique in the ZPM_IMP_ PARTNER table. If providing a value for an existing party, the value must exist in the ZPM_PARTNER_ PROFILES table, column COMPANY_ NUMBER.	Not required	A value is required either for CompanyNumber or PartyId.

You can view the Partner 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Partner** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

You can specify the required role while creating the first partner contact for a partner. Also, once the first partner contact has been created, you can update the role for this partner contact.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner** from the **Object** drop-down list.

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

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Partner Account Resource Data

You can use the import functionality to create or update Partner Account Resource records.

You can import Partner Account Resource records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Partner Account Resource data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Partner Account Resource data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Partner Account Resource import object.

- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Partner Account Resources while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Partner Account Resource attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Partner Account Resource child objects. Note that you must have imported the CSV file for Partner Account Resource object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Partner Account Resource or are updating Partner Account Resource that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Partner Account Resource Object

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

This table lists the required attributes for Partner Account Resource records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Partner Account Resource record	Updating an Existing Partner Account Resource record
AccessLevelCode	The attribute that determines the access type (namely, Edit, Full Access, View Only) granted to the resource.	A value is required when adding a new resource to the team.	Not Required If no value is passed, then the default value, Full Access is used.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Partner Account Resource record	Updating an Existing Partner Account Resource record
AssignmentTypeCode	The attribute that determines how the resource was assigned to the partner account team.	If no value is passed, then the default value is used.	Not Required.	Not required
PartnerAccountResourceId	The primary key of the resource on the partner account team.	This unique identifier is auto-generated if no value is passed.	Not required	Required
ResourceId	The unique identifier of the resource.	The value should be a PartyID of a valid resource.	Either the ResourcePartyNumber or the ResourceId is required.	Not required
ResourcePartyNumber	The party number of the resource.	The value should be a PartyNumber of a valid resource.	Either the ResourcePartyNumber or the ResourceId is required.	Not required
PartnerCompanyNumber	The company number of the partner.	The value should be a company number of a valid partner company.	Required	Not required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Partner Account Resource object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Partner Account Resource object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Partner Account Resource information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Account Resource** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.

5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

> **Note:** To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Partner Address Data

You can use the import functionality to create or update Partner Address records.

You can import Partner Address records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Partner Address data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Partner Address data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Partner Address import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.

- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Partner Address while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Partner Address attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Partner Address child objects. Note that you must have imported the CSV file for Partner Address object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Partner Address or are updating Partner Address that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Partner Address Object

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

This table lists the required attributes for Partner Address records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Partner Address record	Updating an Existing Partner Address record
LocationId	The internal ID for the location.	No validation	Not Required	Not Required
PrimaryFlag	The attribute indicates the primary address of the partner.	No validation	Required. If not passed, the default value, 'N' is used.	Not Required
Country	The country of the specified partner address.	No validation	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Partner Address record	Updating an Existing Partner Address record
AddressId	The primary key for the Partner Address record.	No validation	Auto-generated	Required
PartyId	The party ID of the partner company.	Either the PartyId or the CompanyNumber is required.	Required	Not Required
CompanyNumber	The company number of the partner company.	Either the PartyId or the CompanyNumber is required.	Required	Not Required
AddressNumber	The PUID of the address object.	No validation	This is auto-generated or can be passed while creating a record.	Either the AddressNumber or the AddressId is required.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Partner Address object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Partner Address object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Partner Address information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Address** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Note: To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Partner Certification Data

You can use the import functionality to create Partner Certification records.

You can import Partner Certification records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Partner Certification data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Partner Certification data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Partner Certification import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Partner Certification records while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Partner Certification attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Partner Certification child objects. Note that you must have imported the CSV file for Partner Certification object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing a new Partner Certification record that has a source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Partner Certification Object

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

This table lists the required attributes for Partner Certification records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Partner Certification record
CertificationCode	The code for the certification.	No Validation	Required
PartnerMultivalLovId	The primary key for the partner certification record.	No Validation	Auto-generated
PartnerCompanyNumber	The company number of the partner.	No Validation	Required

Note: The Update operation isn't supported for Partner Certification records.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Partner Certification object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Partner Certification object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Partner Certification information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Certification** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

> **Note:** To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Partner Contact Data

Use this topic to import Partner Contact data into Oracle Applications Cloud. You can use the Import Management to create or update Partner Contact records.

To import Partner Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Partner Contact data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Partner Contact object, this attribute is PartyId.
- **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 Partner Contact object, the attribute is PartyNumber.

Required Attributes and Validations for Partner Contact Object

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

This table lists the required attributes for importing new Partner Contact records, required attributes for updating Partner Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Partner Contact import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Contact record	Updating an Existing Partner Contact record
FirstName	The first name of the person	Text	150	A value is required if creating a new person party.	Required	Not required
LastName	The last name of the person	Text	150	A value is required if creating a new person party.	Required	Not required
EmailAddress	The Email address of the partner contact	Text	320	While importing the partner contacts which have the **`createUserAccou`** attribute set to 'Y', the **`username`** value must be unique. If the **`username`** attribute isn't set, then the email address value should be unique.	Required	Not Required
CompanyNumber	The company number of the partner	Text	30	The value must exist in the column COMPANY_ MUMBER of the ZPM_PARTNER_ PROFILES table. Identify the COMPANY_ NUMBER for an existing partner by exporting the Partner Profile object. Navigate to the following in the Setup and Maintenance work area:	A value is required either for CompanyNumber or PartnerPartyId.	Not Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Contact record	Updating an Existing Partner Contact record
				• Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes		
PartyNumber	The party number of the contact	Text	30	The PartyNumber must be unique when you're creating a new record and the value needs to be the same as that of a valid partner contact, when you're updating an existing record.	A value is optionally required when creating a record.	A value is required either for PartyNumber or PartyId when updating a record.
PartnerPartyId	The unique ID for the existing partner organization's party record in the destination table	Number	18	Identify the PARTY_ID for an existing partner party by exporting the Partner Profile object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes	A value is required either for CompanyNumber or PartnerPartyID when creating a record.	Not required
PrimaryFlag	Indicates if the partner contact is a primary contact	String	1	Set this attribute for a partner contact, if the corresponding partner doesn't	Required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Contact record	Updating an Existing Partner Contact record
				have a primary contact. This can be either Y or N.		

Note: When importing partner contacts, use the CompanyNumber attribute. Don't use the PartnerCompanyNumber attribute.

You can view the Partner Contact 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Partner Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Contact** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Note: To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Partner Focus Area Data

You can use the import functionality to create Partner Focus Area records.

You can import Partner Focus Area records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Partner Focus Area data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Partner Focus Area data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Partner Focus Area import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Partner Focus Area records while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Partner Focus Area attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Partner Focus Area child objects. Note that you must have imported the CSV file for Partner Focus Area object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing a new Partner Focus Area record that has a source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Partner Focus Area Object

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

This table lists the required attributes for Partner Focus Area records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Partner Focus Area record
ProductName	The name of the specialty product.	No Validation	Either the ProductId or the ProductName is required.
PartnerDimMembersId	The primary key of the partner focus area record.	No Validation	Auto-generated
CompanyNumber	The company number of the partner company.	No Validation	Required

Note: The Update operation isn't supported for Partner Focus Area records.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Partner Focus Area object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Partner Focus Area object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Partner Focus Area information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Focus Area** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

> **Note:** To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Partner Geography Served Data

You can use the import functionality to create Partner Geography Served records.

You can import Partner Geography Served records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Partner Geography Served data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Partner Geography Served data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Partner Geography Served import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Partner Geography Served records while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Partner Geography Served attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Partner Geography Served child objects. Note that you must have imported the CSV file for Partner Geography Served object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing a new Partner Geography Served record that has a source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Partner Geography Served Object

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

This table lists the required attributes for Partner Geography Served records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Partner Geography Served record
PartnerDimMembersId	The primary key for the Partner Geography Served record.	No Validation	Auto-generated
GeographyName	The name of the geography where the partner is located.	No Validation	Either the GeographyName or the GeographyId is required.
OwnerId	The party ID of the partner.	No Validation	Either the Owner ID or the CompanyNumber is required.
CompanyNumber	The company number of the partner.	No Validation	Either the Owner ID or the CompanyNumber is required.

Note: The Update operation isn't supported for Partner Geography Served records.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Partner Geography Served object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Partner Geography Served object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Partner Geography Served information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.

3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Geography Served** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

> **Note:** To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Partner Program Country Data

You can use the Import Management functionality to create or update Partner Program Country records.

To import Partner Program Country records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Partner Program Country data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options to uniquely identify an object record is through the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Partner Program Country object, this attribute is ProgramCountryId.

Required Attributes and Validations for Partner Program Country Object

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

This table lists the required attributes for importing new Partner Program Country records, required attributes for updating Partner Program Country records, prerequisite setup tasks for the attributes, and specific validations, if any, for Partner Program Country import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Program Country record	Updating an Existing Partner Program Country record
ProgramCountryID	The unique identifier of the program country	Integer	18	None	Not required	Not required
CountryCode	The public unique identifier value for the country associated with the partner program	String	2	None.	Required	Not required
PartnerProgramID	Unique identifier for the partner program	Integer	18	None	A value is required if the program number isn't specified.	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Partner Program Country record	Updating an Existing Partner Program Country record
ProgramNumber	A unique number generated for each program	Varchar2	30	None	A value is required if the partner program ID isn't specified.	Not required

You can view the Partner Program Country 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Partner Program Country** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Program Country** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Partner Program Tier Data

You can use the Import Management functionality to create, update, or delete Partner Program Tier records.

To import Partner Program Tier records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Partner Program Tier data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Partner Program Tier object, this attribute is ProgramTierId.

Required Attributes and Validations for Partner Program Tier Object

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

This table lists the required attributes for importing new Partner Program Tier records, required attributes for updating Partner Program Tier records, prerequisite setup tasks for the attributes, and specific validations, if any, for Partner Program Tier import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Partner Program Tier record	Updating an Existing Partner Program Tier record
ProgramTierId	The unique identifier of the program tier	Integer	18	None	Not required	Required
TierId	The unique identifier of the partner tier	Integer	18	None	Required	Required
PartnerProgramID	Unique identifier and primary key for the partner program	Integer	18	None.	A value is required if the program number isn't specified.	Not Required
ProgramNumber	A unique number generated for each partner program	Varchar2	30	None	A value is required if the partner program ID isn't specified.	Not required

You can view the Partner Program 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.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Partner Program Tier** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Program Tier** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Partner Type Data

You can use the import functionality to create Partner Type records.

You can import Partner Type records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Partner Type data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Partner Type data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Partner Type import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Partner Type records while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Partner Type attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Partner Type child objects. Note that you must have imported the CSV file for Partner Type object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing a new Partner Type record that has a source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Partner Type Object

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

This table lists the required attributes for Partner Type records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Partner Type record
IntegrationId	This is an internal attribute and should not be used.	No Validation	Not Required
PartnerTypeName	The partner type assigned to the partner.	No Validation	Either the PartnerTypeName or the PartnerTypeCode is required.
PartnerDimMembersId	The primary key of the Partner Type object.	No Validation	Auto-generated
PartnerCompanyNumber	The company number of the partner.	No Validation	Required

Note: The Update operation isn't supported for Partner Type records.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Partner Type object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Partner Type object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Partner Type information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Partner Type** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

> **Note:** To access and submit the import activities for Partner Contact, the user must be assigned the job roles of the Channel operations manager.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Performance Measure Credit Category Data

You can use Import Management to create Performance Measure Credit Category records.

To import Credit Category records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Credit Category data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Performance Measure Flex Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Performance Measure Credit Category records, prerequisite setup tasks for the attributes, and specific validations, if any, for Performance Measure Credit Category import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Performance Measure Credit Category record
PerformanceMeasureCreditCategor	The unique identifier generated internally that associates a performance measure with a credit category.	None	Not Required
PerformanceMeasureId	The unique identifier for a performance measure.	Must be the identifier for an existing performance measure.	Required
CreditCategoryId	The unique identifier of a credit category.	Must be the identifier for an existing credit category.	Conditionally Required. Provide a value if CreditCategoryName isn't populated.
CreditCategoryName	The name of the credit category.	Must be a valid credit category.	Conditionally Required. Provide a value if CreditCategoryId isn't populated.

You can view the Performance Measure Credit Category object with 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Performance Measure Credit Category** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Performance Measure information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Performance Measure Credit Category from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Performance Measure Flex Data

You can use Import Management to create and update Performance Measure Flex records.

To import Performance Measure Flex records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Performance Measure Flex data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Performance Measure Flex Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Performance Measure Flex records, required attributes for updating Performance Measure Flex records, prerequisite setup tasks for the attributes, and specific validations, if any, for Performance Measure Flex import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Performance Measure Flex record	Updating an Existing Performance Measure Flex record
FormulaId	The unique identifier of the performance measure generated internally.	None	Required	Required
__FLEX_Context	The flex context segment code for the performance measure. It determines which context-sensitive segments are displayed.	None	Conditionally Required. Provide a value if __FLEX_Context_DisplayValue isn't populated.	Conditionally Required. Provide a value if __FLEX_Context_DisplayValue isn't populated.
__FLEX_Context_DisplayValue	The flex context segment display name for the performance measure. It determines which context-sensitive segments are displayed.	None	Conditionally Required. Provide a value if __FLEX_Context isn't populated.	Conditionally Required. Provide a value if __FLEX_Context isn't populated.

You can view the Performance Measure Flex object with 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Performance Measure Flex** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Performance Measure Flex information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Performance Measure Flex from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Performance Measure Rate Dimensional Input Data

You can use Import Management to update Performance Measure Rate Dimensional Input records.

To import Performance Measure Rate Dimensional Input records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Performance Measure Rate Dimensional Input Record data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Performance Measure Rate Dimensional Input Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for updating Performance Measure Rate Dimensional Input records, prerequisite setup tasks for the attributes, and specific validations, if any, for Performance Measure Rate Dimensional Input import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Existing Performance Measure Rate Dimensional Input record
PlanComponentInputExpressionId	The unique identifier of the input expression record for the plan component.	This gets created when the rate table is assigned to the plan component. So it has to be an existing value.	Required
IncentiveFormulaId	The unique identifier of the incentive formula record. There can be only one incentive formula for one plan component.	None	Required
RateDimSequence	The order of the input expressions for the rate table.	None	Required
InputExpressionName	The name of the input expression for the rate dimension of a rate table used in the plan component.	The expression name must exist.	Conditionally Required. Provide a value if InputExpressionId isn't populated.
InputExpressionId	The unique identifier of the input expression for the rate dimension of a rate table.	The expression id must exist.	Conditonally Required. Provide a value if InputExpressionName isn't populated.
SplitFlag	When splitting the rate across tiers, the split option can apply to only one rate dimension input expression. This specifies which rate dimension input expression (rate dimension) to use.	Possible values are Y or N	Not Required

You can view the Performance Measure Rate Dimensional Input object with 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Performance Measure Rate Dimensional Input** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Performance Measure Rate Dimensional Input information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Performance Measure Rate Dimensional Input from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Performance Measure Score Card Data

You can use Import Management to create and update Performance Measure Score Card records.

To import Performance Measure Score Card records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Performance Measure Score Card data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Performance Measure Score Card Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Performance Measure Score Card records, required attributes for updating Performance Measure Score Card records, prerequisite setup tasks for the attributes, and specific validations, if any, for Performance Measure Score Card import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Performance Measure Score Card record	Updating an Existing Performance Measure Score Card record
PerformanceMeasureScorec	The unique identifier generated internally that associates a scorecard within a performance measure.	None	Not Required	Not Required
PerformanceMeasureId	The unique identifier for a performance measure.	Must be the identifier for an existing performance measure.	Required	Required
ScorecardId	The unique identifier of the the scorecard generated internally.	Must be the identifier for an existing rate table.	Conditionally Required. Provide a value if ScorecardName isn't populated.	Required
ScorecardName	The name of the scorecard.	Must be the name of an existing rate table.	Conditionally Required. Provide a value if ScorecardId isn't populated.	Not Required
StartDate	The date when the score card becomes active for the performance measure.	Must be a valid date.	Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Performance Measure Score Card record	Updating an Existing Performance Measure Score Card record
EndDate	The date when the scorecard becomes inactive for the performance measure.	Must be a valid date.	Not Required	Not Required

You can view the Performance Measure Score Card object with 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Performance Measure Score Card** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Performance Measure information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Performance Measure Score Card from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

How do I import person data?

You can use import management to create or update Person data.

You can import Person records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Person data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Person data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Person import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Person while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: You can pass the PUID when creating Person records. If the PUID isn't passed, it will be auto generated. You can optionally provide the PUID when creating Person records. If you're updating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Persons or are updating Persons that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Person Object

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

This table lists the required attributes for Person records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
PartyId	The internal ID for the Person type party	When updating the record, this should already exist.	Not required	Conditionally required. To identify a person record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber • PartyId
Country	The country code of the postal address	Identify valid country codes using the Setup and Maintenance, Manage Territories task.	Conditionally required A value is required only when you're creating an address for the Person record.	The attribute is neither required nor conditionally required.
AddressNumber	The internal unique identifier that's internally generated when creating an address	No validation	This is a PUID for Address. If a value is passed, it will be imported. Otherwise, it will be auto-generated.	Pass the AddressNumber.
OrganizationPartyNumber	The party number of the organization to which the person is related	This should already exist.	Not required	Not required
DeceasedFlag	The option that indicates whether the person imported is deceased	Y or N The default value is N.	Not required	Not required
PartyNumber	The unique identifier of the party	Know the party number. To obtain a list of all party IDs and party numbers, export the Person object.	This is a PUID for Person. If a value is passed, it will be imported. Otherwise, it will be auto-generated.	Conditionally required To identify a person record, use one of these:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
				• Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber • PartyId
FirstName	The first name of the person	No validation	Required. A value is required for the FirstName, MiddleName, or LastName.	Not required
MiddleName	The middle name of the person	No validation	Required. A value is required for the FirstName, MiddleName, or LastName.	Not required
LastName	The last name of the person	No validation	Required. A value is required for the FirstName, MiddleName, or LastName.	Not required
PartyUsageCode	Specifies the party usage code to which the person is associated	Select one of the following values: • EXTERNAL_PAYEE • CONTACT • PAYMENT_ISSUING_ AUTHORITY • PARTY_OF_INTEREST • VIRTUAL_ASSISTANT • FS_TECH You can assign a limited set of unrestricted party usages through the Person import object. To create persons of other types, use the specific import objects created for those purposes.	Required	Not required
SourceSystem	The original source system name	Know the source system. To view source systems, use the Manage Trading Community Source System task.	Conditionally required To identify a person record, use one of these: • Combination of SourceSystem and SourceSystemReferenc • PartyNumber	Conditionally required To identify a person record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber • PartyId
SourceSystemReferenceValu	The identifier in the original source system	Know the source system reference value. To view source system reference, use the Manage Trading	Conditionally required To identify a person record, use one of these:	Conditionally required To identify a person record, use one of these:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
		Community Source System task.	• Combination of SourceSystem and SourceSystemReferenc • PartyNumber	• Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber • PartyId

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Person object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Person object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Person information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Person** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- Why can't I see the people I just imported?

Import Your Plan Component Data

You can use Import Management to create and update Plan Component records.

To import Plan Component records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Plan Component data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use the public unique identifier to identify records. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for the Plan Component Object

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

This table lists the required attributes for creating and updating Plan Component records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Record	Updating an Existing Plan Component Record
PlanComponentId	The unique identifier of the plan component generated internally.	None	Not Required	Required
Name	Name of the plan component.	None	Required	Not Required
CalculateIncentive	The nature of the plan component calculating per event or per interval.	Possible values include COMMISSION for per event, and BONUS for per interval. A list of acceptable values is defined in the lookup CN_PLAN_INCENTIVE_TYPE.	Required	Not Required
OrgId	The unique ID of the business unit to which the plan component belongs.	Must be a valid business unit ID.	Required	Required
EarningType	The attribute used to classify earnings into monetary and nonmonetary categories.	The attribute used to classify earnings into monetary and nonmonetary categories.		
StartDate	The date on which the plan component becomes active.	Must be a valid date.	Required	Not Required
EndDate	The date on which the plan component becomes inactive.	Must be a valid date.	Required	Not Required
IncentiveType	The attribute repesenting incentive type, such as bonus or commission	Possible values include BONUS, COMMISSION, and STANDARD. A list of acceptable values is defined in the lookup CN_REPORT_GROUP.		
ValidforCalculation	Indicates whether the plan component is ready for calculation.	Possible values include COMPLETE for valid and ready for calculation and INCOMPLETE for not valid and not ready for		

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Record	Updating an Existing Plan Component Record
		calculation. The default value is INCOMPLETE. A list of acceptable values is defined in the lookup CN_FORMULA_STATUS.		
Description	The description of the plan component.	None	Not Required	Not Required
CalculationPhase	The phase in which the application considers plan component for calculation. Two supported phases: Phase 1 and Phase 2.	Possible values include 1 and 2.The default value is 1. A list of acceptable values is defined in the lookup CN_CALCULATION_PHASE.		
PaymentPlanCategory	The payment plan category which is used to allocate payment adjustments from a participant's payment plan among plan components.	Possible values include BONUS , COMMISSION , GUARANTEE , and STANDARD which is a generic term applied to any plan component used for determining payment plan adjustments. The default value is STANDARD. A list of acceptable values is defined in the lookup CN_PAYMENT_PLAN_CATEGORY.		
PaymentMadeThroughThird	Indicates whether the payment for this plan component can be made through other resources.	Possible values include N or FALSE and Y or TRUE. The default value is FALSE. A list of acceptable values is defined in the lookup CN_YES_NO.		
DisplayName	The name of the plan component that is displayed on the sales representative's user interface.	None	Not Required	Not Required
SplitOption	Indicates how to split the input number to a rate table dimension.	Possible values include NONE to apply a single rate for the entire attainment, NON_PROPORTIONAL to apply multiple rates, which are fixed for an attainment within a tier, PROPORTIONAL to apply multiple rates, which are proportional for an attainment within a tier, and PROPORTIONAL_WITH_THRESHOLD which is proportional only after	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Record	Updating an Existing Plan Component Record
		the first threshold tier. The default value is NONE. A list of acceptable values is defined in the lookup CN_SPLIT_TYPE_OPTION.		

You can view the Plan Component object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Plan Component** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compenstation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Plan Components Flex Data

You can use Import Management to create and update Plan Components Flexfield records.

To import Plan Component Flexfield records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Plan Component Flexfield data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Plan Component Flexfield Object

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

This table lists the required attributes for creating and updating Plan Component Flexfield records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component Flexfield records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Flexfield Record	Updating an Existing Plan Component Flexfield Record
PlanComponentId	The unique identifier of the plan component generated internally.	None	Required	Required
__FLEX_Context	The flex context segment code for the plan component. It determines which context-sensitive segments are displayed.	None	Conditionally Required. Provide a value if __FLEX_Context_DisplayValue isn't populated.	Conditionally Required. Provide a value if __FLEX_Context_DisplayValue isn't populated.
__FLEX_Context_DisplayValue	The flex context segment display name for the plan component. It determines which context-sensitive segments are displayed.	None	Conditionally Required. Provide a value if __FLEX_Context isn't populated.	Conditionally Required. Provide a value if __FLEX_Context isn't populated.
Attribute1	Attribute 1 of the descriptive flexfield.	None	Required	Not Required
Attribute2	Attribute 2 of the descriptive flexfield.	None	Not Required	Not Required

You can view the Plan Component Flexfield object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Plan Component Flexfield** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compensation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Plan Component Incentive Formula Data

You can use Import Management to update Plan Component Incentive Formula records.

To import Plan Component Incentive Formula records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Plan Component Incentive Formula data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Plan Component Incentive Formula Object

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

This table lists the required attributes for updating Plan Component Incentive Formula records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component Incentive Formula records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Existing Plan Component Incentive Formula Record
IncentiveFormulaId	The unique identifier for the incentive formula record. There can be only one incentive formula for one plan component. This gets created when the plan component header record gets created.	This gets created when the plan component header record gets created. So IncentiveFormulaId has to be an existing value.	Required
IncentiveFormulaExpressionName	The name for the expression used in the incentive formula. This is the expression that is used to calculate the earnings.	The expression name must exist.	Required
IncentiveFormulaExpressionId	The unique identifier of the expression record used in the incentive formula. This is the expression that is used to calculate the earnings.	The expression id must exist.	Conditionally Required. Provide a value if IncentiveFormulaExpressionName isn’t populated.
TrueUpFlag	Indicates whether the earnings calculated for the current period includes the previously calculated or paid amount (Cumulative.) Calculation engine then automatically subtracts previous earnings from the current earning calculated.	Possible values are Y or N	Not Required
PayoutFrequency	This is the interval value that determines how often the earning is calculated. Interval would represent a unit of time like month, quarter, year.	The default value is '-1000'.	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Existing Plan Component Incentive Formula Record
ResetInterval	It is the span of time for which the true up or cumulative earnings are calculated. Interval would represent a unit of time like month, quarter, year.	This is applicable only if True Up is Y.	Not Required
IncludeIndirectCredits	Type of indirect credits to include in the calculation, for the plan component.	Possible values include ALL for all indirect credits, MGR for only rollup indirect credits, NONE for no indirect credits, and TEAM for only team indirect credits. The default value is NONE. A list of acceptable values is defined in the lookup CN_PLAN_INDIRECT_CREDIT.	Not Required
CalculateEnddateParticipantFlag	Indicates whether participants who have an end date before the current calculation period are considered for calculation.	Possible values are Y or N. A list of acceptable values is defined in the lookup CN_YES_NO. This is only applicable if Calculate Incentive field is Per interval ('BONUS').	Not Required

You can view the Plan Component Incentive Formula object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Plan Component Incentive Formula** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compenstation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

How do I import plan component performance measure data?

You can use Import Management to create and update Plan Component Performance Measure records.

To import Plan Component Performance Measure records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Plan Component Performance Measure data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Plan Component Performance Measure Object

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

This table lists the required attributes for creating and updating Plan Component Incentive Formula records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component Incentive Formula records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Performance Measure Record	Updating a Plan Component Performance Measure Record
PlanComponentPerformanc	The unique identifier generated internally that associates a plan component with a compensation plan.	None	Not Required	Required
PerformanceMeasureId	The unique identifier for a compensation plan.	Must be the identifier for an existing compensation plan.	Required	Required
PlanComponentId	The unique identifier of a plan component.	Must be the identifier for an existing plan component.	Required	Required
CalculationSequence	Indicates the order in which the calculation engine considers a performance measure within a plan component.	Must be a number. The default value is 1.	Not Required	Not Required
PerformanceMeasureWeight	The percentage of influence a plan component has on the compensation plan.	Must be a number. The default value is 100.	Not Required	Not Required
EarningBasis	Specifies whether attainment and earnings calculations use the same credit categories and whether the incentive formula uses the measure attainment in calculations.	Possible values include Y, N. The default value is Y.	Not Required	Not Required

You can view the Plan Component Performance Measure object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Plan Component Performance Measure** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compensation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Plan Component Rate Dimensional Input Data

You can use Import Management to update Plan Component Rate Dimensional Input Data records.

To import Compensation Plan Component records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Plan Component Rate Table data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Plan Component Rate Dimensional Input Object

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

This table lists the required attributes for updating Plan Component Rate Dimensional Input records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component Rate Dimensional Input records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Updating an Existing Plan Component Rate Dimensional Input Record
PlanComponentInputExpressionId	The unique identifier of the input expression record for the plan component.	This gets created when the rate table is assigned to the plan component. So it has to be an existing value.	Required
IncentiveFormulaId	The unique identifier for the incentive formula record. There can only be one incentive formula for one plan component.	None	Required
RateDimSequence	The order of the input expressions for the rate table.	None	Required
InputExpressionName	The name of the input expression for the rate dimension of a rate table used in the plan component.	The expression name must exist.	Conditionally Required. Provide a value if InputExpressionId isn't populated.
InputExpressionId	The unique identifier of the input expression for the rate dimension of a rate table.	The expression id must exist.	Conditionally Required. Provide a value if InputExpressionId isn't populated.
SplitFlag	When splitting the rate across tiers, the split option can apply to only one rate dimension input expression. This specifies which rate dimension input expression (rate dimension) to use.	Possible values are Y or N	Not Required

You can view the Plan Component Rate Table object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Plan Component Rate Dimensional Input** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compenstation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Plan Component Rate Table Data

You can use Import Management to create and update Plan Component Rate Table records.

To import Compensation Plan Component records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Plan Component Rate Table data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.

- Ensure prerequisite steps are complete, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Plan Component Rate Table Object

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

This table lists the required attributes for creating and updating Plan Component Rate Table records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component Rate Table records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Rate Table Record	Updating an Existing Plan Component Rate Table Record
PlanComponentRateTableId	The unique identifier of the rate table associated to the plan component generated internally.	None	Not Required	Required
IncentiveFormulaId	The unique identifier for the incentive record. There can only be one incentive formula for one plan component.	This gets created when the plan component header record gets created. So IncentiveFormulaId has to be an existing value.	Required	Required
RateTableId	The unique identifier of the rate table.	The rate table id should exist in the business unit.	Conditionally Required. Provide a value if RateTableName isn't populated.	Conditionally Required. Provide a value if RateTableName isn't populated.
RateTableName	The name of a rate table.	The rate table name should exist in the business unit.	Conditionally Required. Provide a value if RateTableId isn't populated.	Conditionally Required. Provide a value if RateTableId isn't populated.
StartDate	The date when the rate table becomes active for the plan component.	Must be a valid date.	Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Rate Table Record	Updating an Existing Plan Component Rate Table Record
EndDate	The date when the rate table becomes inactive for the plan component.	Must be a valid date.	Required	Not Required

You can view the Plan Component Rate Table object and 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Plan Component Rate Table** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Compenstation Plan Component from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Price Book Header Data

You can use the Import Management functionality to create or update Price Book Header records.

To import Price Book Header records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Price Book Header data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Price Book Header object, this attribute is PriceBookId .

- 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 Price Book Header object, the attribute is PricebookCode.

Required Attributes and Validations for Price Book Header Object

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

This table lists the required attributes for importing new Price Book Header records, required attributes for updating Price Book Header records, prerequisite setup tasks for the attributes, and specific validations, if any, for Price Book Header import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Price Book Header Record	Updating an Existing Price Book Header Record
CurrencyCode	Specifies the currency associated with the price book header	String	15	LOV validation for the existing currency code	Required	Not required
Name	Specifies the name of the price book header	String	150	Enter a unique value.	Required Enter a unique value.	You can update the Price book header only if it's in the DRAFT status.
StatusCode	Specifies the pre-defined code used to indicate the status	String	30	When creating a record, the valid values are DRAFT or ACTIVE. When updating a record, the changes acceptable are: • DRAFT to ACTIVE • ACTIVE to EXPIRED • EXPIRED to ACTIVE	Defaults to DRAFT	Optional
PricebookId	A unique identifier for the price book	Long	18	The value is auto generated.	The value is auto generated.	Required
PricebookCode	The code indicating the price book	String	80	Setup the on prefix and radix. Navigate to the following	The value is auto generated. You can also enter a value.	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Price Book Header Record	Updating an Existing Price Book Header Record
				in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Public Unique Identifier Sequence Generation		
Description	A brief description of the price book	String	1999	No validation	Not required	Optional
HeaderExternalKey	Specifies the external Keys to identify the price book header	String	120	The combination of HeaderExternalKey and HeaderExternalSou has to be unique.	Default Value	Optional
HeaderExternalSou	Specifies the external source keys to identify the price book header	String	120	The combination of HeaderExternalKey and HeaderExternalSou has to be unique.	Default Value	Optional

You can view the Price Book Header 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Price Book Header** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Price Book Header** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Price Book Line Data

You can use the Import Management functionality to create or update Price Book Line records.

To import Price Book Line records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Price Book Line data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Price Book Line object, this attributes are InvItemId, InvOrgId, PricebookId and PricebookItemId.
- 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 Price Book Line object, the attributes are ItemNumber and PricebookCode.

Required Attributes and Validations for Price Book Line Object

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

This table lists the required attributes for importing new Price Book Line records, required attributes for updating Price Book Line records, prerequisite setup tasks for the attributes, and specific validations, if any, for Price Book Line import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Price Book Line Record	Updating an Existing Price Book Line Record
InvItemId	The internal identifier of the item or the product for which the list price is specified.	Long	18	Ensure that the data used is part of the BASE usage catalog hierarchy.	A value is required if the primary key is used.	Not required
PriceUOMCode	The internal code of the unit of measure in which the item or the product is priced.	String	30	This is validated for the applicable UOM for the item used.	Required	Optional
ItemNumber	The number of the item for which the list price is specified.	String	300	Ensure that the data used is part of the BASE usage catalog hierarchy.	A value is required if the PUID is used.	A value is required if the PUID is used.
PricebookItemId	The internal identifier of the price book item.	Long	18	This is auto generated.	A value is auto generated.	A value is required if the primary key is used.
PricebookId	The internal identifier of the price book which is the parent of this price book line.	Long	18	Parent record primary key	A value is required, if the primary key is used.	Not required
PricebookCode	The unique identifier of the price book	String	80	Parent record PUID	A value is required if the PUID is used.	A value is required if the PUID is used.
ListPrice	The list price of the item or the product referred in the inventory item ID	BigDecimal		Ensure that this value is greater than zero for price books either in "ACTIVE" or "EXPIRED" status.	A value is required, if the price book is either in the "ACTIVE" or "EXPIRED" status.	Optional
ItemExternalSource	The external key and source key from the source system are used to uniquely identify and update or delete the price book line	String	120	Ensure that the combination of ItemExternalSource and ItemExternalKey is unique.	Not required	Optional
ItemDescription	A brief description of the price book item	String		No validation	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Price Book Line Record	Updating an Existing Price Book Line Record
InvOrgId	The unique identifier of the inventory organization	Long	18	Validate for the applicable organization ID for the selected item.	A value is required, if the primary key is used.	Not required
CurrencyCode	Specifies the currency associated with the price book header	String	15	Validate for the existing currency code.	Not required	Optional
ItemExternalKey	The external key and source key from the source system are used to uniquely identify a price book which is the parent of this price book line	String	120	Ensure that the combination of ItemExternalSource and ItemExternalKey is unique.	Not required	Optional

You can view the Price Book Line 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Price Book Line** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Price Book Line** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.

5. In the **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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Product Data

You can use the Import Management functionality to create or update Product records.

To import Product records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Product data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Product object, the attributes are OrganizationId and InventoryItemId.
- **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 Product object, the attribute is ItemNumber.

Required Attributes and Validations for Product Object

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

This table lists the required attributes for importing new Product records, required attributes for updating Product records, prerequisite setup tasks for the attributes, and specific validations, if any, for Product import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Record	Updating an Existing Product Record
OrganizationId	A value that uniquely identifies the organization	Long	18	• SCM setup to create a master inventory organization • Auto populates with value setup for "Sales Products Item Organization" under	Don't specify a value. The value is auto populated.	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Record	Updating an Existing Product Record
				manage product group profile options		
Name	Name of the product	String	240	No validation	Required	Required
DefaultUOMCode	The default unit of measure (UOM) code for the product	String	3	SCM setup to UOM, mandatory for creating products. This is a standard DCL field.	Required	Not required
DefaultUOM	The default unit of measure (UOM) for the product	String	25	Either the UOMCode or the UOM is mandatory. It is validated against the UOM DCL.	Required only when the Default UOMCode isn't specified	Not required
ProductType	Specifies the Sales Product Type	String	80	No validation	Not required	Not required
EligibleToSell	Indicates whether the item can be sold	String	80	No validation	Not required	Not required
InventoryItemId	A unique identifier for the inventory item	Long	18	No validation	Don't specify a value. The value is auto populated.	Required
ItemNumber	Unique system generated ID of the product	String	300	This has to be unique. If you don't specify a value, it will be auto generated. You can't update this value.	Required A value is auto generated, if not specified. Ensure that you provide a unique value.	Required
ItemCatalogGroupId	A unique value that provides metadata common to all items that share the category	Long	18	No validation	Not required	Optional
Description	Brief description of the product	String	4000	No validation	Not required	Optional
ProductTypeCode	Specifies the code of the product type	String	30	Select a value from the drop down list.	Not required	Optional

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Record	Updating an Existing Product Record
SalesProductLooku	The lookup type for the sales product type	String	80	No validation	Not required	Optional
ModelConfigAttribu	Model attributes	String	4000	No validation	Not required	Optional
ModelName	Name of the model	String	1000	No validation	Not required	Optional
InventoryItemStatus	Specifies the status code of the inventory item	String	10	Defaults to Active status	Required The value is auto populated to Active.	Optional
EligibleToSellFlag	Indicates whether the item can be sold	String	1	This can be either Y or N.	Required The default value is Y.	Optional
EligibleForService	Indicates whether the item is enabled for service	String		This can be Y only when the sales product type is either empty or has any of the following values: • Goods • Installation • Training • Subscription • One time service	Not required	Optional
AttachmentEntityNa	Name of the attachment entity	String		No validation	Not required	Optional
CSSEnabled	Enable Customer Self-Service	String	1	This can be either Y or N.	Not required	Optional

You can view the Product 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Product** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Product** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

How do I import product group data?

You can use the import management to create or update Sales Catalog Product Group or Product Group records.

To import Product Group/Sales Catalog Product Group records:

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

How You Map Your Source Data to Target Object Attributes

To import Product Group data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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. 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 Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Product Group object, this attribute is ProdGroupId.
- **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 Product Group object, the attribute is ProductGroupReferenceNumber.

Required Attributes and Validations

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

This table lists the required attributes for importing new Product Group records, required attributes for updating Product Group records, prerequisite setup tasks for the attributes, and specific validations, if any, for Product Group import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Record	Updating an Existing Product Group Record
ProdGrpDetailsId	The unique identifier of the product group details.	Long	18	No validation	Not required	Not required
StartDate	The date and time from when the product group is available in the catalog.	Time stamp		The start date can't be later than the end date.	Not required	Optional
EndDate	The date and time when the product group is no longer available in the catalog.	Time stamp		The end date has to be later than the start date.	Not required	Optional
InternalName	The product group's unique name	String	150	Enter a unique name.	Required	This can't be updated.
ProdGroupName	The product group name displayed in the catalog.	String	250	No validation	Required	Optional
ActiveFlag	Indicates whether the product group is active or inactive.	String	1	Enter either Y or N.	Defaults to Y	Optional
AllowDuplicateCont	Indicates whether products or product groups are allowed to be added to the product group hierarchy more than once.	String	Required	Optional	Defaults to N	Optional
ProdGroupId	Unique identifier of the product group	Long	18	No validation	A value is auto generated.	Required
ProductGroupRefere	The unique value used to identify the product group.	String	50	Setup the on prefix and radix. Navigate to the following in the Setup and	A value is auto generated. You can also enter a value.	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Record	Updating an Existing Product Group Record
				Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Public Unique Identifier Sequence Generation		
RevenueRoleCode	The code indicating the revenue role associated with the product group. For example, Sales revenue line set or Sales revenue line set member.	String	30	FCL validated against MOO_ REVENUE_ROLE lookup	Not required	Optional
RevenueCategoryCo	The code indicating the revenue category associated with the product group. For example, Software, Maintenance, Service, Training, Hardware, or Back Maintenance.	String	30	FCL validated against MOO_ REVN_CATEGORY lookup	Not required	Optional
AllowSelectionFlag	Indicates whether the product group is available for selection	String	1	Enter either Y or N. The import operation fails, if updating a record results in: • Circular hierarchy • Parent product group with allow duplicate N and child with Y. • Hierarchy with allow duplicate N results in	Defaults to Y	Optional

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Record	Updating an Existing Product Group Record
				repeated child/ products.		
ModelName	Unique name of the model	String	1000	No validation	Not required	Optional
ModelConfigAttribu	Model attributes	String	4000	No validation	Not required	Optional
ProdGroupDescripti	Brief description of the product group	String	1000	No validation	Not required	Optional
UsageRootFlag	Indicates whether the product group is the root product group in a hierarchy.	String	1	Enter either Y or N.	Defaults to N	Optional
AttachmentEntityNa	Unique name of the Attachment Entity	String	255	No validation	Not required	Optional

You can view the Product Group 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

You provide the .CSV file as input during the file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

You can either create a CSV file on your own or use templates available in preexisting mappings. To download a template:

1. In the **Navigator**, under **Tools**, click **Import Management**.
2. Click **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.

Note: To import the product group successfully, you should split the import file into Group, Subgroup, and Item.

You must edit the template CSV file and provide valid values for the required attributes. You can attach different types of files, giving each file a specific description.

ProductGroup	InternalName	ProdGroupNar	ProdGroupDes	UsageRootFla	ActiveFlag	AllowDuplicat	StartDate	EndDate
PGSIImport_001	PGSIImport_001 InternalName	Display name of PGSIImport_001	Description of PGSIImport_001	Y	Y	Y	05/10/2019 10:10	06/11/2019 11:11

Create the Import Activity

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

To create an import activity:

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

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- How do I import data?

Import Your Product Group Item Data

You can use the Import Management functionality to create or update Product Group Item records.

To import Product Group Item records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Product Group Item data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Product Group Item object, the attributes are InventoryItemId, InvOrgId, and ProdGroupId, when creating a product group item and ProdGroupItemsId, when updating a product group item.

- **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 Product Group Item object, the attributes are ParPGReferenceNumber and ProductNumber.

Required Attributes and Validations for Product Group Item Object

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

This table lists the required attributes for importing new Product Group Item records, required attributes for updating Product Group Item records, prerequisite setup tasks for the attributes, and specific validations, if any, for Product Group Item import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Item Record	Updating an Existing Product Group Item Record
ActiveFlag	Indicates whether the product group item is active or inactive.	String	1	Enter either Y or N.	Defaults to Y	Optional
StartDate	The date and time when the product group item is available in the catalog.	Time stamp		Start date can't be later than the end date.	Not required	Optional
InventoryItemId	A unique identifier for the inventory item	Long	18	No validation	Required	Not required
InvOrgId	The unique identifier of the inventory organization	Long	18	No validation	Required	Not required
EndDate	The date and time after which the product group item is no longer available in the catalog.	Time stamp		Start date can't be later than the end date.	Not Required	Optional
ProductNumber	The product number/code of the product	String	300	No validation	Required if importing the record using the PUID	Required if updating the record using the PUID

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Item Record	Updating an Existing Product Group Item Record
ProdGroupItemsId	Unique identifier for a product group item	Long	18	No validation	Auto generated	Required if updating the record using the ID
ProdGroupId	Unique identifier for a product group	Long	18	No validation	Required	Not required
ParPGReferenceNur	The unique value used to identify the product group.	String	50	No validation	Required if importing the record using the PUID	Required if updating the record using PUID
DisplayOrderNum	Number indicating the order in which this product group is displayed in the sales catalog.	Long	18	No validation	Not Required	Optional

You can view the Product Group 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.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Product Group Item** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Product Group Item** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.

5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Product Group Relation Setup Data

You can use the Import Management functionality to create or update Product Group Relation Setup records.

To import Product Group Relation Setup records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Product Group Relation Setup data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Product Group Relation Setup object, the attributes are RelProdGroupId and ProdGroupRelationshipId, when creating a Product Group Relation Setup record and ProdGroupRelationshipId when updating a Product Group Relation Setup record.
- **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 Product Group Relation Setup object, the attributes are PGDetailsReferenceNumber and ParPGReferenceNumber.

Required Attributes and Validations for Product Group Relation Setup Object

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

This table lists the required attributes for importing new Product Group Relation Setup records, required attributes for updating Product Group Relation Setup records, prerequisite setup tasks for the attributes, and specific validations, if any, for Product Group Relation Setup import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Relation Setup Record	Updating an Existing Product Group Relation Setup Record
ActiveFlag	Indicates whether the product group is active or inactive.	String	1	Enter either Y or N.	Defaults to Y	Optional
RelProdGroupId	A unique identifier of the Product group relationship	Long	18	This is auto generated.	Required	Not Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Relation Setup Record	Updating an Existing Product Group Relation Setup Record
StartDate	The date and time when the product group relation is available in the catalog.	Time stamp		The start date can't be later than the end date.	Not Required	Optional
EndDate	The date and time when the product group relation is no longer available in the catalog.	Time stamp		The start date can't be later than the end date.	Not Required	Optional
PGDetailsReference	The unique value used to identify the product group.	String	50	No validation	Required	Required
ProdGroupRelations	A unique identifier of the product group relation	Long	18	No validation	Not Required A value is auto generated.	Required
ProdGroupId	A unique identifier of the product group	Long	18	No validation	Required	Not required
ParPGReferenceNur	The unique value used to identify the product group.	String	50	No validation	Required	Required
DisplayOrderNum	Number indicating the order in which this product group relation is displayed in the sales catalog.	Long	18	No validation	Not Required	Optional

You can view the Product Group Relation Setup 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Product Group Relation Setup** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Product Group Relation Setup** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Program Benefit Detail Data

You can use the Import Management to create, update, or delete Program Benefit Details records.

To import Program Benefit Detail records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Program Benefit Detail data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Program Benefit Detail object, this attribute is ProgramBenefitDetailID.

Required Attributes and Validations for Program Benefit Detail Object

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

This table lists the required attributes for importing new Program Benefit Detail records, required attributes for updating Program Benefit Detail records, prerequisite setup tasks for the attributes, and specific validations, if any, for Program Benefit Detail import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Program Benefit Detail record	Updating an Existing Program Benefit Detail record
ProgramBenefitDeta	The system-generated unique identifier for the	Integer	18	None	Not required	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating an Program Benefit Detail record	Updating an Existing Program Benefit Detail record
	partner program benefit					
ProgramBenefitID	The unique identifier for the benefit	Integer	18	None	Required	Not required
Name	A unique name for the partner program benefit	Varchar2	155	None	A value is required if the program benefit ID isn't specified.	Not Required
PartnerProgramID	The primary key and unique identifier for the partner program	Integer	18	None	A value is required if the program number isn't specified.	Not required
ProgramNumber	A unique number generated for each partner program	Varchar2	30	None	A value is required if the partner program ID isn't specified.	Not required

You can view the Program Benefit Detail 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Program Benefit Detail** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Program Benefit Detail from the **Object** drop-down list.

4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Program Enrollments Data

You can use Import Management to create or update Program Enrollment records.

To import Program Enrollment records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Program Enrollment data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Program Enrollment object, this attribute is ProgramEnrollmentId.
- **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 Program Enrollment object, the attribute is EnrollmentNumber.

Required Attributes and Validations for Program Enrollment Object

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

This table lists the required attributes for importing new Program Enrollment records, required attributes for updating Program Enrollment records, prerequisite setup tasks for the attributes, and specific validations, if any, for Program Enrollment import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Program Enrollment record	Updating an Existing Program Enrollment record
ProgramEnrollmentId	The unique ID for the existing program enrollment record.	None.	Not required	A value is required if the enrollment number isn't specified.
PartnerPartyId	The internal ID to identify a partner	The partner can't be in the Perspective or Rejected status.	A value is required if the partner company number isn't specified.	Not required
PartnerProgramId	The internal ID to identify a program	The program needs to be in the Published status.	A value is required if the program number isn't specified.	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Program Enrollment record	Updating an Existing Program Enrollment record
ProgramNumber	The public unique identifier to identify a program	The program needs to be in the Published status.	A value is required if the partner program ID isn't specified.	Not required
PartnerCompanyNumber	The public unique identifier to identify a partner	The partner can't be in the Perspective or Rejected status.	A value is required if the partner party ID isn't specified.	Not required
EnrollmentNumber	The public unique identifier to identify an enrollment	None	Not required	A value is required if the program enrollment ID isn't specified.

You can view the Program 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Program Enrollment** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Program Enrollment from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Promotion Data

You can use Import Management to create or update Promotion records.

To import Promotion records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Promotion data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Promotions or are updating Promotions that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Promotion Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Promotion records, required attributes for updating Promotion records, prerequisite setup tasks for the attributes, and specific validations, if any, for Promotion import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Promotion Record	Updating an Existing Promotion Record
SalesPromotionId	The unique identifier of the promotion record	No validation	Not applicable This is system generated.	Not applicable
StatusCode	The status of the promotion record	Navigate to the following in Setup and Maintenance: • Offering: Sales • Functional Area: Sales • Task: Manage Standard Lookups Search for the Promotion Status lookup.	Required	Required
AdjustmentTypeCode	The type of promotion adjustment	Validation based on lookup type Promotion Adjustment Types	Required	Required
Name	The name of the promotion	No validation	Required	Required
SalesPromotionCode	The promotion code applicable to the promotion	No validation	Optional	Optional

You can view the 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Promotion** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Promotion from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Queue Data

You can use Import Management to create or update Queue records.

To import Queue records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Queue data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new queues or are updating queues that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Queue Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Queue records, required attributes for updating Queue records, prerequisite setup tasks for the attributes, and specific validations, if any, for Queue import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Queue Record	Updating an Existing Queue Record
QueueId	The unique identifier of the queue.	No Validation	Not Required	Conditionally Required Either the QueueId or the QueueNumber is required.
QueueName	The name of the queue.	No Validation	Required	Not Required
EnabledFlag	Contains the values, True or False. If True, the queue is enabled. If False, the queue isn't enabled. The default value is True.	No Validation	Not Required	Not Required
ExternalFlag	Indicates whether the automatic agent assignment on the queue is handled by Omnichannel Routing or by a third-party routing system.	No Validation	Not Required	Not Required
StripeCd	The lookup code that defines the stripe code such as CRM or HCM.	No Validation	Not Required	Not Required
AutoRoutingFlag	Contains the values, True or False. If True, then the queue supports automated routing. If False, then the queue supports manual routing. The default value is False.	No Validation	Not Required	Not Required
OverflowEnabledFlag	Indicates whether the Overflow feature is enabled in the queue.	No Validation	Not Required	Not Required
OwnerPartyId	The unique identifier of the user (resource) to whom any service requests in the queue are assigned. The user is responsible for further service request assignment and scheduling.	The party should exist.	Conditionally Required Either the OwnerPartyId or the OwnerPartyNumber is required.	Conditionally Required Either the OwnerPartyId or the OwnerPartyNumber is required.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Queue Record	Updating an Existing Queue Record
OwnerPartyNumber	The public unique identifier of the user (resource) to whom any service requests in the queue are assigned. The user is responsible for further service request assignment and scheduling.	The party should exist.	Conditionally Required Either the OwnerPartyId or the OwnerPartyNumber is required.	Conditionally Required Either the OwnerPartyId or the OwnerPartyNumber is required.
QueueNumber	The public unique identifier of the queue.	No Validation	Not Required	Conditionally Required Either the QueueId or the QueueNumber is required.

You can view the Queue 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Queue** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Queue from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Queue Resource Data

You can use Import Management to create or update Queue Resource records.

To import Queue Resource records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Queue Resource data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new queue resources or are updating queue resources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Queue Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Queue Resource records, required attributes for updating Queue Resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for Queue Resource import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Queue Resource Record	Updating an Existing Queue Resource Record
QueueResourceId	The unique identifier of the queue resource member.	No Validation	Not Required	Required
ObjectId	The unique identifier of the individual resource added as a queue resource member.	The party should exist.	Conditionally Required Either the ObjectId or the PartyNumber is required.	Required
PartyNumber	The public unique identifier of the party record associated with the queue resource member.	The party should exist.	Conditionally Required Either the ObjectId or the PartyNumber is required.	Required
QueueId	The unique identifier of the queue.	The queue should exist.	Conditionally Required Either the QueueId or the QueueNumber is required.	Not Required
QueueNumber	The public unique identifier of the queue to which the resource is associated.	The queue should exist.	Conditionally Required Either the QueueId or the QueueNumber is required.	Not Required
EnabledFlag	Contains the values, True or False. If True, then the queue resource member is enabled. If False, then the	No Validation	Not Required	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Queue Resource Record	Updating an Existing Queue Resource Record
	queue resource member isn't enabled. The default value is True.			

You can view the Queue Resource 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Queue Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue Resource**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Queue Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue Resource**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Queue Resource Team Data

You can use Import Management to create or update Queue Resource Team records.

To import Queue Resource Team records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Queue Resource Team data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new queue resource teams or are updating queue resource teams that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Queue Resource Team Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Queue Resource Team records, required attributes for updating Queue Resource Team records, prerequisite setup tasks for the attributes, and specific validations, if any, for Queue Resource Team import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Queue Resource Team Record	Updating an Existing Queue Resource Team Record
QueueResourceId	The unique identifier of the queue resource team.	No Validation	Not Required	Not Required
ObjectId	The unique identifier of the resource team added as a queue resource member.	The team should exist.	Conditionally Required Either the ObjectId or the TeamNumber is required.	Not Required
TeamNumber	The public unique identifier of the queue resource team.	The team should exist.	Conditionally Required Either the ObjectId or the TeamNumber is required.	Not Required
QueueId	The unique identifier of the queue.	The queue should exist.	Conditionally Required Either the QueueId or the QueueNumber is required.	Not Required
QueueNumber	The public unique identifier of the queue to which the resource is associated.	The queue should exist.	Conditionally Required Either the QueueId or the QueueNumber is required.	Not Required
EnabledFlag	Contains the values, True or False. If True, then the queue resource member is enabled. If False, then the queue resource member isn't enabled. The default value is True.	No Validation	Not Required	Not Required

You can view the Queue Resource Team 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Queue Resource Team** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue Resource Team**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Queue Resource Team from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue Resource Team**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Relationship Data

You can use the Import Management to create or update Relationship records.

You can import Relationship records using these steps:

1. Map your source relationship data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the relationship data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your Relationship data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new relationships or are updating relationships that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Relationship Object

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

This table lists the required attributes for relationship records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Relationship record	Updating an Existing Relationship record
RelationshipRecId	The unique ID for the existing Relationship record in the destination table.	None	Don't provide a value.	Conditionally required Either the RelationshipRecId or a combination of RelationshipSourceSystem and RelationshipSourceSystemReferenceVa is required.
SubjectPartyId	The primary key identifier of the subject in this relationship.	The party must exist.	Either one of SubjectPartyId, SubjectPartyNumber, and a combination of SubjectSourceSystem and SubjectSourceSystemRefere is used to identify the subject party of the relationship.	Optional Either one of SubjectPartyId, SubjectPartyNumber, and a combination of SubjectSourceSystem and SubjectSourceSystemReferenceValue, is used to identify the subject party of the relationship.
RelationshipType	The relationship type name. For example, CUSTOMER_SUPPLIER. A list of valid relationship types is defined in the lookup HZ_RELATIONSHIP_TYPE. The unique ID for the existing customer party record in the destination table.	The party must exist.	Required	Not required
RelationshipCode	Indicates whether this is a forward or a backward relationship code.	A list of valid relationship codes is defined in the lookup PARTY_RELATIONS_TYPE.	Required	Not required
StartDate	The date when the relationship was created.	This should be a valid date.	Optional Defaults to current date	Not required
EndDate	The date when the relationship ends.	This should be a valid date.	Optional	Optional
SubjectType	Subject type of the relationship type.	This should be a valid party type.	Optional	Not required
ObjectType	Object type of the relationship type.	This should be a valid party type.	Optional	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Relationship record	Updating an Existing Relationship record
ObjectPartyId	The primary key identifier of the object in this relationship.	The party must exist.	Either one of ObjectPartyId, ObjectPartyNumber, and combination of ObjectSourceSystem and ObjectSourceSystemReferen is used to identify the object party of the relationship.	Optional Either one of ObjectPartyId, ObjectPartyNumber, and combination of ObjectSourceSystem and ObjectSourceSystemReferenceValue, is used to identify the object party of the relationship.
SubjectPartyNumber	Unique identification number for the subject of relationship	No validation	Either the SubjectPartyId or the SubjectPartyNumber is required.	Either the SubjectPartyId or SubjectPartyNumber, or the combination of SubjectSourceSystem and SubjectSourceSystemReferenceValue is required.
ObjectPartyNumber	Unique identification number for the object of the relationship	The party must exist.	Either one of ObjectPartyId, ObjectPartyNumber, and combination of ObjectSourceSystem and ObjectSourceSystemReferen is used to identify the object party of the relationship.	Optional Either one of ObjectPartyId, ObjectPartyNumber, and combination of ObjectSourceSystem and ObjectSourceSystemReferenceValue, is used to identify the object party of the relationship.
SubjectSourceSystem	Original System ID for the Subject of the Relationship	The source system should exist. You can manage source systems from the Manage Source Systems task.	Conditionally required	Conditionally required
SubjectSourceSystemRefere	Original System Reference for the Subject of the Relationship	No validation	Conditionally Required If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Conditionally Required
ObjectSourceSystem	Original System ID for the Object of the Relationship	No validation	Conditionally required	Conditionally required
ObjectSourceSystemReferen	Original System Reference for the Object of the Relationship	No validation	Conditionally required	Conditionally required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Relationship record	Updating an Existing Relationship record
RelationshipSourceSystem	Original system of this relationship	The party must exist.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Conditionally required Either the RelationshipRecId or a combination of RelationshipSourceSystem and RelationshipSourceSystemReferenceVa is required.
RelationshipSourceSystemR	Original system reference of this relationship	It should be a unique value for a source system.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Conditionally required Either the RelationshipRecId or a combination of RelationshipSourceSystem and RelationshipSourceSystemReferenceVa is required.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the relationship object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Relationship** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the relationship information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Relationship** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Resolution Link Data

You can use the import functionality to create or update Resolution Link records.

To import Resolution Link records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Resolution Link data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Resolution Links. You can determine the internal ID of a record by exporting Oracle Applications 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 Resolution Link object, the attribute is LinkId.
- 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 Resolution Link object, the attribute is LinkNumber.

Required Attributes and Validations for Resolution Link Object

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

This table lists the required attributes for importing new Resolution Link records, required attributes for updating Resolution Link records, prerequisite setup tasks for the attributes, and specific validations, if any, for Resolution Link import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Resolution Link Record	Updating an Existing Resolution Link Record
Link Number	The unique identifier of the link.	String		No validation	Optional If you don't provide a value, the LinkId is considered by default.	Required
Link Status	The status of a link. The list of accepted values are A (active) and I (inactive).	String		You can't create an inactive link.	Optional	Optional Update the status to I to delete a link.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Resolution Link Record	Updating an Existing Resolution Link Record
PartyType	The party type that defines whether the party is an organization, a person, a contact or any other user-defined party type.	String		No validation	Required	You can't update the resolution link.

You can view the Resolution Link 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 file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Resolution Link** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Resolution Link** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Resolution Link Member Data

You can use the import functionality to create or update Resolution Link Member records.

To import Resolution Link Member records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Resolution Link Member data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identifying an object record is through the public unique identifier. 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 Resolution Link Member object, the attributes are LinkNumber and PartyNumber.

Required Attributes and Validations for Resolution Link Member Object

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

This table lists the required attributes for importing new Resolution Link records, required attributes for updating Resolution Link Member records, prerequisite setup tasks for the attributes, and specific validations, if any, for Resolution Link Member import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Resolution Link Member Record	Updating an Existing Resolution Link Member Record
Link Number	The unique identifier of the link.	String		No validation	Required	Required
PartyId	The unique internal identifier of a link member.	Long	18	Either the PartyId or the PartyNumber is required to uniquely identify the link member record with which the link is associated.	Conditionally Required	Don't use when updating a resolution link member.
PartyNumber	The unique identifier of a link member.	String		No validation	Required	You can't update the resolution link.
MemberStatus	The status of a link member. The list of accepted values	String		You can't create an inactive link member.	Optional	Optional.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Resolution Link Member Record	Updating an Existing Resolution Link Member Record
	are A (active) and I (inactive).					Update to I to remove the link member.
MasterFlag	The master member of the link.	String		The accepted values are Y or N.	Required	Optional. Update to Y to change the master.

You can view the Resolution Link 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Resolution Link Member** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Resolution Link Member** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Resource Data

How do I import resource data?

You can use import management to create or update resource records.

To import resource records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your resource data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.
- Use the Manage Business Unit task to set up appropriate business units.
- Use the Manage Legal Entity task to set up appropriate legal entities .
- Use the Manage Resource Roles task to define resource roles. Sales Administrator role is required to load the resource data.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. If you're creating new records, then you can provide a user-friendly public unique identifier (Party Number). 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 resource object, the attribute is ResourcePartyNumber.

Required Attributes and Validations for the Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. When you create a new resource, associated employee records are also created. For more information about creating resources for existing employee records, see the topic "Example of Adding Resource Profile to Existing Employees". The following table lists the required attributes for importing new resource records, required attributes for updating resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for resource import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Resource Record	Updating an Existing Resource Record
FirstName	The first name of the resource.	No validation	Required	Pass the party number as the key.
LastName	The last name of the resource.	No validation	Required	Pass the party number as the key.
BusinessUnit	The name of the business unit associated with the resource.	It should be a valid existing value.	Required	Not updatable
LegalEntity	The name of the legal entity associated with the resource.	It should be a valid existing value.	Required	Not updatable
ResourcePartyNumber	The public unique identifier (PUID) of the resource party.	This should be unique.	Conditionally required	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Resource Record	Updating an Existing Resource Record
	This is also known as Registry Id.		This is auto-generated. However, you can provide a value to replace the auto-generated value when creating the resource record.	
ResourceEmail	The email address of the resource	The email address must be unique. Specify the email Id when creating the resource.	Required	Pass the party number as the key.
IndividualRoleCode	The code that represents the resource role assigned to the resource.	A resource can have only one individual role code assigned for a given date range. You define and review resource role types and codes using the Manage Resource Roles task.	Conditionally required A value is required when creating a standalone resource.	Pass the party number as the key.
`Username`	The user account name of the resource used to login to the application.	The user name has to be unique.	Optional	Not Updatable
ResourceOrgRoleCode	The code indicating the role of the resource in association with organization membership. For example, SALES_ REPRESENTATIVE, SALES_ MANAGER, and so on.	One organization membership role is allowed for a given date range.	Conditionally required A value is required when creating a resource as a part of the resource hierarchy.	Pass the party number as the key.
RawWorkPhoneNumber	The work phone number of the resource	No validation	Optional	Optional
WorkPhoneCountryCode	The work phone country code of the resource	Enter a value when you specify the RawWorkPhoneNumber. **Note:** When providing a value for the RawWorkPhoneNumber, ensure that you also provide a value for the WorkPhoneCountryCode. If you don't enter a valid WorkPhoneCountryCode, the format of the RawWorkPhoneNumber will be inaccurate.	Conditionally required A value is required when you provide the RawWorkPhoneNumber.	Conditionally required A value is required when you provide the RawWorkPhoneNumber.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Resource Record	Updating an Existing Resource Record
RawMobilePhoneNumber	The mobile phone number of the resource	No validation	Optional	Optional
MobilePhoneCountryCode	The mobile phone country code of the resource	Enter a value when you specify the RawMobilePhoneNumber.	Conditionally required A value is required when you provide the RawMobilePhoneNumber.	Conditionally required A value is required when you provide the RawMobilePhoneNumber.
RawFaxNumber	The fax number of the resource	No validation	Optional	Optional
FaxCountryCode	The fax country code of the resource	Enter a value when you specify the RawFaxNumber.	Conditionally required A value is required when you provide the RawFaxNumber.	Conditionally required A value is required when you provide the RawFaxNumber.

You can view the resource object 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 following role codes are now available in Import Management.

- ResourceOrgRoleCode - Specifies the role that the resource plays as part of the hierarchy in the organization.
- IndividualRoleCode - Specifies the role assigned to the individual resources. You can also assign additional roles to the resource in the hierarchy to provide additional privileges to the resource.

You should not use a Resource Users import in Import Management or REST on an environment with full blown HCM Services implementation. In such cases, Import Management or REST must be used only to convert existing HR workers as resources. This is because, Resource Users REST API only supports vary basic attributes of the HR person/worker. It doesn't support Oracle Human Capital Management (HCM) custom attributes defined on HR Person/Worker.

Note:

- To identify a party number for a resource, you may use File Export, Resource User REST, or resource directory user interface.

  For more information about exporting data, see the topic "Export Data" in the "Related Topics" section.
- In File-based Data Import, resource can be imported to load (create/update) HR workers (Employees and Contingent Workers) without any resource related attributes. However, this isn't possible in Import Management.
- You can't create a standalone worker using this feature. To create a standalone worker, use the HCM Data Loader. For more information about creating a standalone worker, see the Oracle Global Human Resources Cloud Getting Started with Your HR Implementation guide.
- You can speed up import of up to 5,000 records at a time by using Microsoft Excel macros provided by Oracle. The macros validate your data entries, provide lists of values, and automatically populate constant values. After you enter your data, click a button in the macro to import data. Download the Excel macros from the Oracle Sales: Getting Started with Your Sales Implementation: Import Macros (Document ID 2229503.1) article on My Oracle Support.
- Loading of only worker attributes isn't supported.
- Resource Team memberships aren't supported.
- Automatic re-parenting of the child organizations or direct employees when a manager leaves the resource organization isn't supported.
- Move all reporting resources and child organizations to a different organization, when the organization membership of the current manager is ended either due to the movement of the manager to a different organization or the termination of the manager.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

You must run the following scheduled processes after creating or updating a resource:

1. Reporting Hierarchy Generation: This job updates the reporting hierarchy in accordance with the changes in internal resource hierarchy. The resource's reporting manager isn't updated unless you run this scheduled process. Run this scheduled process after you make any changes to the hierarchy such as changing the manager or the organization.

   For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.
2. Update Person Search Keywords: The After Batch Load parameter should be set to Y before you run the update person search keywords schedule process. If you run this scheduled process, you can search the person in the Manage Users UI. The application searches for keyword values in these attributes of a person's records such as person name, user name, primary email, primary phone, work location, and so on. Run this scheduled process when you create a new resource.

For more information about updating person search keywords, see the section "How You Update Person Search Keywords" in the `Oracle Talent Management Cloud Implementing Talent Management Base` guide.

3. Send Pending LDAP Requests: This job processes the pending LDAP requests to provision the user accounts and roles. You can specify the parameters User Type and Batch Size with this job. You must specify User Type (usually select All); if you leave it as blank, then this process won't process any requests. If you don't set Batch Size, the default will be A for automatic, which is 1/10th of the total requests number. You can specify a number for batch size to instruct the process to group that number of requests together for single batch process. If you want the process to pick up the FAULTED requests from previous run, you can set Batch Size as AF. Run this scheduled process when you create a new resource along with the user account.
4. Synchronize User GUID: This job synchronizes the user GUID of users including employees and contingent workers.

   For more information about the **Synchronize User GUID** scheduled process, see the section "Synchronize User GUID" in the `Understanding Scheduled Processes` guide.

Related Topics

- How do I export data?
- How do I import data?
- Schedule the Send Pending LDAP Requests Process
- How do I generate the resource reporting hierarchy?
- How do I synchronize the GUID of users?

How do I create a standalone resource?

You can import resource data from an external data source into Sales and Fusion Service using Import Management. You must create or import resources before you can associate them with resource organizations.

Before You Begin

The scenario in this example assumes that the following prerequisites have already been set up.

1. Employees must exist in the application.
2. User accounts and email IDs are set up for the already existing employees.
3. Appropriate business units are set up using the Manage Business Unit task.

   To find the business unit, navigate to the following in the Setup and Maintenance work area:

   - Offering: Sales
   - Function Area: Data Import and Export
   - Task: Manage Business Units
4. Appropriate legal entities are set up using the Manage Legal Entities task.

   To find the legal entity, navigate to the following in the Setup and Maintenance work area:

   - Offering: Sales
   - Function Area: Data Import and Export

- Task: Manage Legal Entities

Scenario

In this scenario, Lina John is created as a SALES_REPRESENTATIVE. You must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
FirstName	Lina
LastName	John
UserName	LINA.JOHN@VISION.COM
ResourceEmail	lina.john@vision.com
BusinessUnit	Vision Corporation Enterprise
LegalEntity	Vision Corporation
IndividualRoleCode	SALES_REPRESENTATIVE

Note: To create a Sales Manager, specify SALES_MANAGER for the Individual Role Code attribute.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. Navigate to **Resource Directory** and search for Lina in the Search section.

Related Topics

- How do I import resource data?
- How do I import data?
- Schedule the Send Pending LDAP Requests Process

Example of Creating a Sales Representative in a Resource Organization

You can use import management to create resources as a sales representative and add them to the resource hierarchy. You need to specify additional information such ResourceManagerEmail or ResourceParentOrganizationName to create a sales representative as a standalone resource.

Before You Begin

The scenario in this example assumes that the following prerequisites have already been set up.

1. Appropriate business units are set up using the Manage Business Unit task.
2. Appropriate legal entities are set up using the Manage Legal Entity task.
3. Email Ids and user names should be unique.

Scenario

In this scenario, Bob Frank is created as a resource with the role SALES_REPRESENTATIVE. You must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
FirstName	Bob
LastName	Frank
UserName	BOB.FRANK@VISION.COM
ResourceEmail	bob.frank@vision.com
BusinessUnit	Vision Corporation Enterprise
LegalEntity	Vision Corporation
ResourceOrgRoleCode	SALES_REPRESENTATIVE
ResourceManagerEmail	charlotte.edwards@vision.com
ResourceParentOrganizationName	Global HQ

> **Note:** Providing the user name is optional. If you don't provide the user name, the application will generate the user name by default. Provide values either for the ResourceManagerEmail or the ResourceParentOrganizationName attribute. If neither of these is provided, then the resource is associated with the root resource organization as parent organization.

When you're creating a new resource user, the CreateUserAccountFlag controls the user account creation for the resource. The default value for CreateUserAccountFlag is Y. If you don't want the user account to be created, then you can set the attribute CreateUserAccountFlag to 'N'.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

To enable or disable notifications for resources, see the section Set Up Event Notifications for Resources in the topic Import Data.

You must run the following scheduled processes after creating the sales representative in the resource organization:

1. Reporting Hierarchy Generation: This job re-generates the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the Understanding Scheduled Processes guide.
2. Send Pending LDAP Requests: This job processes the pending LDAP requests to provision the user accounts and roles. You can specify the parameters User Type and Batch Size with this job. You must specify User Type (usually select All); if you leave it as blank, then this process won't process any requests. If you don't set Batch Size, the default will be A for automatic, which is 1/10th of the total requests number. You can specify a number for batch size to instruct the process to group that number of requests together for single batch process. If you want the process to pick up the FAULTED requests from previous run, you can set Batch Size as AF. Run this scheduled process when you create a new resource along with the user account.
3. Update Person Search Keywords: This job copies the keyword values automatically from the originating records to the PER_KEYWORDS table, where they are indexed to improve search performance.

Related Topics

- How do I import data?

Example of Creating a Sales Manager in an Existing or New Resource Organization

In this example, you create a sales manager using import management and add them to the resource hierarchy. You can create a new organization or use an existing organization which doesn't have a manager.

Before You Begin

The scenario in this example assumes that the following prerequisites have already been set up.

1. User accounts and e-mail IDs should be unique.
2. Appropriate business units are set up using the Manage Business Unit task.
    - To find the business unit, navigate to the following in the Setup and Maintenance work area:
        - Offering: Sales
        - Function Area: Data Import and Export
        - Task: Manage Business Units
3. Appropriate legal entities are set up using the Manage Legal Entities task.
    - To find the legal entity, navigate to the following in the Setup and Maintenance work area:
        - Offering: Sales
        - Function Area: Data Import and Export
        - Task: Manage Legal Entities

Scenario

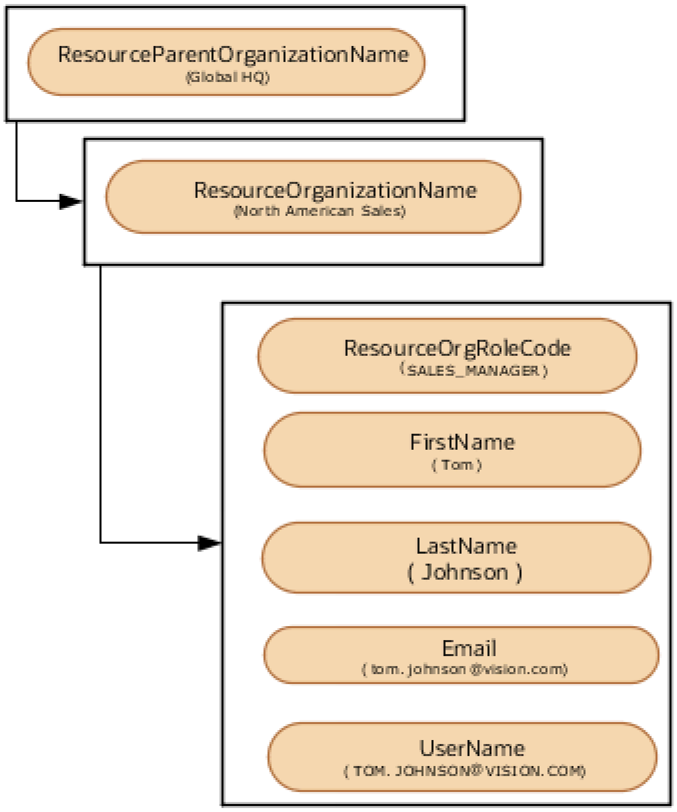
In this scenario, you create Tom Johnson as a manager of the resource organization North American Sales in the resource parent organization Global HQ. He is created as a resource with the role of SALES_MANAGER. You must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
FirstName	Tom
LastName	Johnson
UserName	TOM.JOHNSON@VISION.COM
Email	tom.johnson@vision.com
BusinessUnit	Vision Corporation Enterprise
LegalEntity	Vision Corporation

Attribute Name	Value
ResourceOrgRoleCode	SALES_MANAGER
ResourceParentOrganizationName	Global HQ
ResourceOrganizationName	North American Sales

Note: Providing the user name is optional. If you don't provide the user name, the application will generate the user name by default. Provide values either for the ResourceManagerEmail or the ResourceParentOrganizationName attribute. If neither of these is provided, then the resource is associated with the root resource organization as parent organization.

The following figure shows the resource Tom Johnson created as a sales manager in the hierarchy.



To create a top resource in an existing resource organization, you must use the TopResourceFlag attribute in import management and REST services. This attribute indicates that the resource is a top resource, and is used by the Sales Setup Assistant.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

> **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You must run the following scheduled processes after creating the sales manager:

1. Reporting Hierarchy Generation: This job re-generates the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process see the section "Reporting Hierarchy Generation" in the Understanding Scheduled Processes guide.
2. Send Pending LDAP Requests: This job processes the pending LDAP requests to provision the user accounts and roles. You can specify the parameters User Type and Batch Size with this job. You must specify User Type (usually select All); if you leave it as blank, then this process won't process any requests. If you don't set Batch Size, the default will be A for automatic, which is 1/10th of the total requests number. You can specify a number for batch size to instruct the process to group that number of requests together for single batch process. If you want the process to pick up the FAULTED requests from previous run, you can set Batch Size as AF. Run this scheduled process when you create a new resource along with the user account.

Examples of Adding a Resource to Existing Employees

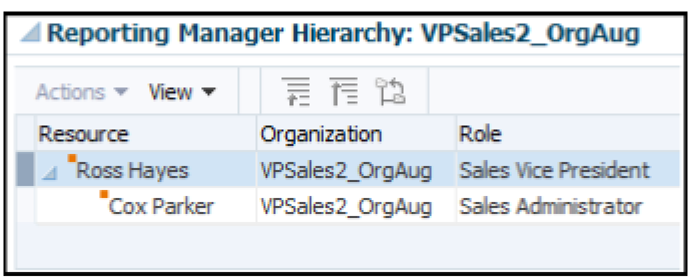
You can add a resource to existing employees using import management. You can identify specific employees or contingent workers in Oracle Human Capital Management (HCM) as resources in Sales and Fusion Service.

You can specify details about a resource using the Resource target import object. This target object saves information about a resource and allows import of the resource's information, such as resource organization membership and user account details. After you have identified these new resources, you can assign them to organizations and teams, as needed.

Scenario

Tory Griffiet is an employee in Oracle Human Capital Management (HCM) and doesn't have any associated resource information.

In this scenario, Troy Griffiet who's an employee in Oracle Human Capital Management (HCM) is identified to be a resource in Sales and Fusion Service. Troy is converted to a SALES_REPRESENTATIVE under Ross Hayes. The reporting hierarchy and organization details of Ross Hayes before Troy Griffiet is moved under him are as shown in this image:



To identify Troy as a resource in Sales and Fusion Service, you must create a source file (CSV) file with the attributes and import it using import management as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceOrgRoleCode	SALES_REPRESENTATIVE
ResourceParentOrganizationName	VPSales2_OrgAug

> **Note:** The ResourceOrganizationName attribute is ignored for non-managerial resource.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

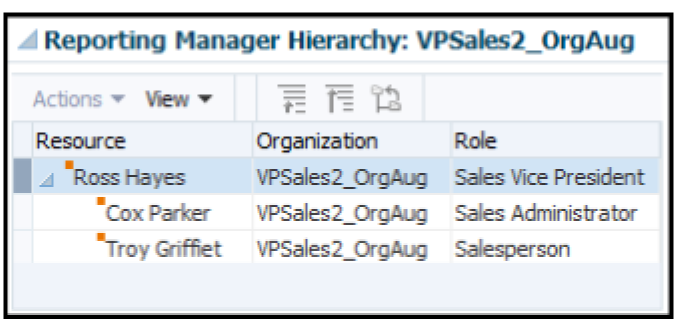
   > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

Tory Griffiet is now converted from an employee in HCM to a resource in Sales and Fusion Service and all the resource information is populated.

The reporting hierarchy and organization details of Ross Hayes after Troy has been moved under him are shown in this image:



Scenario

You can convert an employee to a manager resource and add that employee to the hierarchy. You must create a source CSV file with the attributes and import it using file-based import, as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceOrgRoleCode	SALES_MANAGER
ResourceOrganizationName	JSmithOrg
ResourceParentOrganizationName	Global HQ

Scenario

You can convert a resource without adding it to the hierarchy. You must create a source CSV file with the attributes and import it using file-based import, as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
IndividualRoleCode	SALES_REPRESENTATIVE

Examples of Changing a Resource from Manager to a Non-Manager Role

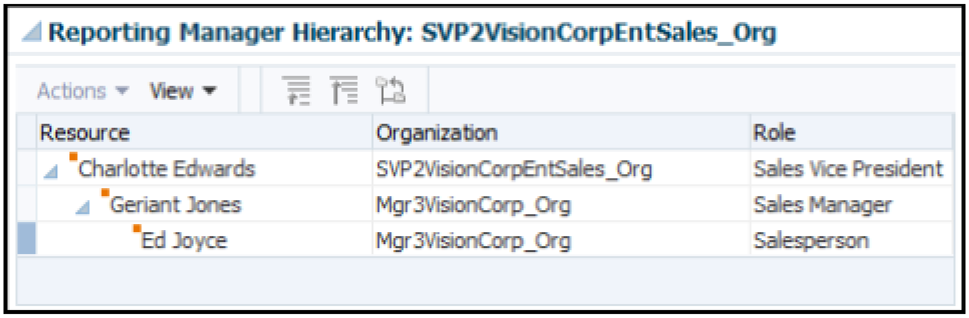
You can make role-change related updates to a resource by changing the resource information such as resource role code and resource role type code. Before you change a manager to a non-manager role, move the employees reporting to this manager to a different manager.

These scenarios illustrate the various role-change related updates you can make to a resource.

- Sales Manager changed to Sales Representative under the same manager.
- Sales Manager changed to Sales Representative under a different manager.

Sales Manager Changed to Sales Representative under the Same Manager

Geriant Jones is a Sales Manager reporting to Charlotte Edwards. The reporting hierarchy and organization details of Geriant Jones are as shown in this image:



In this scenario, Geriant's role is changed to Sales Representative under Charlotte Edwards, without any change in the reporting hierarchy. Move employees reporting to Geriant Jones to Geriant Jones' parent organization. In this example, move Ed Joyce under Charlotte Edwards as salesperson before demoting Geriant Jones.

To change Geriant Jones' role to Sales Representative, you must create a source file (CSV) with the attributes listed in this table and import it using import management. You can use either ResourceParentOrganizationName or ResourceManagerEmail for Organization or Manager-related changes.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceManagerEmail	charlotte.edwards@vision.com
ResourceOrgRoleCode	SALES_REPRESENTATIVE
ResourceParentOrganizationName	SVP2VisionCorpEntSales_Org

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After your import runs successfully, send the pending LDAP user update requests:

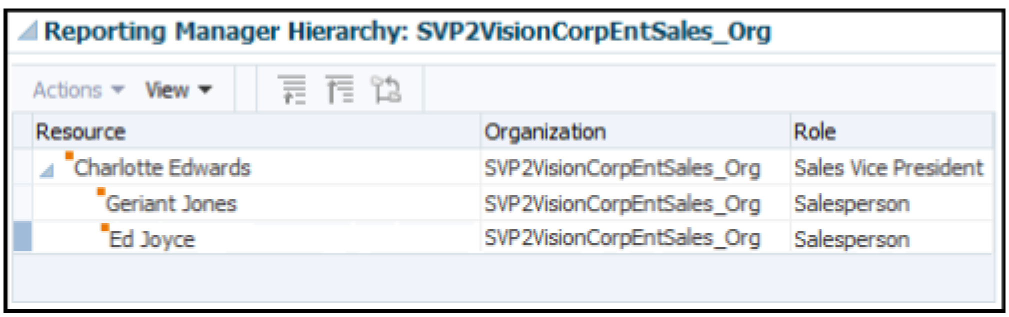
1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.

3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

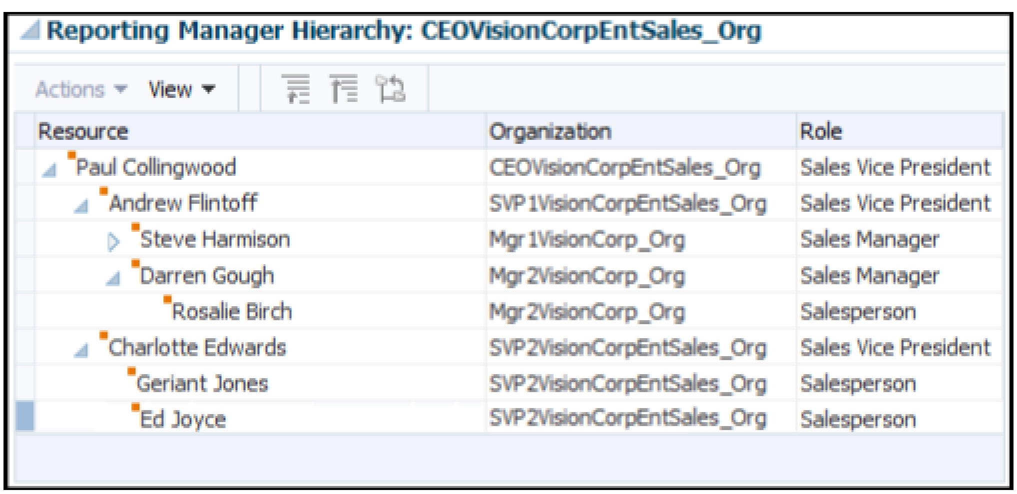
The reporting hierarchy and organization details of Geriant Jones after his role has been changed from SALES_MANAGER to SALES_REPRESENTATIVE are as follows:

> **Note:** The sales representatives reporting to the manager being demoted should be moved under their manager's manager or another manager. In this scenario, Ed Joyce who was reporting to Geriant should be moved under Charlotte Edwards who was Edward's manager, as shown in this image.



Sales Manager Changed to Sales Representative under a Different Manager

Darren Gough is a Sales Manager reporting to Andrew Flintoff. The reporting hierarchy and organization details of Darren Gough are as shown in this image:



In this scenario, Darren's role is changed to a Sales Representative and would be reporting to Charlotte Edwards, a different manager. To change role of Darren Gough from Sales Manager to Sales Representative under Charlotte

Edwards, you must create a source file (CSV) with the attributes listed in the following table and import it using import management. You can use either ResourceParentOrganizationName or ResourceManagerEmail for Organization or Manager-related changes.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceOrgManagerEmail	charlotte.edwards@vision.com
ResourceOrgRoleCode	SALES_REPRESENTATIVE
ResourceParentOrganizationName	SVP2VisionCorpEntSales_Org

You can import the source data file

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

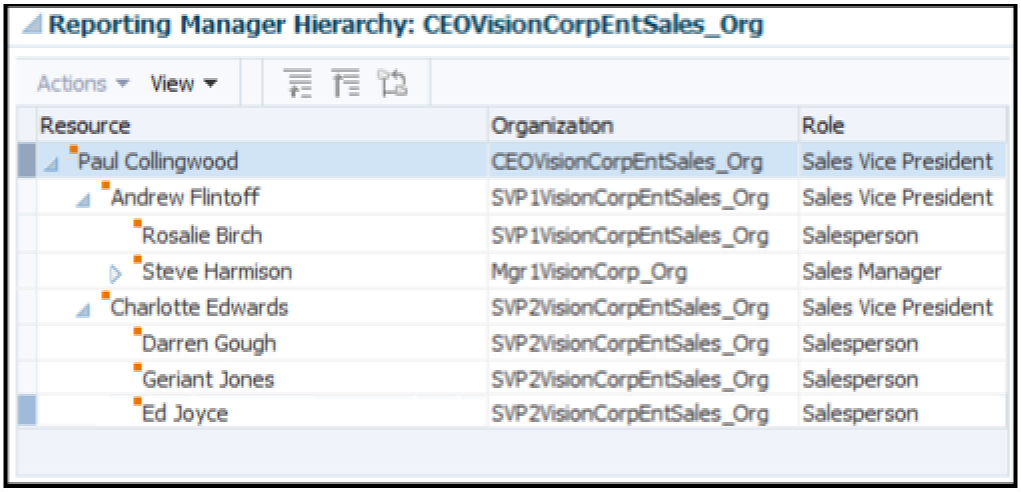
After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

> **Note:** Before demoting the manager, the sales representatives reporting to the manager being demoted should be moved under their manager's manager or another manager. In this scenario, before Darren's demotion to a different manager, Rosalie Birch who was reporting to Darren should be moved under Andrew Flintoff who was Darren's manager as shown in this image.

The reporting hierarchy and organization details of Darren Gough after his role has been changed from SALES_MANAGER to SALES_REPRESENTATIVE under Charlotte Edwards are as follows:



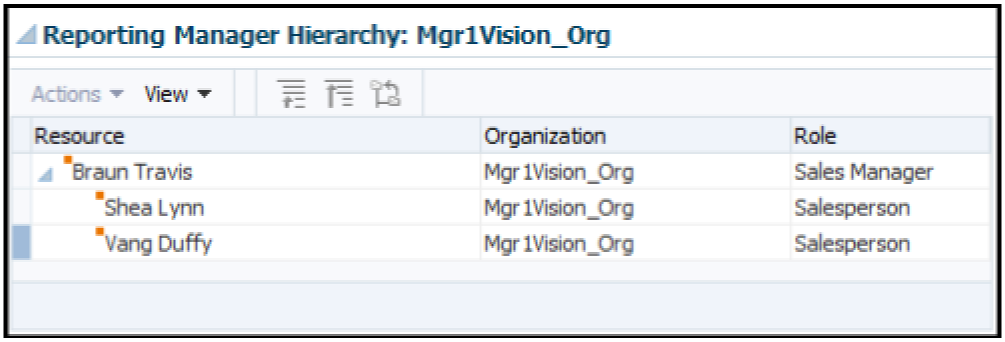
Examples of Changing a Resource from Non-Manager to a Manager Role

You can make role-change related updates to a resource by changing the resource information such as resource role code and resource role type code. The scenarios herein illustrate the different role-change related updates you can make to a resource.

- Sales Representative role changed to Sales Manager under the same manager
- Sales Representative role changed to Sales Manager under a different manager

Sales Representative Role Changed to Sales Manager under the Same Manager

Shea Lynn is a Sales Representative reporting to Braun Travis. The reporting hierarchy and organization details of Shea Lynn are as shown in this image:



In this scenario, Shea's role is changed to a Sales Manager reporting to Braun Travis, without any change in the reporting hierarchy. To change the role of Shea Lynn to Sales Manager, you must create a source file (CSV) with the attributes and import it, as explained in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta504976`
ResourceOrgRoleCode	SALES_MANAGER
ResourceOrganization	Mgr4Vision_Org
ResourceParentOrganizationName	Mgr1Vision_Org

Note: Changes performed via import activity will only reflect the day after the end date. The new assignment starts a day after the end date only.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

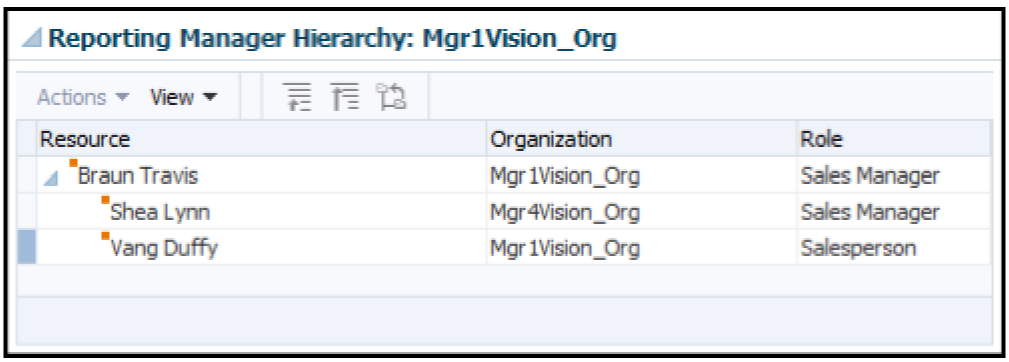
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

After your import runs successfully, send the pending LDAP user update requests:

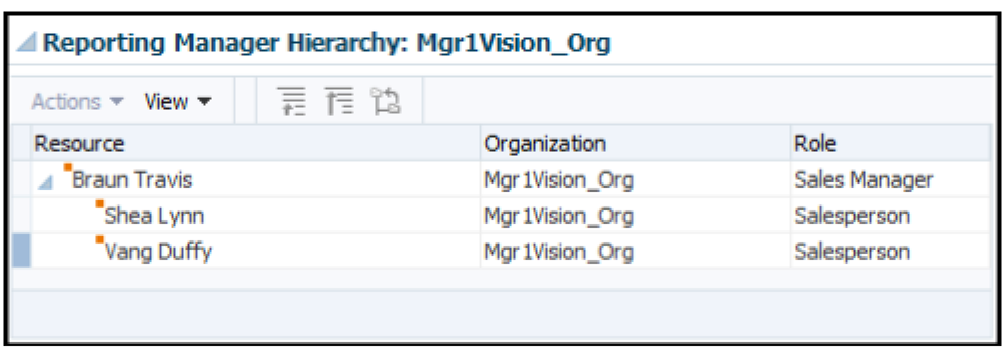
1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

The reporting hierarchy and organization details of Shea Lynn after her role has been changed from SALES_REPRESENTATIVE to SALES_MANAGER as shown in this image:



Sales Representative Role Changed to Sales Manager under a Different Manager

Vang Duffy is a Sales Representative reporting to Braun Travis. The reporting hierarchy and organization details of Vang Duffy are shown in this image:



In this scenario, Vang's role is changed to a Sales Manager and would be reporting to Ewing Yu, a different manager. To change Vang Duffy's role to Sales Manager under Ewing Yu, you must create a source file (CSV) with the following attributes and import it, as explained in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta504976`
ResourceOrgRoleCode	SALES_MANAGER
ResourceOrganization	Mgr4Vision_Org
ResourceParentOrganizationName	Mgr3Vision_Org
ResourceOrgManagerEmail	ewing.yu@vision.com

> **Note:** Changes performed via import activity will only reflect the day after the end date. The new assignment starts a day after the end date only.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

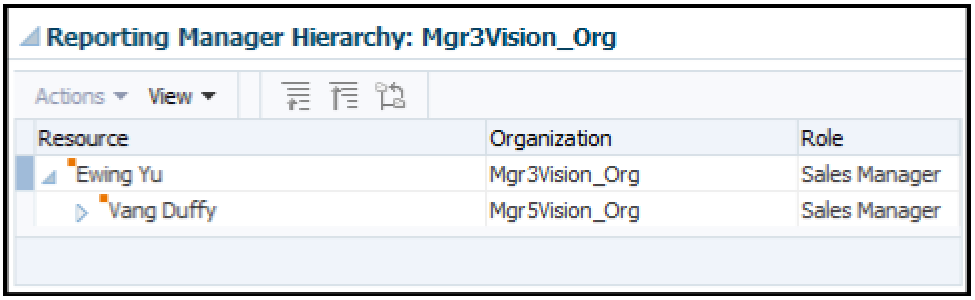
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

The reporting hierarchy and organization details of Vang Duffy after his role has been changed from SALES_REPRESENTATIVE to SALES_MANAGER under Ewing Yu are as follows:



Examples of Disabling or Reenabling User Accounts

You can disable or reenable user accounts using import management. User accounts enable the user to sign in to Sales and Fusion Service.

When you run the resource import to upload users or enter users in the Manage Users UI, users are created in Sales and Fusion Service. User accounts for these users are created and maintained in a Lightweight Directory Access Protocol (LDAP) directory local to CX Sales and Fusion Service by Oracle Identity Management (`OIM`). You can't delete the user account. However, you can disable or suspend the user account when an employee leaves your company. When you disable the user account, it prevents the user from being able to sign in to Sales and Fusion Service. As a result, the user's access to all the associated transaction objects, such as sales territories, leads, opportunities, and so on, are also disabled.

> **Note:** You may want to transfer these transaction objects to another resource user. For information about initiating mass transfer, see the section "Records Transfer Between Users" in the `Implementing Sales` guide.

Disabling the user account doesn't mean the termination of the employee work relationship or end dating of the resource. When an employee's work relationships are terminated and the employee has no roles, the employee's user account is suspended automatically. If the employee is subsequently rehired, the suspended account is automatically re-enabled. When an employee is re-hired, depending on availability, you might get the same user account. For example, an employee Rob Smith has the email Id rob.smith@vision.com before leaving the organization. When he's re-hired, his email Id is rob.x.smith@vision.com.You can enable or disable user accounts using import management.

These scenarios illustrate the various user account related updates you can make to a resource:

- Disabling User Account
- Reenabling User Account

Disable the User Account

Pat Tyme is a Sales Director who's an employee at Vision Corporation Enterprise. To view the user information for Pat:

1. Navigate to the following in the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Manage Users
2. Search for Pat Tyme. The user account status of Pat Tyme appears in the active status.

In this scenario, Pat Tyme has moved to another organization and all the user accounts must be disabled. To disable the user account for Pat Tyme, you must create a source file (CSV) with the attributes listed in this table and import it using import management.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
UserStatus	S

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

    > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

As Pat Tyme's user account has been disabled, he won't be able to sign in to Sales and Fusion Service. However, you can verify if Pat's user account is disabled.

1. Go to **Navigator**, **Tools**, **Import Management**, **Import Queue**.
2. In the Navigator, select **My Team** and **User and Roles**.
3. Search for Pat Tyme.
   The user account status of Pat Tyme appears in the inactive status.

Reenable the User Account

Ellis Gibson is a Sales Representative who's an employee at Vision Corporation Enterprise. To view the user information for Ellis:

1. Go to **Navigator**, **Tools**, **Import Management**, **Import Queue**.
2. Go to **Navigator**, **My Team**, **User and Roles**.
3. Search for Ellis Gibson.
   The user account status of Ellis Gibson appears in the inactive status.

In this scenario, Ellis Gibson has recently joined Vision Corporation Enterprise and he doesn't have a user account. To enable the user account for Ellis Gibson, you must create a source file (CSV) with the attributes listed in this table and import it using import management.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
UserStatus	A

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.

4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK** and **Close**.
7. In the Scheduled Processes page, click the **Refresh** icon.
8. Verify if the status of the process has completed successfully.

As Ellis Gibson's user account has been enabled, he can sign in to Sales and Fusion Service. Alternatively, you can also verify if Ellis Gibson's user account is enabled.

1. Go to **Navigator**, **Tools**, **Import Management**, **Import Queue**.
2. Go to **Navigator**, **My Team**, **User and Roles**.
3. Search for Ellis Gibson.

   The user account status of Ellis appears in the active status.

Related Topics

- How do I export data?

Examples of Making Manager Transfer Related Updates

You can transfer a sales representative or sales manager from the existing manager to a new manager using import management. This new manager might either already exist in the application or be a newly created manager.

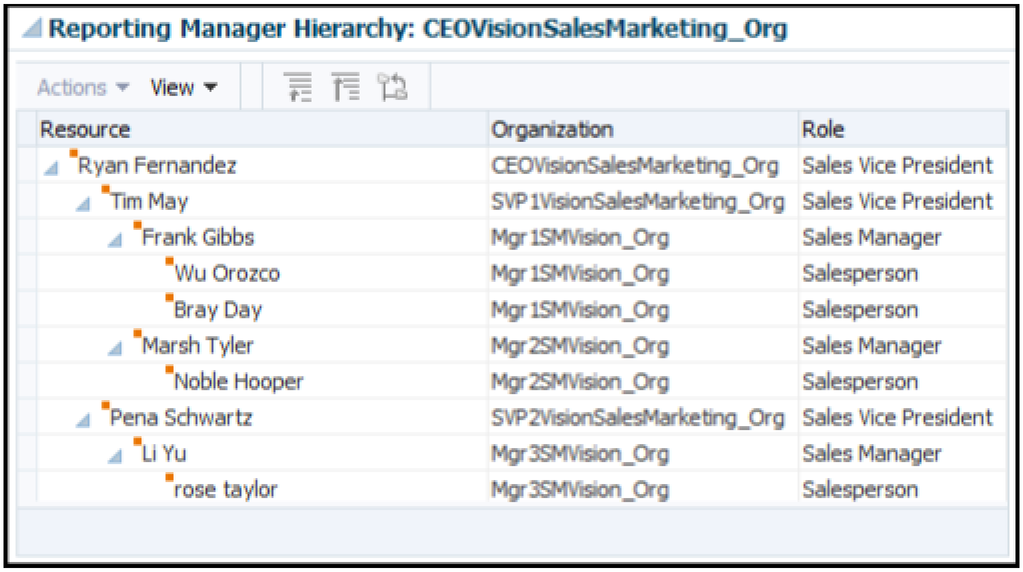
You can transfer the resource by changing the resource information such as manager e-mail address or parent organization name.

The following scenarios illustrate the various manager transfer related updates to a resource.

- Transfer of Sales Representative from the Existing Manager to a Different Manager
- Transfer of Sales Manager from the Existing VP to a Different VP (With the Entire Organization)

Transfer of Sales Representative from the Existing Manager to a Different Manager

Wu Orozco is a Sales Representative reporting to Frank Gibbs. The reporting hierarchy and organization details of Wu Orozco are as shown in this image:



In this scenario, Wu is transferred from Frank Gibbs to a different manager, Li Yu, who's already existing in the application. To transfer Wu Orozco from Frank to Li Yu, you must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765974`
ResourceManagerEmail	li.yu@vision.com
ResourceParentOrganizationName	Mgr3SMVision_Org

You can import the source data file.

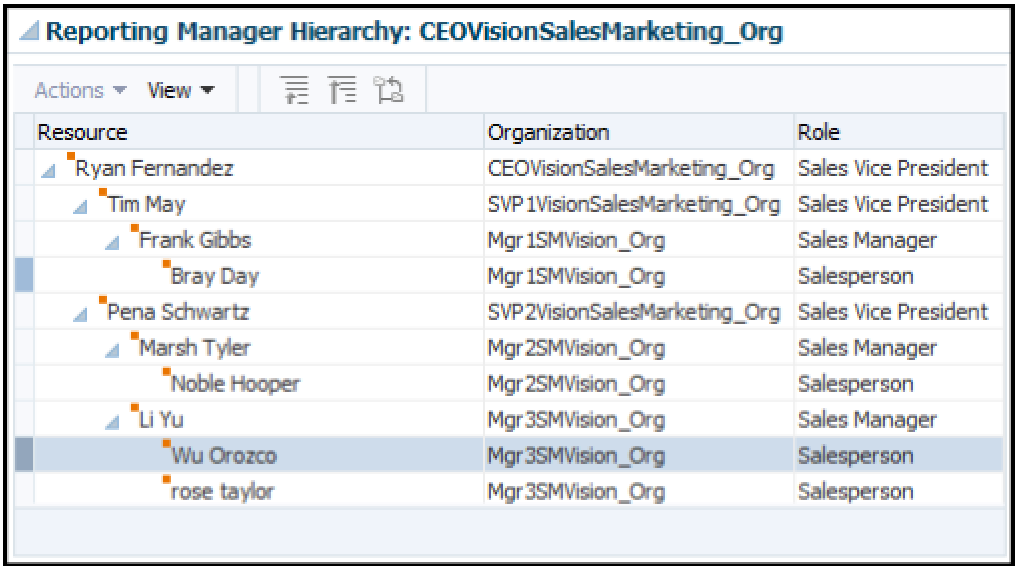
1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

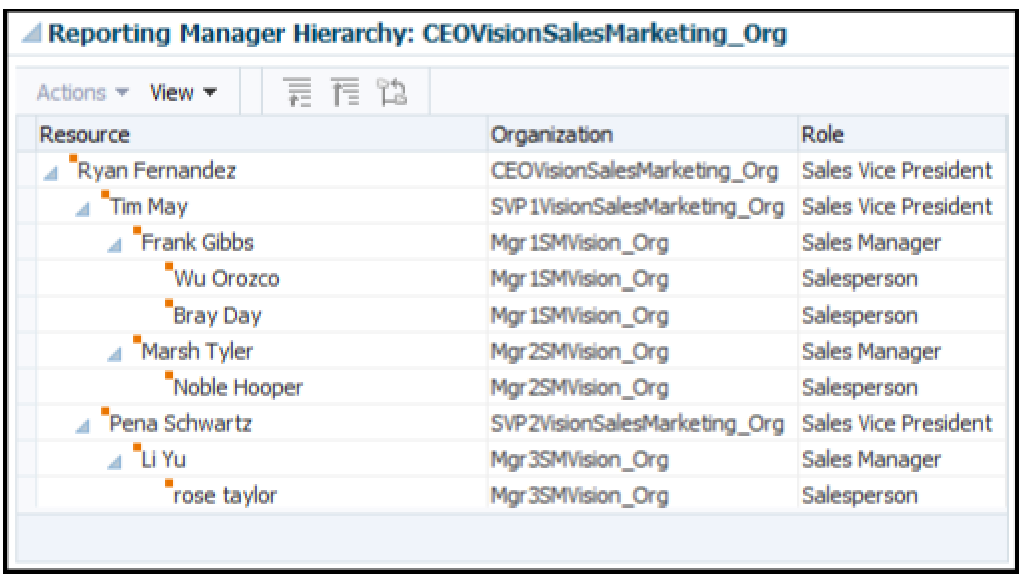
The reporting hierarchy and organization details of Wu Orozco after he has been transferred from Frank Gibbs to Li Yu are as shown in this image:



Resource	Organization	Role
Ryan Fernandez	CEOVisionSalesMarketing_Org	Sales Vice President
Tim May	SVP 1VisionSalesMarketing_Org	Sales Vice President
Frank Gibbs	Mgr 1SMVision_Org	Sales Manager
Bray Day	Mgr 1SMVision_Org	Salesperson
Pena Schwartz	SVP 2VisionSalesMarketing_Org	Sales Vice President
Marsh Tyler	Mgr 2SMVision_Org	Sales Manager
Noble Hooper	Mgr 2SMVision_Org	Salesperson
Li Yu	Mgr 3SMVision_Org	Sales Manager
Wu Orozco	Mgr 3SMVision_Org	Salesperson
rose taylor	Mgr 3SMVision_Org	Salesperson

Transfer of Sales Manager from the Existing VP to a Different VP (With the Entire Organization)

Marsh Tyler is a Sales Manager reporting to Tim May. The reporting hierarchy and organization details of Marsh Tyler are as shown in this image:



Resource	Organization	Role
Ryan Fernandez	CEOVisionSalesMarketing_Org	Sales Vice President
Tim May	SVP 1VisionSalesMarketing_Org	Sales Vice President
Frank Gibbs	Mgr 1SMVision_Org	Sales Manager
Wu Orozco	Mgr 1SMVision_Org	Salesperson
Bray Day	Mgr 1SMVision_Org	Salesperson
Marsh Tyler	Mgr 2SMVision_Org	Sales Manager
Noble Hooper	Mgr 2SMVision_Org	Salesperson
Pena Schwartz	SVP 2VisionSalesMarketing_Org	Sales Vice President
Li Yu	Mgr 3SMVision_Org	Sales Manager
rose taylor	Mgr 3SMVision_Org	Salesperson

In this scenario, Marsh Tyler is a sales manager and is transferred with his entire organization from Tim May to Pena Schwartz. Pena Schwartz is another vice-president already existing in the application. When Marsh Tyler is transferred, by default, his entire organization moves with him. Therefore, Noble Hooper who reports to Marsh Tyler is also moved along with Marsh. To transfer Marsh from Tim May to Pena Schwartz, you must create a source file (CSV) with the attributes and import it using import management as shown in this table. Provide a value either for the ResourceOrgManagerEmail or the ResourceParentOrganizationName attribute.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceOrgManagerEmail	pena.schwartz@vision.com
ResourceParentOrganizationName	SVP2VisionSalesMarketing_Org

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

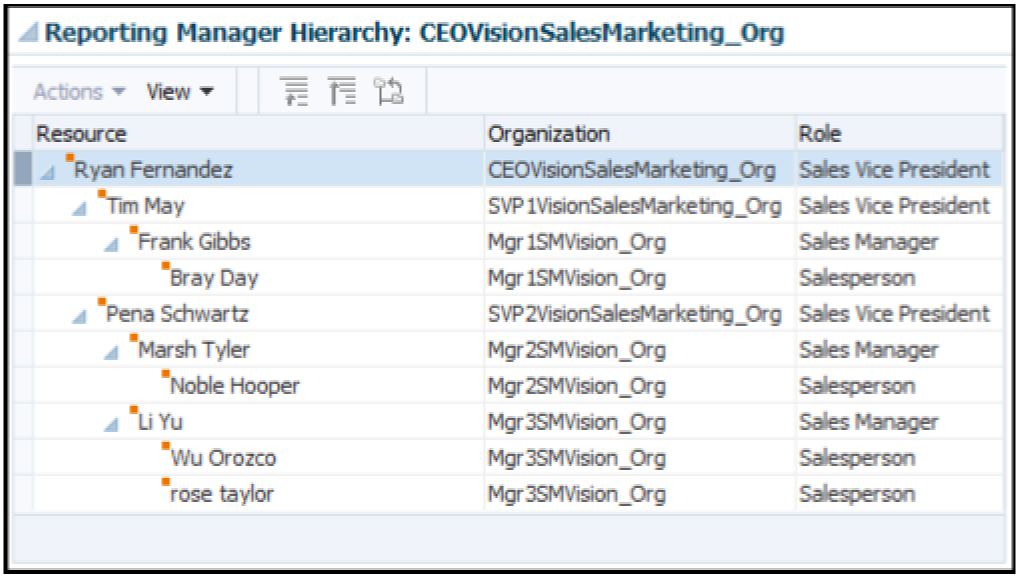
    Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

The reporting hierarchy and organization details of Marsh Tyler after he has been transferred from Tim May to Pena Schwartz are as follows:

Note: The sales representatives reporting to the manager being transferred are moved along with the manager. In this scenario, Noble Hooper who reports to Marsh Tyler is transferred along with Marsh from Tim May to Pena Schwartz as shown in this image.



Reporting Manager Hierarchy: CEOVisionSalesMarketing_Org

Resource	Organization	Role
Ryan Fernandez	CEOVisionSalesMarketing_Org	Sales Vice President
Tim May	SVP1VisionSalesMarketing_Org	Sales Vice President
Frank Gibbs	Mgr1SMVision_Org	Sales Manager
Bray Day	Mgr1SMVision_Org	Salesperson
Pena Schwartz	SVP2VisionSalesMarketing_Org	Sales Vice President
Marsh Tyler	Mgr2SMVision_Org	Sales Manager
Noble Hooper	Mgr2SMVision_Org	Salesperson
Li Yu	Mgr3SMVision_Org	Sales Manager
Wu Orozco	Mgr3SMVision_Org	Salesperson
rose taylor	Mgr3SMVision_Org	Salesperson

Examples of Making Resource Role Related Updates

You can make resource role related updates to a resource by changing the resource information such as resource role code.

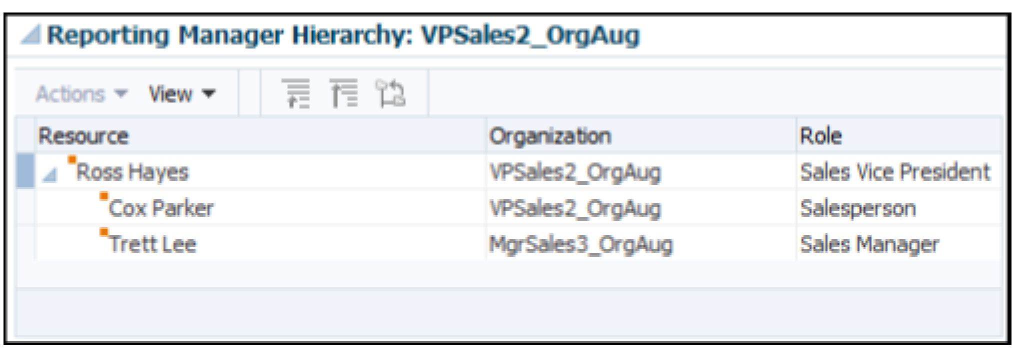
The following scenarios illustrate the various resource role related updates you can make to a resource.

- The resource is part of the hierarchy.
- The resource isn't part of the hierarchy.

You can also add a standalone (non-manager or manager) resource to a hierarchy.

Resource is a part of the Hierarchy

Cox Parker is a Sales Representative reporting to Ross Hayes. The reporting hierarchy, organization, and role details of Cox Parker are displayed as shown in this image:



Reporting Manager Hierarchy: VPSales2_OrgAug

Resource	Organization	Role
Ross Hayes	VPSales2_OrgAug	Sales Vice President
Cox Parker	VPSales2_OrgAug	Salesperson
Trett Lee	MgrSales3_OrgAug	Sales Manager

In this scenario, Cox's role is changed from Sales Representative to Sales Administrator within the same organization. To change the role of Cox Parker to Sales Administrator, you must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta504976`
ResourceOrgRoleCode	SALES_ADMINISTRATOR

> **Note:** You can obtain the ResourcePartyNumber either from the Resource Directory or through Data Export. For information about obtaining the ResourcePartyNumber either from the Resource Directory or through Data Export, see the topic "Obtaining the ResourcePartyNumber for a Resource".

> **Note:** If you specify a value for the ResourceOrgRoleCode attribute, you don't need to specify a value for the IndividualRoleCode attribute.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

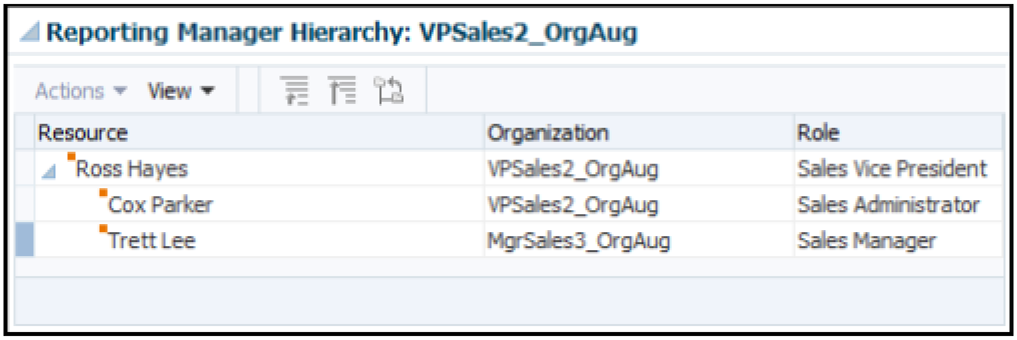
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

The details of Cox Parker after the role change update from SALES_REPRESENTATIVE to SALES_ADMINISTRATOR are displayed as shown in this image:



Employee Resource isn't part of the Hierarchy

Pat Tyme is a Sales Manager who's not part of the hierarchy.

In this scenario, Pat's role is changed from Sales Manager to Sales Director. To change Pat's role to Sales Director, you must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
IndividualRoleCode	SALES_DIRECTOR

Note: This scenario assumes that the user is assigned one IndividualRoleCode.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.

6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

Adding a Standalone Resource to a Hierarchy

You can add a standalone resource (non-manager or manager) to a hierarchy. To add a resource to the hierarchy, you must create a source CSV file with the attributes and import it using import management, as shown in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceOrgManagerEmail	charlotte.edwards@vision.com
ResourceParentOrganizationName	Global HQ
ResourceOrganizationName	JsmithOrg (Optional)

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process see the section "Reporting Hierarchy Generation" in the Understanding Scheduled Processes guide.

> **Note:** Provide values for the ResourcePartyNumber, ResourceOrgManagerEmail, and ResourceParentOrganizationName attributes when adding a non-manager resource to the hierarchy. Optionally, provide a value for the ResourceOrganizationName attribute when adding a manager resource to the hierarchy

Examples of Making Resource End-Dating Related Updates

You can end-date a resource when a worker leaves your enterprise, using import management. This example illustrates what happens when you end date a Sales Representative and a Sales Manager.

When a worker leaves your enterprise, you terminate them. When you terminate a worker, the person type of the worker record changes to ex-employee or ex-contingent worker and the associated resource usage is end-dated. However, the records of the ex-employee or ex-contingent worker remain in the database and you can reinstate or rehire the ex-employee or ex-contingent worker later to create a new period of service. You can also end date a resource, if you want to end all the assignments that are associated with the resource.

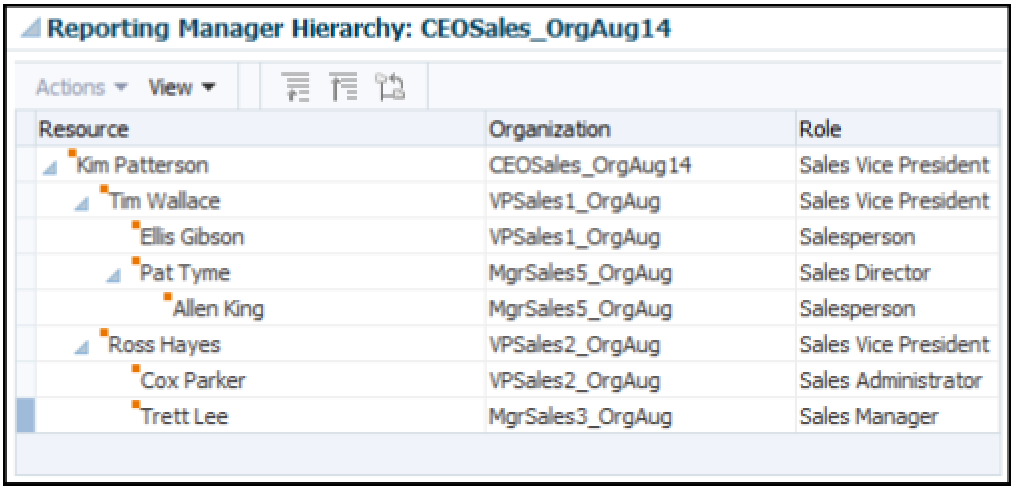
> **Note:** You may want to transfer the transaction objects related to end-dated resources to another resource.

These scenarios illustrate the various end-dating changes you can make to a resource.

- End-dating a Sales Representative
- End-dating a Sales Manager

End-Dating a Sales Representative

Allen King is a Sales Representative reporting to Pat Tyme. The reporting hierarchy and organization details of Allen King are displayed in this image:



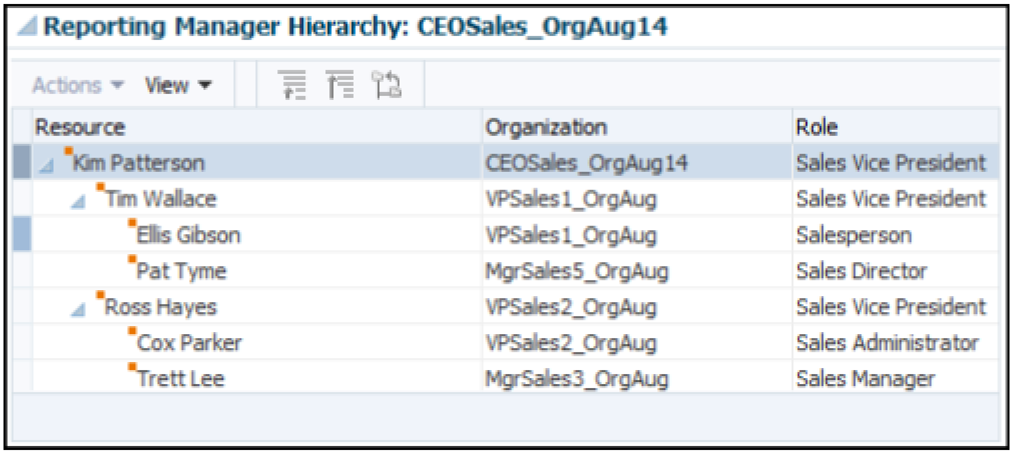
In this scenario, Allen King resigns from Vision Corporation and his resource assignment is end-dated. To end-date Allen, you must create and import a source file (CSV) with the attributes listed in this table using import management.

> **Note:** When Allen King is end-dated, all the transaction objects owned by him, such as sales territories, leads, opportunities, and so on, may need to be manually transferred to his manager or another resource.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceEndDate	6/12/2020

You can import the source data file from the Import Management work area. Then, create mappings between the attributes in your source data file and the attributes in Sales and Fusion Service using the values given in the table.

The reporting hierarchy and organization details after Allen King is removed from Pat Tyme's organization are displayed in this image:

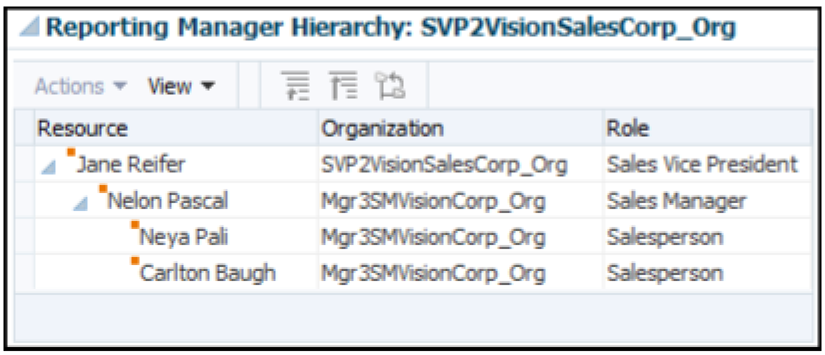


Reporting Manager Hierarchy: CEOSales_OrgAug14

Resource	Organization	Role
Kim Patterson	CEOSales_OrgAug14	Sales Vice President
Tim Wallace	VPSales1_OrgAug	Sales Vice President
Ellis Gibson	VPSales1_OrgAug	Salesperson
Pat Tyme	MgrSales5_OrgAug	Sales Director
Ross Hayes	VPSales2_OrgAug	Sales Vice President
Cox Parker	VPSales2_OrgAug	Sales Administrator
Trett Lee	MgrSales3_OrgAug	Sales Manager

End-Dating a Sales Manager

Nelon Pascal is a Sales Manager reporting to Jane Reifer. The reporting hierarchy and organization details of Nelon Pascal are displayed in this image:



Reporting Manager Hierarchy: SVP2VisionSalesCorp_Org

Resource	Organization	Role
Jane Reifer	SVP2VisionSalesCorp_Org	Sales Vice President
Nelon Pascal	Mgr3SMVisionCorp_Org	Sales Manager
Neya Pali	Mgr3SMVisionCorp_Org	Salesperson
Carlton Baugh	Mgr3SMVisionCorp_Org	Salesperson

In this scenario, Nelon Pascal is a sales manager who has two sales representatives, Neya Pali and Carlton Baugh, reporting to him. Nelon Pascal resigns from Vision Corporation and his resource assignment is end-dated. If the salespeople in the resource organization have any transactions assigned to them, then these are available once another manager assumes the vacant resource organization membership as manager. Before Nelon's resource assignment is end dated, Oracle recommends that you move his reports to a different manager such as Nelon's manager, Jane Reifer. However, if you want to move Nelon's reports to another manager, then you must provide additional rows in your source file (CSV) for the reports and specify all the mandatory attributes. To end date Nelon Pascal, you must create a source file (CSV) with the attributes and import it using import management as listed in this table.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceEndDate	12/10/2020

You can import the source data file from the Import Management work area.

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

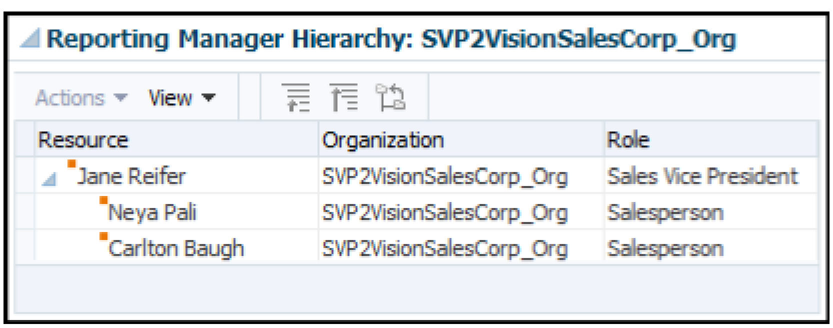
After your import runs successfully, send the pending LDAP user update requests:

1. In the Navigator, click **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, from the **Name** drop-down list, search for Send Pending LDAP Requests.
4. From the search results, select **Send Pending LDAP Requests** and click **OK**.
5. In the Process Details dialog box, click **Submit**.
6. In the Confirmation dialog box, click **OK**.
7. Click **Close**.
8. In the Scheduled Processes page, click the **Refresh** icon.
9. Verify if the status of the process has completed successfully.

Note: Before you run the Send Pending LDAP Requests schedule process, you need to run the "Autoprovision Roles for All Users" schedule process with 'Process Generated Role Requests' parameter to NO to avoid performance issues.

You run the scheduled process **Reporting Hierarchy Generation** to re-generate the resource reporting hierarchy when there is a change in the organization hierarchy. For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the `Understanding Scheduled Processes` guide.

The reporting hierarchy and organization details after Nelon Pascal is removed from Jane Reifer's organization are as shown in this image.



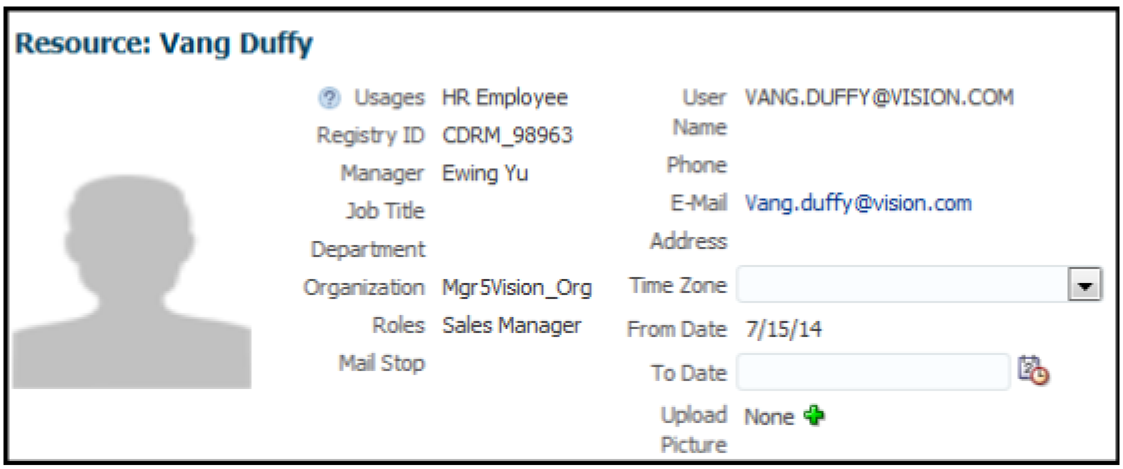
How do I update employee information using import management?

You can update a resource by changing the resource information such as first name, last name, and email address. You can also update a resource with additional information such as fax number, phone number, middle name, and so on.

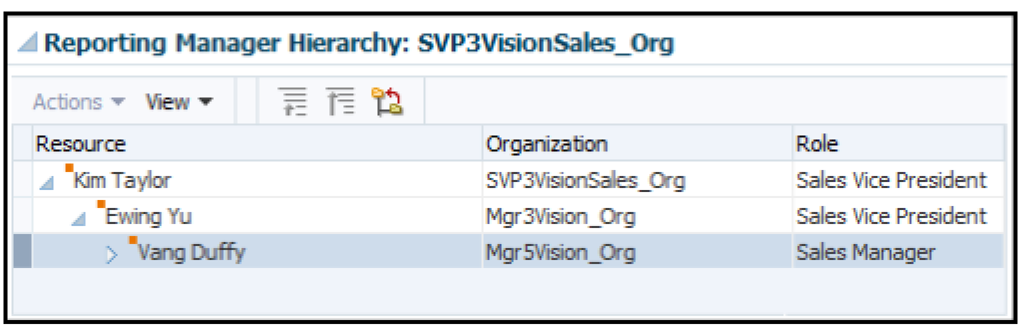
Note: End dated resources can't be updated using import or REST.

How to update the last name of a resource?

Vang Duffy is a Sales Manager in Sales and Fusion Service. You can view the resource details of Vang Duffy from the Resource Directory. From the Navigator, click **Resource Directory** and search for Vang Duffy in the Search section, his resource details appears as shown in this image.



The reporting hierarchy and organization details of Vang Duffy are as follows:



In this scenario, Vang Duffy changes his name to Vang Smith. To update Vang's last name, you must use the Resource Party Number and Last Name attributes in your source file. To update Vang's last name from Duffy to Smith, create a source file (CSV) with these attributes and import it using import management.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
LastName	Smith

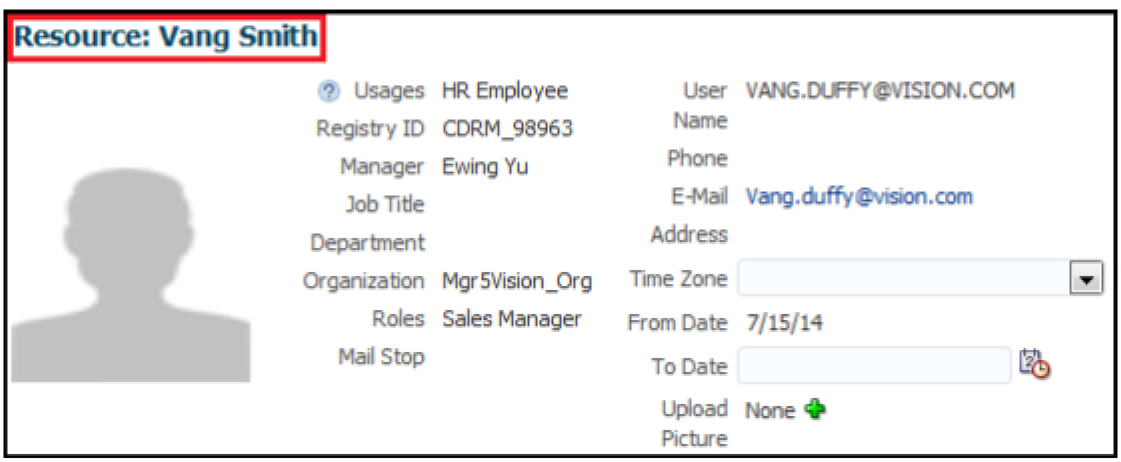
You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

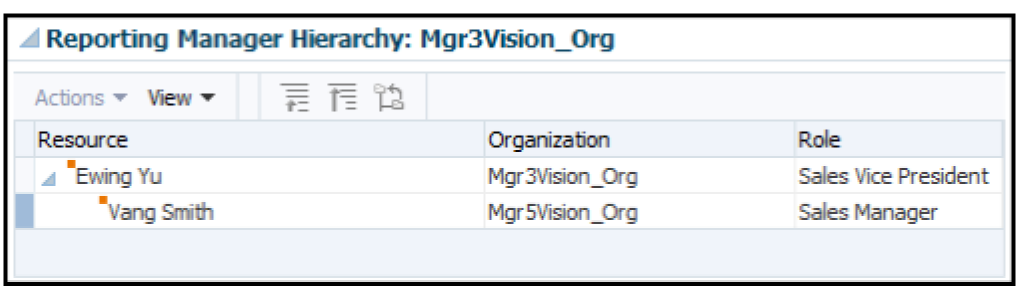
   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After running the import file, navigate to Resource Directory and search for Vang in the Search section. The resource details of Vang after the last name is updated appear as shown in this image:



Also, note that Vang's last name is updated in the reporting hierarchy.



How to update the email address of a resource?

Rina Nash is a Sales Representative in Sales and Fusion Service. You can view the resource details of Rina Nash from the Resource Directory. From the Navigator, click Resource Directory and search for Rina Nash in the Search section. Rina's resource details are displayed.

In this scenario, Rina Nash changes her name to Rina Pinto Jacob after marriage. Rina not only wants to change her last name, but also wants to update her email ID and middle name.

To update Rina's last name, email address, and middle name, you must create a source file (CSV) with these attributes and import it using import management. However, in this scenario, to update Rina's email ID, you must provide the email address in your CSV file.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
ResourceEmail	`rina.jacob@vision.com`

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. Navigate to **Resource Directory** and search for Rina in the Search section.

Rina's email address will be updated and visible in the resource pages, such as the resource directory.

How to update the phone number of a resource?

Rina Nash is a Sales Representative in Sales and Fusion Service. You can view the resource details of Rina Nash from the Resource Directory. From the Navigator, click Resource Directory and search for Rina Nash in the Search section. Rina's resource details are displayed.

In this scenario, Rina Nash changes her name to Rina Pinto Jacob after marriage. Rina not only wants to change her last name, but also wants to update her work phone number and middle name.

To update Rina's last name, work phone number, and middle name, you must create a source file (CSV) with these attributes and import it using import management. However, in this scenario, to update Rina's phone number, you must provide the work phone country code and work phone number in your CSV file.

Attribute Name	Value
ResourcePartyNumber	`Conta765976`
WorkPhoneCountryCode	+1
RawWorkPhoneNumber	510-599-7487

You can import the source data file.

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

   > **Note:** Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. Navigate to **Resource Directory** and search for Rina in the Search section.

Rina's email address is updated and visible in the resource pages, such as the resource directory.

Obtain the ResourcePartyNumber for a Resource

You can obtain the ResourcePartyNumber for a resource either from the Resource Directory or through data export.

To obtain the ResourcePartyNumber for a resource from the Resource directory:

1. From the Navigator, click Resource Directory.
2. From the Search drop-down list, select one of the following:
   - First Name
   - Last Name
   - E-mail
3. Click Search.

The Registry ID is displayed in the search results.

Alternatively, you can obtain the ResourcePartyNumber for a resource through Data Export. Export data using the **Export Management** option from the **Tools** work area. For information about exporting data, see the topic Export Data.

Related Topics

- How do I export data?

Import Your Resource Capacity Data

You can use Import Management to create, delete, or update Resource Capacity records.

To import Resource Capacity records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Resource Capacity data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Resource Capacity object, these attributes are CapacityId and PartyId.

- **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 Resource Capacity object, the attribute is CapacityNumber.

Required Attributes and Validations for Resource Capacity Object

To import data successfully into Oracle Applications 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 Resource Capacity records, required attributes for updating Resource Capacity records, prerequisite setup tasks for the attributes, and specific validations, if any, for Resource Capacity import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Resource Capacity record	Updating an Existing Resource Capacity record
CapacityId	The unique resource capacity identifier.	Integer	18	None	Not required	Required
CapacityNumber	The public unique identifier for resource capacities	String	30	Default Expression	Not required	Not required
ChannelTypeCd	The channel type that can be used by a resource	String	30	Expected values include: • ORA_SVC_CHAT • ORA_SVC_NONE • ORA_SVC_VIDEO • ORA_SVC_COBROWSE	Required	Not Required
ObjectTypeCd	The object type to which a resource can be assigned	String	30	This can be null. The only allowed value is "SVC_SERVICE_REQUESTS".	Not required.	Not required
MaximumCapacity	The maximum capacity for a resource in a channel type and object type	Integer	5	This value must be greater than or equal to zero.	Required.	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Resource Capacity record	Updating an Existing Resource Capacity record
PartyId	The resource unique identifier	Integer	18	This can be null. If a value is provided, the Resource Party Id must exist.	Not required.	Not required

You can view the Resource Capacity 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Resource Capacities** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Resource Capacity** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Forecast Quota Data

You can use Import Management to create, update, or delete your Sales Forecast Quota data.

You can import Sales Forecast Quota records using these steps:

- Map your source data to Oracle Applications Cloud object attributes.
- Create source Comma Separated Values (CSV) file for import.
- Create the import activity.
- Review the import results.

How You Map Your Source Data to Target Object Attributes

You import Sales Forecast Quota data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new action plans or are updating action plans that have source system reference data, then provide the source system and source system reference values.

Review Required Attributes and Validations for Sales Forecast Quota Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for Sales Forecast Quota records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Sales Forecast Quota Record	Updating an Existing Sales Forecast Quota Record	Deleting an Existing Sales Forecast Quota Record
ResourceQuotaEffectiv	The resource quota effective date is used to identify the period for the sales forecast quota.	A value must be provided. The date format must be in mm/dd/yy.	Required	Not Required	Not Required
MetricCode	The metric code for the sales forecast quota.	Value should match with RESOURCE_ QUOTA.	Required	Not Required	Not Required
CorporateMetricValue	The corporate metric value for the sales forecast quota.	A value must be provided.	Required	Not Required	Not Required
MetricValue	The metric value in the entered currency for the sales forecast quota.	A value must be provided.	Required	Not Required	Not Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Sales Forecast Quota Record	Updating an Existing Sales Forecast Quota Record	Deleting an Existing Sales Forecast Quota Record
CurrencyCode	The currency code entered for the sales forecast quota.	A value must be provided	Required	Not Required	Not Required
CurrencyConversionRat	The currency conversion rate from entered currency to corporate currency for the sales forecast quota.	A value must be provided.	Required	Not Required	Not Required
QuotaNumber	Finds the sales forecast quota by primary by PUID.	None	Not Required	Required	Required

You can view the Sales Forecast Quota 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 Import Activity

After you have the CSV file ready, create an import activity to import the Sales Forecast Quota information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Sales Forecast Quota from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- How You Use Alternate Keys to Import Records

How do I import sales lead data?

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

To import Sales Lead records, perform the following tasks:

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

Use the Contact time zone field to save the preferred time zone of a contact pursued on your sales lead. The contact time zone is based on the contact address and helps you know the preferred time to call or email a prospect or customer. You can also use the functional "who" columns to save the record history of a sales lead. The columns let you accurately report on sales leads that are imported from other systems.

Other sales lead management features help to align marketing and sales objectives from sales lead generation to sales lead execution. Sales Lead information is generated from a variety of sources and obtained from:

- A company's existing contacts
- Marketing campaigns

All sales leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified sales leads are converted into opportunities.

How You Map Your Source Data to Target Object Attributes

To import your sales lead data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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

To better manage your sales lead information, the sales lead object has the following child objects:

- Sales Lead Contact
- Sales Lead Product
- Sales Lead Resource

If you want to import only a few records, then you can create a single CSV file for all sales lead attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the sales lead child objects. Note that you must have imported the CSV file for sales lead object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Sales Lead object, this attribute is LeadId.
- 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 Sales Lead object, the attribute is LeadNumber.

Required Attributes and Validations for Sales Lead Object

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

This table lists the required attributes for importing new Sales Lead records, required attributes for updating Sales Lead records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Lead import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
AcceptedDate	The date the recommended lead generated by the Sales Prediction engine was accepted by a sales person or lead qualifier to pursue	No validation	A value is required if you specify the value for LeadAcceptedFlag as Y.	Not required
ActionCode	Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table,	If no value is provided, the record is updated if it already exists. Else, it's inserted	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
	DELETE to delete the record.			
ConvertedTm	The date when the lead was converted to an opportunity	No validation	A value is required if you specify the value for Lead StatusCd as CONVERTED.	Not required
LeadName	The name that identifies the lead	No validation	A value is required if you're creating a new lead.	Not required
LeadNumber	The Lead's public unique identifier value	If providing a value to update an existing lead, the value must exist in the column LEAD_NUMBER.of the MKL_LM_LEADS table.	If providing a value and creating a new lead, the value must be unique.	A value is required, if updating an existing lead and you're not providing the unique ID of the lead (ObjectKey)
ObjectKey	The unique ID for the existing lead record in the destination table	Automatically generated by the import process if creating new record. If updating an existing record and providing the LEAD_NUMBER, the import process defaults the LEAD_ ID.	Do not provide a value if creating a new lead.	A value is required, if updating an existing lead and you're not providing the LeadNumber.
OwnerId	The unique ID for the existing resource party in the destination table. The owner must also be an internal resource included as a member of the lead's sales team	If providing a value, the value must exist in the column PARTY_ID of the HZ_PARTIES table, The value must also exist in the column PARTY_ID of the JTF_RS_RESOURCE_ PROFILES table. The identified party must be assigned as a sales team resource for the existing lead or included in the resources imported in the same batch as this record.	A value is required, if creating a new lead and you don't provide the owner's source system code and reference (OwnerOrigSystem and OwnerOrigSystemReference	Not required
QualifiedDate	The date when the lead was qualified	No validation	A value is required, if you optionally provide the lead status (StatusCd) value as QUALIFIED, indicating that the lead is qualified.	Not required
RejectedTm	The date when the lead was rejected	No validation	A value is required, if you optionally provide the lead registration status (ApprovalStatus) value as REJECTED, indicating that the lead is rejected.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
RetiredTm	The date when the lead was retired	No validation	A value is required, if you optionally provide the lead status (StatusCd) value as RETIRED, indicating that the lead is retired.	Not required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the sales lead object. The page also lists attribute information like type, length, description, and so on.

> **Note:** Sales lead is hard deleted from the system. You can get information about the deleted leads if you have *Audit Reports* enabled while deleting.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Lead** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the sales lead information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Lead from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Sales Lead Contact Data

You can use the Import Management to create, update, or delete sales lead contact records.

You can import sales lead contact records using these steps:

1. Map your source sales lead contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales lead contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your sales lead contact data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new sales lead contacts or are updating sales lead contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Lead Contact Object

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

This table lists the required attributes for sales lead contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Contact record	Updating an Existing Sales Lead Contact record
LeadOrigSystem	The code that identifies the original source system for the sales lead	If providing a value and importing a new sales lead in the same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.	Conditionally required, when the lead is created in the same batch as adding a new lead contact	Not required
LeadOrigSystemReference	The ID that identifies the original source system reference for the sales lead	If providing a value and importing a new sales lead in the same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_t table.	Conditionally required, when the lead is created in the same batch as adding a new lead contact	Not required
LeadId	The unique ID for the existing lead record in the destination table	The value provided must match the value in the LEAD_ID column of the MKL_LM_LEADS table.	Conditionally required, when the lead is created in a different batch as adding a new lead contact.	Not required
PartyOrigSystem	The code that identifies the original source system for the contact	If providing a value, the combination of source system reference (PartyOrigSystemReference)	Conditionally required, when you don't provide the contact's party ID (PartyId)	Conditionally required, when you don't provide the unique ID for the record

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Contact record	Updating an Existing Sales Lead Contact record
		and source system code (PartyOrigSystem) must exist in the columns ORIG_ SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ ORIG_SYS_REFERENCES table.		(LeadTcMembersId) or the contact's party ID (PartyId)
PartyOrigSystemReference	The ID that identifies the original source system reference for the contact	If providing a value, the combination of source system reference (PartyOrigSystemReference) and source system code (PartyOrigSystem) must exist in the columns ORIG_ SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ ORIG_SYS_REFERENCES table.	Conditionally required when you don't provide the contact's party ID	Conditionally required when you don't provide the unique ID for the record (LeadTcMembersId) or the contact's party ID (PartyId)
PartyId	The unique ID for the existing contact's party record in the destination table	The value provided must match the value in the PARTY_ID column of the HZ_PARTIES table.	Conditionally required when you don't provide the contact's source system and source system reference	Conditionally required when you don't provide the contact's source system and source system reference
PrimaryFlag	Specifies whether the provided contact is a primary contact on the sales lead	The value must be either Y or N.	Conditionally required, as at least one contact for a lead has this value set to Y.	Conditionally required, as at least one contact for a lead has this value set to Y.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the sales lead contact object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Lead Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the sales lead contact information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Lead Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Sales Lead Product Data

You can use the Import Management to create, update, or delete sales lead product records.

You can import sales lead product records using these steps:

1. Map your source sales lead product data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales lead product data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your sales lead product data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new sales lead products or are updating sales lead products that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Lead Product Object

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

This table lists the required attributes for sales lead product records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Product record	Updating an Existing Sales Lead Product record
ItemId	The unique ID for the existing sales catalog product (item) record in the destination table	The value provided must match the value in the INVENTORY_ITEM_ ID column of the EGP_ SYSTEM_ITEMS_B table.	Conditionally required, when you don't provide the ProductName and ProductGroupId/ ProductGroupName	Conditionally required, when you don't provide the ProductName and ProductGroupId/ ProductGroupName
ItemNumber	The unique ID for the existing sales catalog product (item number)	The value provided must match the value in the ITEM_NUMBER column of	Conditionally required, when you don't provide the ProductName	Conditionally required, when you don't provide the ProductName

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Product record	Updating an Existing Sales Lead Product record
	record in the destination table	the EGP_SYSTEM_ITEMS_B table.	and ProductGroupId/ ProductGroupName	and ProductGroupId/ ProductGroupName
LeadNumber	Leads Public Unique Identifier value	The value provided must match the value in the LEAD_NUMBER column of the MKL_LM_LEADS table.	Conditionally required, when you don't provide the LeadId	Conditionally required, when you don't provide the LeadId
PrimaryFlag	Indicates whether the product or product group is the primary product of interest for the lead	The value must be either Y or N.	Conditionally required, as at least one product or product group for a lead has this value set to Y	Conditionally required, as at least one product or product group for a lead has this value set to Y
ProductGroupInternalName	Internal name for the sales catalog product group	The value provided must match the value in the INTERNAL_NAME column of the QSC_PROD_GROUPS_B table.	Conditionally required, when you don't provide the ProductGroupId and ItemId/ProductName	Conditionally required, when you don't provide the ProductGroupId and ItemId/ProductName
ProductGroupId	The unique ID for the existing product group record in the destination table	The value provided must match the value in the PROD_GROUP_ID column of the QSC_PROD_GROUPS_B table.	Conditionally required, when you don't provide the ProductGroupName and ItemId/ProductName	Conditionally required, when you don't provide the ProductGroupName and ItemId/ProductName
ProductGroupName	The internal name for the sales catalog product group	The value provided must match the value in the INTERNAL_NAME column of the QSC_PROD_GROUPS_B table.	Conditionally required, when you don't provide ProductGroupId and ItemId/ProductName	Conditionally required, when you don't provide ProductGroupId and ItemId/ProductName
ProductName	The internal name for the sales catalog product	The value provided must be defined for the sales catalog specified for the QSC_SALES_PRODUCTS_INVENTORY_ORG_ID profile.	Conditionally required, when you don't provide the ItemId and ProductGroupId/ ProductGroupName	Conditionally required, when you don't provide the ItemId and ProductGroupId/ ProductGroupName

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the sales lead product object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Lead Product** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the sales lead product information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Lead Product from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Sales Lead Resource Data

You can use the Import Management to create, update, or delete sales lead resource records.

You can import sales lead resource records using these steps:

1. Map your source sales lead resource data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales lead resource data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your sales lead resource data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new sales lead resources or are updating sales lead resources that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Lead Resource Object

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

This table lists the required attributes for sales lead resource records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Resource record	Updating an Existing Sales Lead Resource record
LeadId	The unique ID for the existing lead record in the destination table	The value provided must match the value in the	Conditionally required, when you don't provide the LeadNumber	Conditionally required, when you don't provide the LeadNumber

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Resource record	Updating an Existing Sales Lead Resource record
		LEAD_ID column of the MKL_LM_LEADS table.		
LeadNumber	The Lead's Public Unique Identifier value	The value provided must match the value in the LEAD_NUMBER column of the MKL_LM_LEADS table.	Conditionally required, when you don't provide the LeadId	Conditionally required, when you don't provide the LeadId
LeadOrigSystem	The code that identifies the original source system for the sales lead	If providing a value and importing a new sales lead in the same import as this lead resource association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigsystem) in the MKT_IMP_LEADS_T table.	Conditionally required, when the lead is created in the same batch as adding a new team member	Not required
LeadOrigSystemReference	The ID that identifies the original source system reference for the sales lead	If providing a value and importing a new sales lead in the same import as this lead resource association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.	Conditionally required, when the lead is created in the same batch as adding a new team member	Not required
LeadResourceId	The unique ID for the existing sales team member (resource) association record in the destination table	Automatically generated by the import process	Automatically generated by the import process if creating a new record	Required
ResourceId	The unique ID for the existing resource's party record in the destination table	Provided value must match with PARTY_ID column of HZ_PARTIES table.	Conditionally required, when you don't provide the resource's source system and source system reference or the resource's user name.	Conditionally required, when you don't provide the unique ID for the record or the resource's source system and source system reference.
ResourceOrigSys	The source system code that identifies the original source system of the lead sales team members party	If providing a value, the combination of source system reference (ResourceOrigSysRef) and source system code (ResourceOrigSys) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_	Conditionally required, when you don't provide the resource's party ID (ResourceId)	Conditionally required, when you don't provide the unique ID for the record (LeadResourceId) or the resource's party ID (ResourceId)

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Resource record	Updating an Existing Sales Lead Resource record
		ORIG_SYS_REFERENCES table.		
ResourceOrigSysRef	The ID that identifies the lead sales team member's party in your legacy or external system	If providing a value, the combination of source system reference (ResourceOrigSysRef) and source system code (ResourceOrigSys) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ORIG_SYS_REFERENCES table.	Conditionally required, when you don't provide the resource's party ID (ResourceId)	Conditionally required, when you don't provide the unique ID for the record (LeadResourceId) or the resource's party ID (ResourceId)
UserName	The resources application user name.	No validation	Conditionally required, when you don't provide the resource's source system and source system reference or the resource's unique ID	Not required
PrimaryFlag	Indicates whether the resource is the Owner of the lead	The value must be either Y or N.	Conditionally required, as at least one contact for a lead has this value set to Y	Conditionally required, as at least one contact for a lead has this value set to Y

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the sales lead resource object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Lead Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the sales lead resource information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Lead Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Sales Objective Data

You can use the Import Management to create or update Sales Objective records.

To import Sales Objective records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Sales Objective data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Sales Objective object, this attribute is ObjectiveId:
- **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 Sales Objective object, the attribute is ObjectiveNumber.

Required Attributes and Validations for Sales Objective Object

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

This table lists the required attributes for importing new Sales Objective records, required attributes for updating Sales Objective records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Objective import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Sales Objective record	Updating an Existing Sales Objective record
ObjectiveTypeCode	Stores the type of the objective	String	30	Identify the objective type. Navigate to the following in the Setup and Maintenance Work area: • Offering: Sales • Functional Area: Data Import and Export	Required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Sales Objective record	Updating an Existing Sales Objective record
				• Task: Manage Objective Types		
PeriodTypeCode	Specifies the type of period such as quarter or year	String	30	Use the Manage Calendar Profile Option task to set a value for ZCA_COMMON_ CALENDAR..	Required	Not required
Name	Objective Name	String	60	No validation	Required	Not Required
StartDisplayPeriodN	Objective Start Period Display Name	String	60	No validation	Required	Not Required
EndDisplayPeriodNa	Objective End Period Display Name	String	60	No validation	Required	Not Required
ObjectiveId	Internal unique identifier	Long	18	No validation	Not required	A value is required, if you don't provide the PUID.
ObjectiveNumber	Public unique identifier	String	64	No validation	Not required	A value is required, if you don't provide the ObjectiveID.

You can view the Sales Objective 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Objective** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Objective** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

6. 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. In the Navigator, under **Tools**, click **Import Management**.
2. 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.
3. 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.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Promotion Data

You can use the Import Management to create or update Sales Promotion records.

To import Sales Promotion records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (.csv) file for import.

3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

To import your Sales Promotion Setup data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Promotion object, this attribute is SalesPromotionId.
- **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 Promotion object, the attribute is SalesPromotionCode.

Required Attributes and Validations for Sales Promotion Object

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

This table lists the required attributes for importing new Sales Promotion records, required attributes for updating Sales Promotion records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Promotion import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Sales Promotion Record	Updating an Existing Sales Promotion Record
StatusCode	A unique identifier for the current status of the sales promotion	String	30	Accepts either ACTIVE or INACTIVE	This defaults to Active status.	Optional
AdjustmentTypeCo	Abbreviation that identifies the type of manual price adjustment	String	30	Accepts either LNDISCPERC or LNDISCAMT	This defaults to LNDISCPERC.	Optional
SalesPromotionId	The unique identifier of the sales promotion	Long	18	No validation	This is auto generated.	Required
Name	The name of the sales promotion	String	150	Enter a unique value.	Required	Optional
SalesPromotionCod	The code indicating the type of the sales promotion. This value is generated when a sales promotion is created.	String	80	No validation	This is auto generated. You can also enter a value.	Required
AdjustmentBasisCo	The code indicating the basis of the sales promotion adjustment when the adjustment type is Percent. For example List Price or Net Price	String	30	Accepts either LISTPRICE or NETPRICE	Defaults to LISTPRICE	Optional
Description	A brief description of the sales promotion	String	1999	No validation	Not required	Optional
StartDate	The date and time at which the sales promotion is available	Date		Start date can't be later than the end date.	Not required	Optional
EndDate	The date and time up to which the sales promotion is available	Date		Start date can't be later than the end date.	Not required	Optional

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Sales Promotion Record	Updating an Existing Sales Promotion Record
AdjustmentValue	The value of the sales promotion adjustment	BigDecimal		A value is mandatory if the status is set to ACTIVE.	A value is required if the status is Active.	Optional
CurrencyCode	The currency code of the sales promotion adjustment when the adjustment type is "Amount"	String	15	A value is mandatory if the AdjustmentTypeCod is LNDISCAMT.	A value is required if the AdjustmentTypeCod is LNDISCAMT.	Optional

You can view the 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Promotion** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

To import data into Oracle Applications 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. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Promotion** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. 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.

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

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Resource Period Quota Data

You can use the import functionality to create or update Sales Resource Period Quota records.

You can import Sales Resource Period Quota records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Sales Resource Period Quota data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Sales Resource Period Quota data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Sales Resource Period Quota import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Sales Resource Period Quota while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: You can't create Sales Resource Period Quota records. If you're updating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Sales Resource Period Quotas or are updating Sales Resource Period Quotas that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Resource Period Quota Object

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

This table lists the required attributes for Sales Resource Period Quota records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Resource Period Quota record	Updating an Existing Sales Resource Period Quota record	Deleting an Existing Sales Resource Period Quota record
QuotaPlanName	Name of the Quota Plan	Quota plan has to be in Active status and tracked. The territory should be non-excluded and not published.	Required	Required	Required
TerritoryNumber	Territory number for which data is imported	The territory must exist. It must be non-excluded and not published.	Required	Required	Required
GoalNumber	The public unique identifier of the goal	When creating a sales resource quota record, the goal should be in Active status.	Required	Required	Required
PeriodName	The period for which data is imported	The calendar setup for the year.	Not applicable You can't create a Sales Resource Period Quota record.	Not updatable	Not required
ResourcePeriodQuota	The quota value to be imported	Enter a positive number.	Not applicable	This is updatable, if the Territory Quota	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Resource Period Quota record	Updating an Existing Sales Resource Period Quota record	Deleting an Existing Sales Resource Period Quota record
			You can't create a Sales Resource Period Quota record.	is in "Not Published" status.	
ResourceEmail	This is the territory resource's email address for which you need to set the quota.	It should be a valid email address of the territory resource.	Required	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Sales Resource Period Quota object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Sales Resource Period Quota object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Sales Resource Period Quota information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Sales Resource Period Quota** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Resource Quota Data

You can use the import functionality to create or update Sales Resource Quota records.

You can import Sales Resource Quota records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Sales Resource Quota data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Sales Resource Quota data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Sales Resource Quota import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Sales Resource Quota while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: You can't create Sales Resource Quota records. If you're updating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Sales Resource Quotas or are updating Sales Resource Quotas that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Resource Quota Object

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

This table lists the required attributes for Sales Resource Quota records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Resource Quota record	Updating an Existing Sales Resource Quota record	Deleting an Existing Sales Resource Quota record
QuotaPlanName	Name of the Quota Plan	Quota plan has to be in Active status and tracked. The territory should be non-excluded and not published.	Required **Note:** When you create a Sales Resource Quota record, the corresponding Sales Resource Period quota record also gets created.	Required	Required **Note:** When you delete a Sales Resource Quota record, the corresponding Sales Resource Period quota record also gets deleted.
TerritoryNumber	Territory number for which data is imported	The territory must exist. It must be non-excluded and not published.	Required	Required	Required
GoalNumber	The public unique identifier of the goal	When creating a sales resource quota record, the goal should be in Active status.	Required	Required	Required
ResourceQuota	Quota value to be imported for a territory resource	This must be greater than or equal to zero.	This can't be created for the owner with Sales Revenue Goal (GOAL_1000).	This can't be deleted for the owner with Sales Revenue Goal (GOAL_1000).	Not required
ResourceEmail	This is the territory resource's email address for which you need to set the quota.	It should be a valid email address of the territory resource.	Required	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Sales Resource Quota object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Sales Resource Quota object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Sales Resource Quota information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Sales Resource Quota** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

How do I import sales team member data?

You can use Import Management to create or update sales team member records.

You can import sales team member records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales team member data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import sales team member data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the sales team member import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate sales team member while importing, to avoid redundant data.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records. Also ensure that the parent records, such as accounts, are in active status.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Sales Team Members or are updating Sales Team Members that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Team Member Object

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

This table lists the required attributes for sales team member records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Team Member record	Updating an Existing Sales Team Member record
TeamMemberId	Sales Team Member ID. This is the primary key.	N/A	N/A	If available, provide this to update other attributes.
SalesProfileID	Sales Profile ID	Active SalesProfileID to have been created already.	Conditionally required To be provided if none of the following are available: • PartyID • PartyNumber • Combination of PartySourceSystem and PartySourceSystemRef	Conditionally required To be provided if TeamMemberID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.
PartyID	Sales Account ID	N/A	Conditionally required To be provided if SalesProfileID isn't available.	Conditionally required To be provided if TeamMemberID or SalesProfileID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.
PartySourceSystem	Party source system of the Sales account	N/A	Conditionally required To be provided if SalesProfileID isn't available. To be provided along with PartySourceSystemReferenc	Conditionally required To be provided if TeamMemberID or SalesProfileID or PartyID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.
PartySourceSystemReferenc	Party source system reference of the Sales account	N/A	Conditionally required To be provided if SalesProfileID isn't available. To be provided with PartySourceSystem.	Conditionally required To be provided if TeamMemberID or SalesProfileID or PartyID isn't available. To be provided along with ResourceID or

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Team Member record	Updating an Existing Sales Team Member record
				ResourcePartyNumber or ResourceEmailAddress.
PartyNumber	Party number of the sales account/PUID	N/A	Conditionally required To be provided if SalesProfileID isn't available	Conditionally required To be provided if TeamMemberID or SalesProfileID or PartyID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.
ResourceID	Resource identifier	Active ResourceID to have been created already.	Conditionally required To be provided if ResourcePartyNumber or ResourceEmailAddress isn't available.	Conditionally required To be provided if TeamMemberID isn't available. To be provided along with SalesProfileID or PartyID or PartyNumber or PartySourceSystem along with PartySourceSystemReference.
ResourcePartyNumber	Resource party number/ PUID	N/A	Conditionally required To be provided if ResourceID isn't available.	Conditionally required To be provided if TeamMemberID or ResourceID isn't available. To be provided along with SalesProfileID or PartyID or PartyNumber or PartySourceSystem along with PartySourceSystemReference.
ResourceEmailAddress	Resource email address	N/A	Conditionally required To be provided if ResourceID isn't available	Conditionally required To be provided if TeamMemberID or ResourceID or ResourcePartyNumber isn't available. To be provided along with SalesProfileID or PartyID or PartyNumber or PartySourceSystem along with PartySourceSystemReference.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the sales team member object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the sales team member object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the sales team member information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Sales Team Member** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel

Import Your Sales Territory Data

You can use Import Management to create, update or delete Sales Territory records.

To import Sales Territory records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Sales Territory data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
  - When creating a territory, the sales territory import file must be imported before importing the sales territory resource, sales territory coverage, or sales territory line of business import files.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.
- You have created a proposal in the Classic Territories pages, if you want to update territories as part of a proposal. Optionally, you can add territories to update the proposal.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the Public unique identifier. 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 Sales Territory object, the attributes are UniqueTerritoryNumber, ProposalNumber and OwnerResourceNumber.

Required Attributes and Validations for the Sales Territory Object

To import data successfully into Oracle Applications 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 Sales Territory records, required attributes for updating Sales Territory records, required attributes for deleting Sales Territory records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Territory import:

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Record	Updating a Sales Territory Record	Deleting an Existing Sales Territory Record
UniqueTerritoryNun	The public unique identifier number of the territory	Text	Not applicable	Optional	Required	Required
ProposalNumber	The public unique identifier number of the proposal	Text	Not applicable	A value is required if you're creating a territory that's part of a proposal.	Not required	Not required
ParentTerritoryUniq	The public unique identifier number of the parent territory	Text	Not applicable	A value is required unless you're creating a top level territory.	A value is required if you're moving a territory under a different parent.	Don't provide a value.
TypeCode	The type of the territory such as PRIME or OVERLAY	Text	Not applicable	Required	Conditionally required if you need to update the territory type	Don't provide a value.
CoverageModel	Coverage Model	Text	Not applicable	Required. The available values are SALES_ ACCOUNT_ CENTRIC or PARTNER_ CENTRIC	Don't provide a value.	Don't provide a value.
StatusCode	The status of the territory, such as FINALIZED.	Text	Not applicable	A value is required if you're creating an active territory. The value is FINALIZED.	Don't provide a value.	Don't provide a value.
TerritoryName	The name that identifies the territory.	Text	Not applicable	Required	Optional	Don't provide a value.
Owner	The name of the owner resource	Text	Not applicable	Don't provide a value.	Don't provide a value.	Don't provide a value.
OwnerResourceNun	The public unique identifier number of the owner resource	Text	Not applicable	Required	Conditionally required if you need to update the owner	Don't provide a value.

You can view the Sales Territory object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Territory** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Territory from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
    - The ParentUniqueTerritoryNumber isn't automatically mapped to the Parent Unique Territory Number. Use the **Save As** option to create a mapping, name the mapping, and map the Parent Unique Territory Number target attribute to the Source File ParentUniqueTerritoryNumber Attribute, by dragging the target attribute to the Attribute Display Name. Select and apply this new import mapping in the Map Fields page of a future sales territory import activity.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Territory Coverage Data

You can use Import Management to create or delete Sales Territory Coverage records.

To import Sales Territory Coverage records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Sales Territory Coverage data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
    - When creating a territory, the sales territory import file must be imported before importing the sales territory resource, sales territory coverage or sales territory line of business import files.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the Public unique identifier. If you're creating new records, then you can provide the appropriate user-friendly public unique identifiers (attributes denoted with 'Number' and usually visible in the business object's UI). For the Sales Territory Coverage object, the attributes are UniqueTerritoryNumber, CoverageTypeCode and DimensionCode. If you delete a sales territory resource record, you can use a combination of the UniqueTerritoryNumber and CoverageNumber attributes to identify the record. Oracle recommends that you don't update the Sales Territory Coverage object. For example, to update the AddressCity of the `Addr` (DimensionCode) coverage record, delete the record and create a new record with the correct AddressCity value.

Required Attributes and Validations for Sales Territory Coverage Object

To import data successfully into Oracle Applications 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 Sales Territory Coverage records, required attributes for deleting Sales Territory Coverage records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Territory Coverage import:

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
UniqueTerritoryNumber	The public unique identifier number of the territory	Text	Not applicable	Required
CoverageNumber	The public unique identifier number of the territory coverage	Text	Not applicable	Don't provide a value.
CoverageTypeCode	The code of the territory coverage type	Text	Not applicable	Required Values are REGULAR, INCLUSION, and EXCLUSION
TerrDimensionCode	The code of the dimension	Text	Not applicable	Required if passing the related dimension member information. The values are: • `Acct` • AcTyp • `Addr` • Aux1 • Aux2 • Aux3 • `Bunit` • `CSize` • Geo • Indst • Prtnr • Prod • OrgTp • Schnl don't provide a value, if creating a dimensional coverage of Any (for every dimension including Address)

Depending on the dimension coverage there may be additional required attributes for importing new Sales Territory Coverage records. The following tables list the required attributes for importing new Sales Territory Coverage records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Territory Coverage import:

If the DimensionCode = `Acct`

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
RegistryId	The public unique identifier number of the account	Text	Not applicable	Either the RegistryID or the OriginalReference is Required.
OriginalReference	The original system / original system reference of the account.	Text	Not applicable	Either the RegistryID or the OriginalReference is Required.
CoverageTypeCode	The code of the territory coverage type	Text	Not applicable	Required Values are REGULAR, INCLUSION, and EXCLUSION
IncludeHierarchyFlag	An indicator of whether the account hierarchy is included	Text	Not applicable	Optional. Applicable values Y or N.

> **Note:** During import, the application attempts to lookup the account using RegistryId, but if not found it uses OriginalReference. If values for both RegistryID and OriginalReference are passed, then the RegistryID is used first.

If the DimensionCode = Geo

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
GeographyName	The geography name including the hierarchy	Text	Not applicable	Required
GeographyHighName	The upper level of the geography name range including the hierarchy	Text	Not applicable	Required only if defining a range of geography dimension members

If the DimensionCode = `Addr`

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
AddressCountry	The code of the address country	Text	Not applicable	Required

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
AddressState	The address state	Text	Not applicable	Optional
AddressProvince	The address province	Text	Not applicable	Optional
AddressCounty	The address county	Text	Not applicable	Optional
AddressCity	The address city	Text	Not applicable	Optional
AddressPostalCode	The address postal code	Text	Not applicable	Optional
AddressElementAttribute1	The additional address element 1	Text	Not applicable	Optional
AddressElementAttribute2	The additional address element 2	Text	Not applicable	Optional
AddressElementAttribute3	The additional address element 3	Text	Not applicable	Optional
AddressElementAttribute4	The additional address element 4	Text	Not applicable	Optional
AddressElementAttribute5	The additional address element 5	Text	Not applicable	Optional

If the DimensionCode = OrgTp

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
OrganizationTypeCode	The code of the organization type	Text	Not applicable	Required

If the DimensionCode = Indst

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
IndustryCode	The code of the industry	Text	Not applicable	Required

If the DimensionCode = `Csize`

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
CustomerSizeCode	The code of the customer size	Text	Not applicable	Required

If the DimensionCode = AcTyp

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
AccountTypeCode	The named account code	Text	Not applicable	Required

If the DimensionCode = Prod

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
ProductGroupNumber	The public unique identifier number of the product group	Text	Not applicable	Required if creating a sales territory coverage for a product group
ItemNumber	The public unique identifier number of the item	Text	Not applicable	Required if creating a sales territory coverage for an item
InventoryOrgId	The identifier of the inventory organization	Number	Not applicable	Required if creating a sales territory coverage for an item, but only when the value is different from the default inventory organization identifier specified in the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID.

If the DimensionCode = `BUnit`

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
BusinessUnitName	The name of the business unit	Text	Not applicable	Required

If the DimensionCode = Aux1

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
Auxiliary1Code	The code of the auxiliary classification 1	Text	Not applicable	Required

If the DimensionCode = Aux2

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
Auxiliary2Code	The code of the auxiliary classification 2	Text	Not applicable	Required

If the DimensionCode = Aux3

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
Auxiliary3Code	The code of the auxiliary classification 3	Text	Not applicable	Required

If the DimensionCode = Schnl

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
SalesChannelCode	The code of the sales channel	Text	Not applicable	Required
SubSalesChannelCode	The code of the sub sales channel	Text	Not applicable	Optional

If the DimensionCode = Prtnr

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Coverage Record
PartnerNumber	The public unique identifier number (or company number) of the partner	Text	Not applicable	Required

You can view the Sales Territory Coverage object 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.

Required Attributes and Validations for Deleting Sales Territory Coverage Object

You can delete a sales territory coverage record using Unique Territory Number, Dimension Code and other attributes or Unique Territory Number and Coverage Number.

Delete a Sales Territory Coverage using Attribute and Dimension Code

A Sales Territory Coverage record can be deleted using the following fields:

- Unique territory number (UniqueTerritoryNumber): The public unique identifier number of the territory
- Coverage type code (CoverageTypeCode): The coverage type code. Possible values are REGULAR, INCLUSION, or EXCLUSION
- Dimension code (TerrDimensionCode) : The possible values are listed in the table below:

Dimension Field(s)

Dimension	Dimension Code	Dimension Field
Sales Channel		Either SalesChannelCode or SubSalesChannelCode
Product	Prod	ProductGroupNumber or ProductGroupId OR ItemNumber or InventoryItemId
Account Type	AccTp	AccountTypeCode
Address	Addr	AddressCountry and (optionally) one or more of the following: • AddressState • AddressProvince • AddressCounty • AddressCity • AddressPostalCode • AddressElementAttribute1 • AddressElementAttribute2 • AddressElementAttribute3 • AddressElementAttribute4 • AddressElementAttribute5
Auxiliary 3	Aux3	Auiliary3Code
Auxiliary 1	Aux1	Auiliary1Code
Auxiliary 2	Aux2	Auiliary2Code
Business Unit	BUnit	BusinessUnitName or BusinessUnitId
Customer Size	CSize	CustomerSizeCode

Dimension	Dimension Code	Dimension Field
Geography	Geo	GeographyId or GeographyName (the full path needs to be provided e.g. >United States>CA or ~Global~North America) For Geo ranges, also provide GeographyHighId or GeoHighName - the full path needs to be provided (optional)
Industry	Indst	IndustryCode
Organization Size	OrgTp	OrganizationTypeCode
Partner	Prtnr	PartnerNumber or PartnerId
Account	Acct	RegistryId or OriginalReference or AccountId

Delete a Sales Territory Coverage using Unique Territory Number and Coverage Number

A Sales Territory Coverage record can be deleted using the Unique Territory Number and Coverage Number.

Required Attributes to Delete a Sales Territory Coverage

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Deleting an Existing Sales Territory Coverage Record
UniqueTerritoryNumber	The public unique identifier number of the territory.	Text	Not applicable	Required
CoverageNumber	The public unique identifier number of the territory coverage.	Text	Not applicable	Required

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Standard Text** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Territory Coverage from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. Under **Advanced** options, select the **Import Mode** as Create records or Delete Records.
6. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
7. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
8. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?
- Remove Customer Inclusions Using Import Management
- Add Customer Inclusions Using Import Management

Import Your Sales Territory Line of Business Data

You can use Import Management to create or delete Sales Territory Line of Business records.

To import Sales Territory Line of Business records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Sales Territory Line of Business data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
  - When creating a territory, the sales territory import file must be imported before importing the sales territory resource, sales territory coverage, or sales territory line of business import files.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. If you're creating new records, then you can provide the appropriate user-friendly public unique identifiers (attributes denoted with 'Number' and usually visible in the business object's UI). For the Sales Territory Line of Business object, the attributes are UniqueTerritoryNumber and LobCode. If you delete a sales territory line of business record, you can use a combination of the UniqueTerritoryNumber and LobCode attributes to identify the appropriate record.

Required Attributes and Validations for Sales Territory Line of Business Object

To import data successfully into Oracle Applications 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 Sales Territory Line of Business records, required attributes for deleting Sales Territory Line of Business records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Territory Line of Business import:

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Line of Business Record	Deleting an Existing Sales Territory Line of Business Record
UniqueTerritoryNumbe	The public unique identifier number of the territory	Text	Not applicable	Required	Required
LobCode	The code of the line of business.	Text	Not applicable	Required.	Required

You can view the Sales Territory Line of Business object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Territory Line of Business** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Territory Line of Business from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. Under **Advanced** options, select the **Import Mode** as Create records or Delete Records.
6. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
7. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
8. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Territory Period Quota Data

You can use the import functionality to create or update Sales Territory Period Quota records.

You can import Sales Territory Period Quota records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Sales Territory Period Quota data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Sales Territory Period Quota data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Sales Territory Period Quota import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Sales Territory Period Quota while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Sales Territory Period Quota attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Sales Territory Period Quota child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: You can't create Sales Territory Period Quota records. If you're updating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Sales Territory Period Quotas or are updating Sales Territory Period Quotas that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Territory Period Quota Object

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

This table lists the required attributes for Sales Territory Period Quota records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Period Quota record	Updating an Existing Sales Territory Period Quota record
QuotaPlanName	Name of the Quota Plan	Quota plan has to be in Active status and tracked.	Not applicable You can't create a Sales Territory Period Quota record.	Not updatable
TerritoryNumber	Territory number for which the period data is imported	The territory must exist and be non-excluded.	Not applicable You can't create a Sales Territory Period Quota record.	Not updatable
PeriodName	Period for which data is imported	The calendar setup for the year.	Not applicable You can't create a Sales Territory Period Quota record.	Not updatable
TerritoryPeriodQuota	Quota value to be imported	Enter a positive number.	Not applicable You can't create a Sales Territory Period Quota record.	This is updatable, if the Territory Quota is in "Not Published" status.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Sales Territory Period Quota object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Sales Territory Period Quota object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Sales Territory Period Quota information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Sales Territory Period Quota** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Territory Quota Data

You can use the import functionality to create or update Sales Territory Quota records.

You can import Sales Territory Quota records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Sales Territory Quota data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Sales Territory Quota data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Sales Territory Quota import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Sales Territory Quota records while importing, to avoid redundant data.

If you want to import only a few records, then you can create a single CSV file for all Sales Territory Quota attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the Sales Territory Quota child objects. Note that you must have imported the CSV file for Sales Territory Quota object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: You can't create Sales Territory Quota records. If you're updating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Sales Territory Quotas or are updating Sales Territory Quotas that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Territory Quota Object

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

This table lists the required attributes for Sales Territory Quota records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Quota record	Updating an Existing Sales Territory Quota record
QuotaPlanName	Name of the Quota Plan	Quota plan must be in Active status and tracked.	Not applicable You can't create a Sales Territory Quota record.	Not updatable
TerritoryNumber	Territory number for which data is imported	The territory must exist and be non-excluded.	Not applicable You can't create a Sales Territory Quota record.	Not updatable
TerritoryQuota	Quota value to be imported	Enter a positive number.	Not applicable You can't create a Sales Territory Quota record.	This is updatable, if the Territory Quota is in "Not Published" status.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the Sales Territory Quota object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Sales Territory Quota object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the Sales Territory Quota information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Sales Territory Quota** from the **Object** drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How You Use Alternate Keys to Import Records
- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Sales Territory Resource Data

You can use Import Management to create or delete Sales Territory Resource records.

To import Sales Territory Resource records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Sales Territory Resource data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
    - When creating a territory, the sales territory import file must be imported before importing the sales territory resource, sales territory coverage, or sales territory line of business import files.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option to uniquely identify an object record is through the Public unique identifier. If you're creating new records, then you can provide the appropriate user-friendly public unique identifiers (attributes denoted with 'Number' and usually visible in the business object's UI). For the Sales Territory Resource object, the attributes are UniqueTerritoryNumber and ResourcePartyNumber. If you delete a sales territory resource record, you can use a combination of the UniqueTerritoryNumber and ResourcePartyNumber attributes to identify the appropriate record. Oracle recommends that you don't update the Sales Territory Resource object. For example, to update the FunctionCode of the record; instead delete the record and then create a new record with the correct FunctionCode value.

Required Attributes and Validations for the Sales Territory Resource Object

To import data successfully into Oracle Applications 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 Sales Territory Resource records, required attributes for deleting Sales Territory Resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Territory Resource import:

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Resource Record	Deleting an Existing Sales Territory Resource Record
UniqueTerritoryNumbe	The public unique identifier number of the territory	Text	Not applicable	Required	Required
ResourcePartyNumber	The public unique identifier number of the resource	Text	Not applicable	Required.	Required
FunctionCode	The code of the function (or role) of the territory member	Text	Not applicable	Optional. Required if changing the function of the territory owner or member.	Don't provide a value.
AdministratorFlag	An indicator of whether the territory member is a delegated administrator for the territory	Text	Not applicable	Optional Required if changing the delegated administrator of the	Don't provide a value.

Attribute	Description	Data Type	Prerequisite Setup Task/ Import Validations	Creating a Sales Territory Resource Record	Deleting an Existing Sales Territory Resource Record
				territory owner or member.	
ManageForecastFlag	An indicator of whether the territory member is the forecasting delegate	Text	Not applicable	Optional Required if changing the forecasting delegate of the territory owner or member.	Don't provide a value.

You can view the Sales Territory Resource object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Sales Territory Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Territory Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. Under **Advanced** options, select the **Import Mode** as Create records or Delete Records.
6. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
    - The ResourcePartyNumber isn't automatically mapped to the Resource Registry ID. Use the **Save As** option to create a mapping, name the mapping and map the Resource Registry ID target attribute to the Source File ResourcePartyNumber attribute, by dragging the target attribute to the Attribute Display Name. Select and apply this new import mapping in the Map Fields page of a future sales territory resource import activity.
7. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
8. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Self-Service Role Data

You can use Import Management to create self-service users and can also use it to delete existing self-service users or grant them additional roles.

To import Self-Service users, perform the following tasks:

1. Map your source data to Self-Service Role object attributes.
2. Create source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

To import your Self-Service Role data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Self-Service Role Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Self-Service Role records, prerequisite setup tasks for the attributes, and specific validations, if any, for Self-Service Role import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Self-Service Role Record	Deleting an Existing Self-Service Role Record
ContactPartyId	The party ID of the contact record of the self-service user associated with the role.	The contact must exist.	Provide a valid value if the ContactPartyNumber isn't specified.	Not Required
RequestTypeCd	The code that indicates the Registration Request type. The list of accepted values is defined in the ORA_SVC_CSS_REQ_TYPE_CD lookup type.	No Validation	Provide one of the following values: • ORA_CSS_REQ_TYPE_CONTACT • ORA_CSS_REQ_TYPE_CONSUMER	Not Required
RelationshipTypeCd	The code that indicates the role type. The list of accepted values is defined in the ORA_SVC_CSS_REL_TYPE_CD lookup type. The following values can be assigned: • ORA_CSS_USER: Corresponds to the Digital Customer Service User role. • ORA_CSS_ACC_MGR: Corresponds to the Digital Customer Service Account Manager role. • ORA_CSS_ACC_ADMIN: Corresponds to the Digital Customer Service Account Administrator role. Multiple roles can be assigned to a user and	No Validation	Provide one or more of the following values: • ORA_CSS_USER • ORA_CSS_ACC_MGR • ORA_CSS_ACC_ADMIN	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Self-Service Role Record	Deleting an Existing Self-Service Role Record
	must be concatenated with the character, '&'. For example, ORA_CSS_USER&ORA_CSS_ACC_ADMIN			
ContactPartyNumber	The party number of the contact record of the self-service user associated with the role.	The contact must exist.	Provide a valid value if the ContactPartyId isn't specified.	Not Required
AccountPartyNumber	The party number of the account of the self-service user associated with the role.	An account must exist.	Provide a valid value if the AccountPartyId isn't specified.	Not Required
RoleId	The unique identifier of the self-service user role.	A user role must exist.	The RoleId should not be provided.	Required
LoginId	The login Id of the self-service user associated with the role. If the SVC_CSS_IMP_SIGN_IN_ATTR_NAME profile option is set, then the LoginId is optional.	Login ID should be unique to each user.	Provide a valid value if the SVC_CSS_IMP_SIGN_IN_ATTR_NAME profile option isn't set.	Not Required
AccountPartyId	The party ID of the account of the self-service user associated with the role.	An account must exist.	Provide a valid value if the AccountPartyNumber isn't specified.	Not Required

Note: You can only create and delete self-service role records. You can't update self-service role records.

You can view the Self-Service Role 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Self-Service Role** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Consider the following points:

- Role Id should be removed.
- Either the contact party ID or the contact party number is required.
- Either the account party ID or the account party number is required.

Examples

- Example 1: Party ID is used for creating self-service users

  ```
  AccountPartyId,ContactPartyId,RelationshipTypeCd,RequestTypeCd
  300100110957452,300100156316610,ORA_CSS_USER&ORA_CSS_ACC_ADMIN,ORA_CSS_REQ_TYPE_CONTACT
  ```
- Example 2: Party Number is used for creating self-service users

  ```
  AccountPartyNumber,ContactPartyNumber,RelationshipTypeCd,RequestTypeCd
  CDRM_67617,CDRM_743628,ORA_CSS_USER,ORA_CSS_REQ_TYPE_CONTACT
  CDRM_67617,CDRM_743711,ORA_CSS_USER&ORA_CSS_ACC_ADMIN,ORA_CSS_REQ_TYPE_CONTACT
  CDRM_67617,CDRM_743651,ORA_CSS_USER &ORA_CSS_ACC_MGR,ORA_CSS_REQ_TYPE_CONTACT
  ```
- Example 3: Login ID is explicitly provided for creating self-service users

  ```
  AccountPartyNum,ContactPartyNum,LoginId,RelationshipTypeCd,RequestTypeCd
  CDRM_67617,CDRM_743628,Mary.Smith,ORA_CSS_USER,ORA_CSS_REQ_TYPE_CONTACT
  CDRM_67617,CDRM_743711,John.Rogers,ORA_CSS_USER&ORA_CSS_ACC_ADMIN,ORA_CSS_REQ_TYPE_CONTACT
  CDRM_67617,CDRM_743651,Pat.Williams,ORA_CSS_USER&ORA_CSS_ACC_MGR,ORA_CSS_REQ_TYPE_CONTACT
  ```
- Example 4: Consumer request type is provided for creating self-service users

  ```
  ContactPartyId,RelationshipTypeCd,RequestTypeCd
  300100194440555,ORA_CSS_USER,ORA_CSS_REQ_TYPE_CONSUMER
  ```
- Example 5: RoleId is provided for deleting self-service users

  ```
  300100194434646
  ```

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Self-Service Role**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Self-Service Role from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.

5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Self-Service Role**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Service Profile Data

You can use Import Management to create update or delete Service Profile records.

To import Service Profile records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Service Profile data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Service Profile Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Service Profile records, required attributes for updating or deleting Service Profile records, prerequisite setup tasks for the attributes, and specific validations, if any, for Service Profile import:

Attributes	Description	Prerequisite Setup Task/Import Validation	Creating a Service Profile record	Updating a Service Profile record	Deleting a Service Profile record
PartySiteId	The site address of the service profile.	The value must exist in the HZ_PARTY_SITES table, column PARTY_SITE_ID. The PARTY_SITE_ID should be child record of CUSTOMER_PARTY_ID.	Required. Either PartySiteId or PartySiteNumber is required	Not Required	Not Required
CustomerPartyId	The customer having the service profile.	The value must exist in the HZ_PARTIES table, column PARTY_ID.	Required. Either CustomerPartyId or CustomerPartyNumber is required	Not Required	Not Required
ServiceProfileId	The unique identifier of the service profile.	A valid primary key in the destination system. Either the ServiceProfileNumber or the ServiceProfileId should be entered. If both are entered, the ServiceProfileId is preferred.	Not Required	Conditionally Required. Provide value if the ServiceProfileNumber isn't provided.	Conditionally Required. Provide value if the ServiceProfileNumber isn't provided.

ServiceProfileNumber	The PUID of the service profile.	A valid unique PUID for the Service Profile in the destination system.	Required. If not passed it will be defaulted to PartySiteNumber of the PartySiteId	Conditionally Required. Provide value if the ServiceProfileId isn't provided.	Conditionally Required. Provide value if the ServiceProfileId isn't provided.
ServiceProfileName	The name of the service profile.	User defined name for the Service Profile.	Required. If not passed, it will be defaulted to <Customer Name> (<PartySiteNumber>).	Optional	Optional
StatusCd	Indicates whether the service profile is active.	A valid value is required.	Required. If not passed, it will be defaulted to ORA_SVC_ACTIVE.	Optional Pass ORA_SVC_INACTIVE to set the status to Inactive.	Not Required
StripeCd	Indicates the type of service implementation for the service profile. For example, CRM or Internal Help Desk service profile.	A valid value is required.	Required. If not passed, it will be defaulted to ORA_SVC_CRM.	Not Required	Not Required
TypeCd	The type of service profile.	A valid value is required.	Required. If not passed, it will be defaulted to ORA_SVC_SITE.	Not Required	Not Required
PartySiteNumber	The PUID of the service profile site address.	The value must exist in the HZ_PARTY_SITES table, column PARTY_SITE_NUMBER.	Required. Either PartySiteId or PartySiteNumber is required	Not Required	Not Required
CustomerPartyNumber	The PUID for the customer party of the service profile.	The value must exist in the HZ_PARTIES table, column PARTY_NUMBER.	Required. Either CustomerPartyId or CustomerPartyNumber is required	Not Required	Not Required
BillToCustomerId	The customer to be billed for work performed for the service profile.	The value must exist in the HZ_PARTIES table, column PARTY_ID.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required
BillToCustomerPartyNu	The PUID for the customer to be billed for work performed for the service profile.	The value must exist in the HZ_PARTIES table, column PARTY_NUMBER.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required
BillToCustomerAccount	The customer account to be billed for work performed for the service profile.	The unique identifier of the BillingCustomerAccoun and should belong to BillingAccount.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required
BillToCustomerAccount	The PUID for the customer account to be billed for work	The public unique identifier of the BillingCustomerAccoun	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required

	performed for the service profile.	and should belong to Billing Account.			
BillToCustomerAccount	The customer account site to be billed for work performed for the service profile.	The unique identifier of the BillingCustomerAccoun and should belong to BillingCustomerAccoun	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required
BillToPartySiteId	The party site to be billed for work performed for the service profile.	The unique identifier of the Billing PartySiteId.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required
BillToPartySiteNumber	The PUID for the party site that will be billed for work performed for the service profile.	The public unique identifier of the Billing PartySiteNumber.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required
PrimaryContactPartyId	The primary contact of the service profile.	The value must exist in the HZ_PARTIES table of Contact PartyType, column PARTY_ID.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not required
PrimaryContactPartyNu	The party number of the service profile primary contact.	The public unique identifier of the PrimaryContactPartyId.	Conditionally required A valid value is required if passed.	Conditionally required A valid value is required if passed.	Not Required

You can view the Service Profile object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Service Profile** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Service Profile** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Your Service Profile Contact Data

You can use Import Management to create, update, or delete a Service Profile Contact record.

To import Service Profile Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Service Profile Contact data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new cases or are updating cases that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Service Profile Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Service Profile Contact records, required attributes for updating or deleting Service Profile Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Service Profile Contact import:

Attributes	Description	Prerequisite Setup Task/Import Validation	Creating a Service Profile Contact record	Updating a Service Profile Contact record	Deleting a Service Profile Contact record
SpContactId	The unique identifier of the service profile contact.	A valid primary key in the destination system.	Not Required	Required	Required
ServiceProfileId	The service profile for the service profile contact.	The value must exist in the SVC_SERVICE_PROFILES, column SERVICE_PROFILE_ID.	Required. Provide value if the ServiceProfileNumber isn't provided.	Not Required	Not Required
ServiceProfileNumber	The PUID of the service profile for the service profile contact.	The public unique identifier of the ServiceProfileId.	Required. Provide value if the ServiceProfileId isn't provided.	Not Required	Not Required
PartyId	The contact for the service profile contact.	The value must exist in the HZ_PARTIES table of Contact PartyType, column PARTY_ID.	Required. Provide value if the ContactPartyNumber isn't provided.	Not Required	Not Required
ContactPartyNumber	The PUID of the contact belonging to the service profile.	The public unique identifier of the PartyId.	Required. Provide value if the PartyId isn't provided.	Not Required	Not Required

You can view the Service Profile Contact object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Service Profile Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **Create Import Activity** in the **Manage Imports page**.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Service Profile Contact** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue.**
2. Click **All Imports** and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

How do I import service request data?

You can use the Import Management to create, update, or delete service request records.

You can import service request records using these steps:

1. Map your source service request data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the service request data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your service request data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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

To better manage your service request information, the service request object has the following child object:

- Service Request Reference

If you want to import only a few records, then you can create a single CSV file for all service request attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the service request child objects. Note that you must have imported the CSV file for service request object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new service requests or are updating service requests that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Service Request Object

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

This table lists the required attributes for service request records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request record	Updating an Existing Service Request record
Account ID	The unique Id for the existing account Id record in the Oracle Fusion destination table.	Do not provide a value if creating a new service request. If updating an existing service request, the value must exist in the SVC_SERVICE_REQUESTS table, column ACCOUNT_PARTY_ID.	Not required	Conditionally required A value is required if you're updating an existing Account ID.
AssetID	The unique internal ID for the existing service request record..	Do not provide a value if creating a new service request. If updating an existing service request, the value must exist in the ZCA_ASSET table, column ASSET_ID.	Not required	Conditionally required A value is required if you're updating an existing service request for this service request.
Business Unit	The unique ID of the business unit name associated with the service request.	No validation	Required	Required
Category ID	Unique ID of a means of grouping service objects to enable easy identification and downstream reporting.	If providing a value, the value must exist in the table SVC_SR_CATEGORIES (CATEGORY_ID).	Not required	Conditionally required A value is required if you're updating an existing Category ID for this service request.
Inventory Item ID	The unique internal Id for the existing sales catalog product (item) record.	If providing a value, the value must exist in the EGP_SYSTEM_ITEMS_B	Conditionally required	Conditionally required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request record	Updating an Existing Service Request record
		table, column INVENTORY_ITEM_ID. The identified product must be defined for the sales catalog (QSC_PROD_GRP_ITEMS_TREE_V view). You can obtain the InventoryItemId for an existing product (item) by exporting the Product Group Products object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes You can add products (items) to the sales catalog. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Product Groups	A value is required if you're creating a new item inventory.	A value is required if you're updating an item inventory and you're not providing the product's ID (InventoryItemId).
Inventory Organization ID	The unique internal Id for the existing product item organization's record in the destination table.	If providing a value, the value must exist in the EGP_SYSTEM_ITEMS_B table, column ORGANIZATION_ID. The identified item organization must be the same organization defined for profile QSC_SALES_PRODUCTS_INVENTORY_ORG_ID. You can view the profile value. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Product Groups Profile Option Values You can obtain the InventoryOrgId for an existing product (item) by exporting the Product	Conditionally required A value is required if you're creating a new item inventory.	Conditionally required A value is required if you're updating an item inventory and you're not providing the product's ID (InventoryItemId).

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request record	Updating an Existing Service Request record
		Group Products object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes		
Partner Account Party ID	Foreign key that references HZ_PARTIES (PARTY_ID).	Do not provide a value if creating a new partner account in the same import batch as this additional party name. If you provide the value for an existing party, the value must exist in the HZ_PARTIES table, column PARTY_ID. You can obtain the PARTY_ID for an existing party by exporting the Party object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes	Not required	Conditionally required A value is required if you're updating an existing Partner Account for this service request.
PartyID	The unique ID for the existing party record in the Oracle Fusion destination table.	Do not provide a value if creating a new party in the same import batch as this additional party name. If you provide the value for an existing party, the value must exist in the HZ_PARTIES table, column PARTY_ID. You can obtain the PARTY_ID for an existing party by exporting the Party object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export	Not required	Conditionally required A value is required if you're updating an existing party ID and you're not providing the party ID.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request record	Updating an Existing Service Request record
		• Task: Manage Bulk Data Export, Schedule Export Processes		
Primary Contact ID	The initial reported by contact and ongoing primary customer contact of the service request.	Do not provide a value if creating a new Primary Contact Id in the same import batch as this additional party name. If you provide the value for an existing primary contact, the value must exist in the HZ_PARTIES table, column PARTY_ID. You can obtain the PARTY_ ID for an existing party by exporting the Party object. Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes	Not required	Conditionally required A value is required if you're updating an existing Primary Contact ID for this service request.
Reference Number	The unique number used to identify a service request. You can configure the service request number to a format that's best suitable to your organizational requirements.	No validation	Not required	Conditionally required A value is required if you're updating an existing reported by record and you're not providing the service request ID.
Service Request ID	The unique Id for the existing Service Request record in the Oracle Fusion destination table.	No validation	Not required	Conditionally required A value is required if you're updating an existing Service Request Id and you're not providing the Service Request Number.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the service request object. The page also lists attribute information like type, length, description, and so on.

> **Note:** When importing closed SRs, the ClosedDate and LastResolvedDate are set to the current date (instead of the dates in the import file) if there is an update to the status or description of the SR. As a workaround, you can import the SRs again to take the ClosedDate and LastResolvedDate from the import file.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Service Request** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the service request information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Service Request from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Service Request Contact Data

You can use Import Management to create or update Service Request Contact records.

To import Service Request Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Service Request Contact data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new service request contacts or are updating service request contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Service Request Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Service Request Contact records, required attributes for updating Service Request Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Service Request Contact import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request Contact Record	Updating an Existing Service Request Contact Record
MemberId	The unique ID for the Service Request (SR) Contact record in the Service Request Contact object.	Auto-generated	Not Required	Conditionally required While updating the SR contact record, if the SRId and either one of the PartyID or ContactPartyNumber aren't provided, then the MemberId is required.
PartyId	The unique party identifier of the contact.	If a value is provided to create a new SR contact record or update an existing SR contact record, then the value must exist in the column PARTY_ID of the HZ_PARTIES table.	Conditionally required A value is required if a new contact is added to a service request, and the Contact Party Number (public unique identifier of the contact) isn't provided.	Conditionally required A value is required if an SR contact record is updated, and the Contact Party Number isn't provided.
ContactPartyNumber	The public unique identifier of the contact.	If a value is provided to create a new SR contact record or update an existing SR contact, the value must exist in the column PARTY_NUMBER of the HZ_PARTIES table.	Conditionally required A value is required if a new contact is added to a service request, and the Party Id isn't provided.	Conditionally required A value is required if an SR contact record is updated, and the Party Id isn't provided.
ContactPartyName	The name of the contact.	No Validation	Not Required	Not Required
SrId	The service request to which the contact is associated.	If a value is provided to create or update an SR contact record, then the value must exist in the column SR_ID of the SVC_SERVICE_REQUESTS table.	Conditionally required A value is required if an SR contact record and the SR Number isn't provided.	Conditionally required A value is required if an existing SR contact record is updated, and the SR Number isn't provided.
SrNumber	The public unique identifier of a service request.	No Validation If a value is provided to create or update an SR contact record, the value must exist in the SR_NUMBER column of the SVC_SERVICE_REQUESTS table.	Conditionally required A value is required if an SR contact record is created and the SRId isn't provided.	Conditionally required A value is required if an existing SR contact record is updated and the SRId isn't provided.

You can view the Service Request Contact 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Service Request Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Service Request Contact**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Service Request Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**

   You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
5. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
6. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Service Request Contact**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Service Request Message Communication Data

You can use the Import Management to create Service Request (SR) message communication records.

You can import message communication records using these steps:

1. Map your source message data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the message communication data you want to import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

To import your message communication data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records. Make sure that you have imported SR and SR Messages before importing the message communication records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Required Attributes and Validations for Message Object

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

This table lists the required attributes for message communication records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Message Communication record
MessageNumber	The public unique identifier of the service request message.	None	Conditionally Required. Either pass value for MessageNumber of ObjectId.
ChannelId	The unique identifier of the channel.	None	Required
Object ID	ID of the object (such as Note, Defect, Other SR) referencing the service request or referenced by the service request.	No validation	Conditionally required. Provide value for either ChannelId or ChannelShortName.
ChannelShortName	The public unique identifier of the channel.	No validation	Conditionally required. Provide value for either ChannelId or ChannelShortName.
PartyId	The unique party identifier of the person being communicated with.	No Validation	Conditionally required. Either pass PartyId or PartyNumber if you want to capture the message recipient or sender.
PartyNumber	The public unique identifier of the contact associated with the service request message.	No validation	Conditionally required. Either pass PartyId or PartyNumber if you want to capture the message recipient or sender.
PartyViaEndPoint	The endpoint used to communicate with the customer contact. For example Primarily used for Email.	No validation	Conditionally required. Provide value if you want to capture the email address of the message recipient.
RoutingCd	The code indicating how the message was routed through the endpoint.	No Validation	Conditionally required if you want to capture the sender or recipient of the message. Valid values are: ORA_SVC_BCC, ORA_SVC_CC, ORA_SVC_FROM, ORA_SVC_TO
ObjectId	The unique identifier of the object.	No validation	Conditionally Required. Either pass value for MessageNumber of ObjectId.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the message communication object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Service Request Message Communication** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the message communication information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Service Request Message Communication from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Service Request Reference Data

You can use the Import Management to create, update, or delete service request reference records.

You can import service request reference records using these steps:

1. Map your source service request reference data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the service request reference data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your service request reference data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new service request references or are updating service request references that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Service Request Reference Object

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

This table lists the required attributes for service request reference records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request Reference record	Updating an Existing Service Request Reference record
Article ID	References CSO_ CONTENT_TEXT (ANSWER_ID) which uniquely identifies the specific version of the article.	If the article Id is empty, the object Id must have a value.	Conditionally required A value is required if you're creating a new reference Id record.	Conditionally required A value is required if you're updating an existing reference Id record and you're not providing the record's unique ID (ReferenceId).
Article Locale	Specifies locale of the document, such as en_US.	No validation	Conditionally required A value is required if you're creating a new reference Id record.	Conditionally required A value is required if you're updating an existing reference Id record and you're not providing the record's unique Id (ReferenceId).
Object ID	Id of the object (such as Note, Defect, Other SR) referencing the service request or referenced by the service request.	If the object Id is empty, the article Id must have a value.	Conditionally required A value is required if you're creating a new reference Id record.	Conditionally required A value is required if you're updating an existing reference Id record and you're not providing the record's unique Id (ReferenceId).
Object Type	Indicates the type of object (such as Note, Article, Defect, Other SR) in reference to SR_ID.	If providing a value, it must be ORA_SVC_ARTICLE.	Conditionally required A value is required if you're creating a new reference Id record.	Conditionally required A value is required if you're updating an existing reference Id record and you're not providing the record's unique Id (ReferenceId).
Reference ID	Unique Id for reference	No validation	Not required	Conditionally required A value is required if you're updating an existing reference Id and you're not providing the object Id (objectId) or (article Id, object type code and article locale), or (Article Id, Object Type and Article Locale).

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request Reference record	Updating an Existing Service Request Reference record
Relation Type	Indicates the type of relationship (for example, Related SR).	No validation	Required	Required
Service Request ID	Service request to which the reference belongs.	No validation	Not required	Conditionally required A value is required if you're updating an existing contact and you're not providing the Service Request Number.
SR Number	The unique number used to identify a service request. You can configure the service request number to a format that's best suitable to your organizational requirements.	No validation	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID.	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID.
Title	If an article or note is linked to the service request, this is the title of the article.	No validation	Required	Required

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the service request reference object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Service Request Reference** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the service request reference information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Service Request Reference from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Service Request Resource Data

You can use the Import Management to create or update service request resource records.

You can import service request resource records using these steps:

1. Map your source service request resource data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Check the import results.

How You Map Your Source Data to Target Object Attributes

To import your service request resource data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 Service Request Resource object, the attributes are MemberID, ServiceRequestID, and ServiceRequestTeamMemberResourceID.
- 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 Service Request Resource object, the attributes are ResourceNumber and ServiceRequestNumber.

Required Attributes and Validations for Service Request Resource Object

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

This table lists the required attributes for importing new Service Request Resource records, required attributes for updating Service Request Resource records, prerequisite setup tasks for the attributes, and specific validations, if any for Service Request Resource import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request Resource record	Updating an Existing Service Request Resource record
Member ID	The unique ID for the existing member record in the Oracle Fusion destination table.	This is auto generated.	Not required	Conditionally required A value is required if you're updating an existing Member ID and you're not providing the Service Request Id and Party Id (PartyId and SrId).
ResourceNumber	Unique resource number that identifies the party Id.	If providing a value to update an existing service request resource, the value must exist in the HZ_ PARTIES table, column PARTY_NUMBER.	Conditionally required A value is required if you're creating a service request resource record and not providing the Service Request Team Member Resource ID.	Conditionally required A value is required if you're adding a new resource to a service request or updating an existing service request resource record and you're

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Service Request Resource record	Updating an Existing Service Request Resource record
				not providing the record's unique Id (PartyId).
Service Request ID	Specifies the service request to which the service request resource member belongs.	No validation	Conditionally required A value is required if you're creating a service request resource record and not providing the service request number.	Conditionally required A value is required if you're updating an existing service request team and you're not providing the service request number (the public unique identifier of the service request).
Service Request Team Member Resource ID	The unique Id of the resource being added/ updated to the service request team.	If providing a value to update an existing account, the value must exist in the HZ_PARTIES table, column PARTY_ID.	Conditionally required A value is required if you're adding a new resource to a service request and you're not providing the Resource Number (public unique identifier of the resource).	Conditionally required A value is required if you're adding a new resource to a service request or updating an existing service request resource record and you're not providing the record's public unique Id (Party Number).
Name	The name of the resource added as the service request resource member.	No validation	Not required	Not required
Service Request Number	The unique number used to identify a service request. You can configure the service request number to a format that's best suitable to your organizational requirements.	No validation	Conditionally required A value is required if you're adding a record and you're not providing the service request ID.	Conditionally required A value is required if you're updating an existing record and you're not providing the Service Request ID.
Assigned To	Specifies the resource to which the service request is assigned.	No validation If the service request is assigned to the resource, this field can be set to Y.	Not required	Not required

You can view the Service Request Resource 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.

2. Select the **Service Request Resource** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the service request resource information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Service Request Resource from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your SmartText Data

You can use Import Management to create, update, or delete SmartText records.

To import SmartText records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your SmartText data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure any prerequisite setups are completed.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "Id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 SmartText object, this attributes is StdTxtId.
- Public unique identifiers: If you are creating new records, then you can provide a user-friendly public unique identifier (PUID) which is an attribute denoted with 'Number'. For the SmartText object, the attribute is StdTxtUniqueNumber. If you update a record for which you have previously provided a StdTxtUniqueNumber, you can use the StdTxtUniqueNumber attribute to identify the record.

Required Attributes and Validations for SmartText Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new SmartText records, required attributes for updating SmartText records, prerequisite setup tasks for the attributes, and specific validations, if any, for SmartText import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Smart Text Record	Updating an Existing Smart Text Record
StdTxtId	The unique Id for the existing SmartText record in the Oracle Fusion destination table.	Number	18	No Validation	Not required	Conditionally required A value is required if you're updating an existing Smart Text and you're not providing the Standard Text Unique Number.
StdtxtName	Name of the SmartText	Varchar	50	Validation is performed for the creation of a SmartText to ensure the following combination of values doesn't exist: • StdtxtName • Registry ID • Domain • StripeCd • BuOrgId	Required	Not required
StdTxtUniqueNumb	The public unique identifier (PUID) used to identify a SmartText. You can configure the standard text unique number to a format that is most suitable to the need of your organization.	Varchar	30	Validation performed for the creation of a smarttext, ensuring the smart text unique number isn't already in use.	Not required You can accept system generated values or provide a unique value according to your organizational business needs.	Conditionally required A value is required if you're updating an existing Smart Text and you're not providing the Smart Text Identifier (`StdTxtId`).
StripeCd	The stripe to which this SmartText is associated	Varchar	30	A value is defaulted based on the application context. However, if a value is populated, validation is performed against the list of valid values in the lookup type ORA_SVC_STRIPE_CD.	Not Required A value is defaulted based on the application context.	Not required
HtmlFlag	A Y/N value indicating if the	Varchar	1	A default value of "N" is provided. If a	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Smart Text Record	Updating an Existing Smart Text Record
	SmartText contains HTML.			value is populated, validation is performed against the list of valid values in the lookup type YES_ NO.	The value "N" is defaulted, if no value is provided.	
Scope	Indicates if the SmartText is private or public	Varchar	20	A default value of "ORA_SVC_USER" is provided. If a value is populated, validation is performed against the list of valid values in the lookup type ORA_ SVC_STDTXT_ SCOPE_CD.	Not required The value "ORA_ SVC_USER" is defaulted, if no value is provided.	Not required
Domain	Specifies the domain to which the SmartText is assigned	Varchar	30	No default value is provided. If a value is populated, validation is performed against the list of valid values in the lookup type ORA_ SVC_STDTXT_ DOMAIN_CD.	Not required	Not required
Object	Specifies the business object to which the SmartText is associated.	Varchar	150	No default value is provided. The value provided should be a value of the VIEW_OBJECT_ CODE from the SVC_STD_TXT_ OBJECTS table. For instance, ServiceRequestVO.	Required	Not required
StartDate	Allows you to specify a date when the SmartText is valid.	Date		The system date is used, if no value is specified.	Not required	Not required
EnabledFlag	Specifies if the SmartText is available for use.	Varchar	1	A default value of "Y" is provided. If a value is populated, validation is performed against the list of valid values in the	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Smart Text Record	Updating an Existing Smart Text Record
				lookup type YES_NO.		
UserPartyId	The foreign key value to the Parties table	Number	18	Import any new parties into the database.	Conditionally Required. If the Scope is set to ORA_SVC_USER, either the UserPartyId or the Registry ID is required.	Not required
Registry ID	This is the public unique identifier of the user assigned to this private SmartText.	Varchar	30	Import any new parties into the database.	Conditionally Required. If the Scope is set to ORA_SVC_USER, either the UserPartyId or the Registry ID is required.	Not required
Folder ID	The foreign key value to the SmartText folders table	Number	18	Import any new SmartText folders into the database.	Conditionally Required. If the Scope is set to ORA_SVC_GLOBAL, either the Folder ID or the FolderUniqueNumb is required.	Not required
FolderUniqueNumb	This is the public unique identifier of the user assigned to the folder of this SmartText.	Varchar	30	Import any new SmartText folders into the database.	Conditionally Required. If the Scope is set to ORA_SVC_GLOBAL, either the Folder ID or the FolderUniqueNumb is required.	Not required
BuOrgId	This is the business unit organization Id. If multiple business unit support is enabled using the HZ_ENABLE_MULTIPLE_BU_CRM profile option, this value will allow segregation of data accordingly.	Number	18	No Validation	Not Required A value is defaulted based on the application context.	Not Required A value is defaulted based on the application context.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Smart Text Record	Updating an Existing Smart Text Record
Text	This is the text of the SmartText record.	Long Text		No Validation	Required	Not required
Language	This is the language code for which the text is associated.	Varchar	4	No Validation The value must exist in the LANGUAGE_CODE from FND_LANGUAGES_VL.	Required	Not required

You can view the SmartText object and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, and description on this page.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **StandardText** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select StandardText from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You will see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** to complete the request.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your SmartText Folder Data

You can use Import Management to create or update SmartText Folder records.

To import SmartText Folder records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your SmartText Folder data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure any prerequisite setups are completed.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "Id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 StandardTextFolder object, this attribute is Folder ID.
- Public unique identifiers: If you are creating new records, then you can provide a user-friendly public unique identifier (PUID) which is an attribute denoted with 'Number'. For the SmartText object, the attribute is FolderUniqueNumber. If you update a record for which you have previously provided a FolderUniqueNumber, you can use the FolderUniqueNumber attribute to identify the record.

Required Attributes and Validations for SmartText Folder Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new SmartText Folder records, required attributes for updating SmartText Folder records, prerequisite setup tasks for the attributes, and specific validations, if any, for SmartText Folder import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a SmartText Folder Record	Updating an Existing SmartText Folder Record
FolderId	The unique Id for the existing SmartText Folder record in the Oracle Fusion destination table.	Number	18	No Validation	Not required	Conditionally required A value is required if you're updating an existing SmartText Folder and you're not providing the Folder Unique Number.
ParentId	The Folder ID of the parent folder	Number	18	No Validation	Not required If populated, this can be used instead of ParentFolderUnique	Not required
Name	Name of the SmartText Folder	Varchar	50	Validation is performed for the creation of a SmartText folder to ensure the following	Required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a SmartText Folder Record	Updating an Existing SmartText Folder Record
				combination of values doesn't exist: • Name • UserPartyID • Domain • StripeCd • BuOrgId		
FolderUniqueNumb	The unique number used to identify a SmartText folder. You can configure the folder unique number to a format that's best suitable to your organizational requirements.	Varchar	30	Validation is performed for the creation of a SmartText folder, ensuring the folder unique number isn't already in use.	Not required You can accept system generated values or provide a unique value according to your organizational business needs.	Conditionally required A value is required if you're updating an existing SmartText Folder and you're not providing the SmartText Folder Identifier (`FolderId`).
ParentFolderUnique	The unique number used to identify a Parent SmartText Folder.	Varchar	30	Validation is performed for the creation of a SmartText Folder, ensuring the Parent SmartText Folder unique number is a valid Folder Unique Name.	Not required If populated, this can be used instead of ParentFolderId.	Not required
StripeCd	The stripe to which this SmartText folder is associated	Varchar	30	A value is defaulted based on the application context. However, if a value is populated, validation is performed against the list of valid values in the lookup type ORA_SVC_STRIPE_CD.	Not Required A value is defaulted based on the application context.	Not required
Domain	Specifies the domain to which the SmartText folder is assigned	Varchar	30	No default value is provided. If a value is populated, validation is performed against the list of valid values in the	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a SmartText Folder Record	Updating an Existing SmartText Folder Record
				lookup type ORA_SVC_STDTXT_DOMAIN_CD.		
BuOrgId	This is the business unit organization ID. If multiple business unit support is enabled using the HZ_ENABLE_MULTIPLE_BU_CRM profile option, this value will allow segregation of data accordingly.	Number	18	No Validation	Not Required A value is defaulted based on the application context.	Not Required A value is defaulted based on the application context.

You can view the StandardTextFolder object and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, and description on this page.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **StandardTextFolder** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select StandardTextFolder from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** to complete the request.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your SmartText User Variable Data

You can use Import Management to create, update, or delete SmartText User Variable records.

To import SmartText User Variable records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your SmartText User Variable data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure any prerequisite setups are completed.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "Id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications 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 SmartText User Variable object, this attributes is VariableId.
- Public unique identifiers: If you are creating new records, then you can provide a user-friendly public unique identifier (PUID) which is an attribute denoted with 'Number'. For the SmartText object, the attribute is VariableUniqueNumber. If you update a record for which you have previously provided a VariableUniqueNumber, you can use the VariableUniqueNumber attribute to identify the record.

Required Attributes and Validations for SmartText User Variable Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new SmartText User Variable records, required attributes for updating SmartText User Variable records, prerequisite setup tasks for the attributes, and specific validations, if any, for SmartText User Variable import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a SmartText User Variable Record	Updating an Existing SmartText User Variable Record
VariableId	The unique Id for the existing SmartText User Variable record in the Oracle Fusion destination table.	Number	18	No Validation	Not required	Conditionally required A value is required if you're updating an existing SmartText User Variable and you're not providing the Variable Unique Number.
Variable	Name of the SmartText User Variable	Varchar	50	Validation is performed for the creation of a SmartText user variable to ensure the following combination of values doesn't exist: • Variable • Context	Required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a SmartText User Variable Record	Updating an Existing SmartText User Variable Record
				• StripeCd • BuOrgId		
VariableUniqueNum	The unique number used to identify a SmartText user variable. You can configure the variable unique number to a format that's best suitable to your organizational requirements.	Varchar	30	Validation performed for the creation of a SmartText user variable, ensuring the SmartText user variable unique number isn't already in use.	Not required You can accept system generated values or provide a unique value according to your organizational business needs.	Conditionally required A value is required if you're updating an existing SmartText User Variable and you're not providing the SmartText User Variable Identifier (`VariableId`).
StripeCd	The stripe to which this SmartText user variable is associated	Varchar	30	A value is defaulted based on the application context. However, if a value is populated, validation is performed against the list of valid values in the lookup type ORA_ SVC_STRIPE_CD.	Not Required A value is defaulted based on the application context.	Not required
Object	Specifies the business object to which the SmartText user variable is associated.	Varchar	30	No default value is provided. The value provided should be a value of the VIEW_OBJECT_ CODE from the SVC_STD_TXT_ OBJECTS table. For instance, ServiceRequestVO.	Not required	Not required
Context	Specifies the context to which the SmartText user variable is associated.	Varchar	50	A default value of ORA_SVC_ SR is provided. However, if a value is populated, validation is performed against the list of valid values in the lookup type ORA_ SVC_STDTXT_ TYPE_CD.	Not required	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a SmartText User Variable Record	Updating an Existing SmartText User Variable Record
BuOrgId	This is the business unit organization ID. If multiple business unit support is enabled using the HZ_ENABLE_ MULTIPLE_BU_ CRM profile option, this value will allow segregation of data accordingly.	Numver	18		Not Required A value is defaulted based on the application context.	Not Required A value is defaulted based on the application context.

You can view the StandardTextUserVariable object and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, and description on this page.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **StandardTextUserVariable** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select StandardTextUserVariable from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** to complete the request.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Source System Reference Data

You can use Import Management to create or update Source System Reference records.

To import Source System Reference records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Source System Reference data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred options for uniquely identifying an object record are as follows:

- Internal ID: If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Source System References. You can determine the internal ID of a record by exporting Oracle Applications 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 Source System Reference object, the attributes are SourceSystemReferenceId and PartyId.
- 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 Source System Reference object, the attribute is PartyNumber.

Required Attributes and Validations for Source System Reference Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Source System Reference records, required attributes for updating Source System Reference records, prerequisite setup tasks for the attributes, and specific validations, if any, for Source System Reference import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Source System Reference Record	Updating an Existing Source System Reference Record
SourceSystemRefer	Source system reference identifier. This is a primary key.	Number	18	No validation	Not required	If you can export the existing source system reference, provide this primary key to identify the record for further updates.
SourceSystem	Original source system name	Varchar	30	This has to be in HZ_ORIG_SYSTEMS_B with status "A".	Provide a valid value.	Not required
SourceSystemRefer	Identifier in the original source system.	Varchar	255	No validation	Provide a valid value.	Not required
Status	Denotes either ACTIVE or INACTIVE	Varchar	1	No validation	Not required	Not required
StartDate	Start date of the source system reference in the source system.	Date		No validation	If you don't provide a value, it defaults to the current date.	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Source System Reference Record	Updating an Existing Source System Reference Record
EndDate	End date of the source system reference in the source system.	Date		No validation	If you don't provide a value, it defaults to 12/31/4712.	Not required
PartyId	Party identifier to which the source system reference is associated	Number	18	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartyNumber	Party's PUID to which the source system reference is associated	Varchar	30	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
Party Source System	Specifies the original source system of the party	Varchar	30	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
Party Source System Reference Value	Specifies the party's source system reference	Varchar	255	No validation	Provide one of the following :	Not required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Source System Reference Record	Updating an Existing Source System Reference Record
	in the original source system				• PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	

You can view the Source System Reference 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.

> **Note:** To directly update the SourceSystemReferenceValue field, you must use the SourceSystemReferenceId as the record identifier.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Source System Reference** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Source System Reference from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

You can use the following steps to inactivate origin system and origin system reference for the source system reference object:

1. Create a source CSV file with values for the attributes SourceSystem, SourceSystemReferenceValue, and SourceSystemReferenceId. You can find the values for these attributes by exporting the source system reference object records using Export Management.
2. Create an import activity using the object Source System and the import mode Delete records.
3. If required, map the attributes on the **Map Fields** page, and submit the import activity.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

How do I import subscription data?

You can use import management to create or update Subscription records.

To import Subscription records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription object, the attributes are SubscriptionNumber, ExemptCertificateNumber, and BillToAccountNumber.

Required Attributes and Validations for Subscription Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription records, required attributes for updating Subscription records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
ChargeDefinition	The definition that indicates the purpose of the charge.	This must be setup in Fusion Pricing.	Required	Not Required
DefinitionOrganizationId	The item master organization	This must be a valid ORGANIZATION_ID from the HR_ALL_ORGANIZATION_UNITS_F table.	Not required	Not required
PartialPeriodType	The partial period type. The values might be actual or fixed.	Lookup: ORA_OSS_PERIOD_TYPE	Not required	Not required
PartialPeriodStart	The partial period start. The values might be calendar or service.	Lookup: ORA_OSS_PERIOD_START	Not required	Not required
SubscriptionId	The subscription ID	This is automatically generated when the record is created.	Not required	Not required
BusinessUnitId	The business unit ID	This must be a valid business unit ID.	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
LegalEntityId	The legal entity ID	This must be value record as per GL_LEDGER_LE_V.	Required	Not required
SubscriptionProfileId	The subscription profile ID	This must be a valid subscription profile ID - OSS_SUBSCRIPTION_PROFII	Required	Not required
PrimaryPartyId	The primary party ID	Lookup: HZ_PARTIES	Required	Not required
Currency	The subscription currency.	This must be a valid currency.	Required	Not required
Status	The subscription status	This must be ORA_DRAFT or ORA_ACTIVE.	Required	Not required
AccountingRuleId	The accounting rule ID	RA_RULES.RULE_ID where TYPE in 'A','ACC_DUR', 'PP_DR_ALL', or 'PP_DR_PP'	Not required	Not required
TransactionTypeName	The accounts receivables transaction type name	This must be a valid transaction type name as per the RA_CUST_TRX_TYPES_ALL table.	Required	Not required
BillToAccountId	The bill-to account ID	HZ_CUST_ACCOUNTS.CUST_ACCOUNT_ID	Required	Not required
BillToSiteUseId	The bill-to site use ID	HZ_CUST_SITE_USES_ALL.SITE_USE_ID	Required	Not required
SubscriptionNumber	The subscription number	This must be a unique number. It can be an alphanumeric value. This serves as the PUID for the subscription.	Required	Required
ShipToPartySiteId	The ship-to part site ID	HZ_CUST_SITE_USES_ALL.SITE_USE_ID	Not required	Not required
ShipToSite	The ship-to site	HZ_CUST_SITE_USES_ALL.SITE_USE_ID	Not required	Not required
PaymentMethod	The payment method	This must be ORA_PURCHASE_ORDER or ORA_WIRE.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
PaymentMethodName	The payment method name	This must be Purchase Order or Wire.	Not required	Not required
PaymentTermsName	The payment terms name	RA_TERMS_VL.NAME	Not required	Not required
TaxClassificationCode	The tax classification code	LOOKUP_TYPE: ZX_OUTPUT_ CLASSIFICATIONS	Not required	Not required
TaxClassificationMeaning	The tax classification meaning	LOOKUP_TYPE: ZX_OUTPUT_ CLASSIFICATIONS	Not required	Not required
ExemptCertificateNumber	The tax exempt certificate number	ZX_EXEMPTIONS_ V.EXEMPT_CERTIFICATE_ NUMBER	Not required	Not required
ExemptReason	The tax exempt reason code	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
ExemptReasonMeaning	The tax exempt reason meaning	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
TaxExemptionHandling	The tax exemption handling code	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
TaxExemptionHandlingNam	The tax exemption handling name	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
DocumentFiscalClassificatio	The document fiscal classification	ZX_FC_DOCUMENT_ FISCAL_ V.CLASSIFICATION_CODE	Not required	Not required
CustomerAcceptance	The customer acceptance	Lookup: ORA_OSS_CUST_ACCEPTAN - Values REQUIRED OR NOTREQUIRED	Not required	Not required
InternalApproval	The internal approval	Lookup: ORA_OSS_INT_ APPROVAL_OPTIONS	Not required	Not required
LayoutTemplate	The layout template	This must be a valid layout template setup in the BI publisher.	Not required	Not required
CommunicationChannel	The communication channel	Lookup: ORA_OSS_COMM_CHANNE	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
		- Values EMAIL, OFFLINE, ONLINE, CUSTOM		
PrimarySalesPerson	The primary sales person	This must be a valid sales person.	Not required	Not required
NegotiationLanguage	The negotiation language	fnd_languages_ vl.LANGUAGE_CODE	Not required	Not required
QuoteToContactId	The contact ID to which renewal quote is sent to	This must be a valid contact ID.	Not required	Not required
EnableRenewalRemindersFla	Check box for the enable renewal reminders	Y or N	Not required	Not required
RenewalProcess	Renewal Process	Lookup: ORA_OSS_ RENEWAL_TYPE	Not required	Not required
CurrencyConversionRate	The currency conversion rate	This must be valid as per GL_DAILY_CONVERSION_ TYPES.	Not required	Not required
CurrencyConversionRateTyp	The currency conversion rate type	This must be valid as per GL_DAILY_CONVERSION_ TYPES.	Not required	Not required
Duration	The subscription duration	This must be an integer.	Not required	Not required
Period	The subscription period	This must be a valid value from OSS_TIME_CODE_ UNITS.	Not required	Not required
EndDate	The end date of the subscription	This date must be equal to or later than the start date.	Not required	Not required
CloseReason	The close reason	Lookup: ORA_OSS_CLOSE_ REASONS	Not required	Not required
BusinessUnitName	The business unit name	This must be a valid business unit name.	Not required	Not required
LegalEntityName	The legal entity name	This must be valid as per the GL_LEDGER_LE_V table.	Not required	Not required
SubscriptionProfileName	The subscription profile name	This must be a valid subscription profile name.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
		OSS_SUBSCRIPTION_ PROFILE		
PrimaryPartyName	The primary party name	This must be a valid party name.	Not required	Not required
CurrencyName	The name of the subscription currency.	This must be a valid currency name.	Not required	Not required
RenewalSubscriptionProfileI	The renewal subscription profile ID	This must be a valid subscription profile ID - OSS_SUBSCRIPTION_PROFII	Not required	Not required
DefaultLanguage	The default language	fnd_languages_ vl.LANGUAGE_CODE	Not required	Not required
GenerateBillingSchedule	The check box for generating the billing schedule	Must be Y or N	Not required	Not required
TransactionType	The accounts receivables transaction type	This must be a valid transaction type as per the RA_CUST_TRX_TYPES_ALL table.	Not required	Not required
PricingSystem	The pricing system	ORA_OSS_FUSION, ORA_ OSS_THIRD_PARTY	Not required	Not required
RenewalCustomerAcceptanc	The renewal customer acceptance	This must either be REQUIRED or NOTREQUIRED.	Not required	Not required
RenewalInternalApproval	The renewal internal approval	This must either be REQUIRED or NOTREQUIRED.	Not required	Not required
RenewalPriceAdjustmentBas	The renewal price adjustment basis	Lookup: ORA_OSS_RNWL_PRICE_AD Value - ORA_NET_PRICE	Not required	Not required
RenewalPriceAdjustmentPer	The renewal price adjustment percentage	This must be a positive integer.	Not required	Not required
RenewalPriceAdjustmentTyp	The renewal price adjustment type	Lookup: ORA_OSS_RNWL_PRICE_AD Values - ORA_MARKUP, ORA_MARKDOWN, ORA_REPRICE	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
UsageCapture	The usage capture mode for the subscription	ORA_FUSION, ORA_THIRD_PARTY	Not required	Not required
ClosedDate	The date on which the subscription was closed.	This date must be later than the start date.	Not required	Not required
CloseCreditMethod	The close credit method	Lookup: ORA_OSS_CLOSE_CREDIT_METHOD	Not required	Not required
CancelReason	The reason for canceling the subscription	This must be a valid reason. Lookup: ORA_OSS_CANCEL_REASONS	Not required	Not required
CanceledDate	The date on which the subscription was canceled	This must be between the start date and the end date.	Not required	Not required
BillService	The bill service code	Lookup: ORA_OSS_BILL_SERVICE. Values could be ORA_DO_NOT_BILL, ORA_BILL, or ORA_BILL_ON_RENEWAL.	Not required	Not required
BillServiceName	The bill service option	Lookup: ORA_OSS_BILL_SERVICE. The values might be Do not bill, Bill, or Bill on renewal.	Not required	Not required
InvoicingRuleId	The invoicing rule ID	RA_RULES.RULE_ID where TYPE ='I'	Not required	Not required
InvoicingRuleName	The invoicing rule name	RA_RULES.NAME where TYPE ='I'	Not required	Not required
BillingDateCode	The billing date code	Lookup: ORA_OSS_BILLING_DATE	Not required	Not required
BillingDateName	The billing date name	Lookup: ORA_OSS_BILLING_DATE	Not required	Not required
BillingFrequency	The billing frequency code	oss_time_code_units.user_uom_code	Not required	Not required
BillingFrequencyName	The billing frequency name	oss_time_code_units.user_uom_code	Not required	Not required
AccountingRuleName	The accounting rule name	RA_RULES.NAME where TYPE in ('A','ACC_DUR', 'PP_DR_ALL','PP_DR_PP')	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Record	Updating an Existing Subscription Record
BillingSystem	The billing system	Lookup: ORA_OSS_ BILLING_SYSTEM	Not required	Not required
BillToAccountNumber	The bill-to account number	HZ_CUST_ ACCOUNTS.ACCOUNT_ NUMBER	Not required	Not required
BillToAccountDescription	The bill-to account description	Lookup: HZ_CUST_ ACCOUNTS	Not required	Not required
BillToAddress	The bill-to address	Lookup: HZ_CUST_SITE_ USES_ALL	Not required	Not required
ShipToParty	The ship-to party	Lookup: HZ_PARTIES	Not required	Not required
ShipToPartyName	The ship-to party name	Lookup: HZ_PARTIES	Not required	Not required

You can view the Subscription 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.

Note:

- To generate the billing schedule based on your pricing, set the **GenerateBillingSchedule** option to Yes and re-import the Subscription.csv file after all files have been imported. Also, to activate your subscription, you need to re-import the Subscription.csv file after importing all required files.

  Before generating the billing schedule through import make sure the imported subscription has charges in product's pricing tab. If there isn't any charge then you need to import the subscription product charge first and then generate the billing schedule.
- You can DELETE records for Subscription management while in DRAFT status.
- To create an included warranty, you need to set the value of `WarrantyYN` to Y. Included warranty can be imported only if the subscription is in Active status.
- To import subscription contracts and supporting documents see Import Your Attachment Data in the Related Topics section. The codes for attachment categories are OSS_SUBCSRIPTION_AGREEMENT for supporting documents and OSS_SUPPORTING_DOCUMENTS for subscription primary contract attachment.
- You can update usage quantity through import by passing `UsageAcquiredFlag` as Y. Don't pass `ListPrice`, `Amount`, and `UsagePricedFlag` attributes in your CSV file.
- When a Subscription is activated using Import management, the approval rules aren't triggered. You can trigger the approval rules in the UI.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?
- Import Your Attachment Data

Import Your Subscription Bill Adjustment Data

You can use import management to create or update Subscription Bill Adjustment records.

To import Subscription Bill Adjustment records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Bill Adjustment object, the attribute is SequenceNumber.

Required Attributes and Validations for Subscription Bill Adjustment Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Bill Adjustment records, required attributes for updating Subscription Bill Adjustment records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Bill Adjustment import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Bill Adjustment Record	Updating an Existing Subscription Bill Adjustment Record
BillAdjustmentId	The bill adjustment ID	Do not pass any value.	Not required	Not required
AdjustmentValue	The adjustment value	This must be a positive number.	Required	Not required
AdjustmentType	The adjustment type	ORA_DISCOUNT_AMOUNT, ORA_DISCOUNT_PERCENT, ORA_MARKUP_AMOUNT, ORA_MARKUP_PERCENT, ORA_PRICE_OVERRIDE	Required	Not required
AdjustmentBasis	The adjustment basis	ORA_LIST_PRICE, ORA_NET_PRICE	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Bill Adjustment Record	Updating an Existing Subscription Bill Adjustment Record
SequenceNumber	The adjustment sequence number	This must be a unique bill adjustment sequence number.	Not required	Not required
AutoAdjustmentFlag	Option indicating whether the subscription bill should be auto adjusted	Y or N	Required	Not required
BillLineId	The bill line ID	Do not pass any value.	Not required	Not required
BillLinePuid	The bill line PUID	This must be a valid bill line PUID.	Required	Not required
BillAdjustmentPuid	The bill line PUID	This must be a valid bill line PUID.	Required	Not required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required
SubscriptionProductId	The subscription product ID	Do not pass any value.	Not required	Not required
ChargeAdjustmentId	The charge adjustment ID	Do not pass any value.	Not required	Not required
Effectivity	The effectivity of the subscription bill adjustment	Do not pass any value.	Not required	Not required
NumberOfPeriods	The number of periods of adjustment	Do not pass any value.	Not required	Not required
PeriodFrom	The period from when the subscription bill adjustment starts	Do not pass any value.	Not required	Not required
PeriodUntil	The period till when the subscription bill adjustment is valid	Do not pass any value.	Not required	Not required
CurrencyCode	The currency code	Do not pass any value.	Not required	Not required
BasisEnableFlag	Option for basis enablement	Do not pass any value.	Not required	Not required

You can view the Subscription Bill Adjustment 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Bill Adjustment** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Bill Adjustment from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Charge Adjustment Data

You can use import management to create or update Subscription Charge Adjustment records.

To import Subscription Charge Adjustment records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Charge Adjustment data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Charge Adjustment object, the attribute is SequenceNumber.

Required Attributes and Validations for Subscription Charge Adjustment Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Charge Adjustment records, required attributes for updating Subscription Charge Adjustment records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Charge Adjustment import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Charge Adjustment Record	Updating an Existing Subscription Charge Adjustment Record
ChargeAdjustmentId	The charge adjustment ID	Do not pass any value.	Not required	Not required
ChargePuid	The charge PUID	This must be a valid charge PUID.	Required	Not required
ChargeId	The charge ID	Do not pass any value.	Not required	Not required
ChargeAdjustmentPuid	The charge adjustment PUID	This must be a unique charge adjustment PUID.	Required	Required
PeriodFrom	The period from which the subscription charge adjustment is valid	This must be a valid billing period.	A value is required when the charge type is RECURRING and effectivity is ORA_SPECIFIC_PERIODS.	Not required
PeriodUntil	The period till which the subscription charge adjustment is valid	This must be a valid billing period. It must be greater than or equal to the value in PeriodFrom.	A value is required when the charge type is RECURRING and effectivity is ORA_SPECIFIC_PERIODS.	Not required
AdjustmentType	The adjustment type	ORA_DISCOUNT_AMOUNT, ORA_DISCOUNT_PERCENT, ORA_MARKUP_AMOUNT, ORA_MARKUP_PERCENT, ORA_PRICE_OVERRIDE	Required	Not required
AdjustmentValue	The adjustment value	This must be a positive number.	Required	Not required
AdjustmentBasis	The adjustment basis	ORA_LIST_PRICE, ORA_NET_PRICE	A value is required when the adjustment type is discount percent or markup percent	Not required
SequenceNumber	The sequence number	This must be a unique charge adjustment sequence number.	Not required	Not required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Charge Adjustment Record	Updating an Existing Subscription Charge Adjustment Record
SubscriptionProductId	The subscription product ID	Do not pass any value.	Not required	Not required
AutoAdjustmentFlag	Option for auto adjustment	Y or N	Not required	Not required
Effectivity	The effectivity of the subscription charge adjustment	ORA_ALL_TERM, ORA_PERIODS_BEFORE_END_DT, ORA_PERIODS_AFTER_START_DT, ORA_SPECIFIC_PERIODS	A value is required when the charge type is RECURRING.	Not required
NumberOfPeriods	The number of periods	This must be a positive integer.	A value is required when the charge type is RECURRING and effectivity is ORA_PERIODS_AFTER_START_DT or ORA_PERIODS_BEFORE_END_DT.	Not required

You can view the Subscription Charge Adjustment 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Charge Adjustment** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Charge Adjustment from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.

6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Charge Tier Data

You can use import management to create or update Subscription Charge Tier records.

To import Subscription Charge Tier records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Charge Tier data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Charge Tier object, the attribute is SequenceNumber.

Required Attributes and Validations for Subscription Charge Tier Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Charge Tier records, required attributes for updating Subscription Charge Tier records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Charge Tier import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Charge Tier Record	Updating an Existing Subscription Charge Tier Record
SequenceNumber	The sequence number of the charge tier	This must be a unique sequence number for the charge tier.	Required	Not required
TierFrom	The tier from	This must be a positive integer.	Required	Not required
ListPrice	List price for the subscription charge tier	This must be a positive integer.	Required	Not required
PriceFormat	The price format	Lookup: ORA_OSS_PRICE_ FORMAT	Required	Not required
ChargeTierId	The charge tier ID	Do not pass any value.	Not required	Not required
ChargePuid	The charge PUID	This must be a valid charge PUID.	Required	Not required
ChargeId	The charge ID	Do not pass any value.	Not required	Not required
ChargeTierPuid	The charge tier PUID	This must be a unique charge tier PUID.	A value is auto generated when a record is created.	Required
SubscriptionId	The Subscription ID	Do not pass any value.	Not required	Not required
SubscriptionProductId	The subscription product ID	Do not pass any value.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Charge Tier Record	Updating an Existing Subscription Charge Tier Record
TierTo	The tier to	This must be greater than or equal to the value in tier from.	Required	Not required
BlockSize	The block size	This must be a positive number or null.	Required	Not required

You can view the Subscription Charge 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.

Note: You must define the Tiers in Pricing system only if you're using Fusion pricing application. Importing Tiers won't have any effect if Pricing System is Fusion.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Charge Tier** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Charge Tier from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Contact Data

You can use import management to create or update Subscription Contact records.

To import Subscription Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Contact data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Contact object, the attributes are ContactPuid and PartyPuid.

Required Attributes and Validations for Subscription Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Contact records, required attributes for updating Subscription Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Contact import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Contact Record	Updating an Existing Subscription Contact Record
SubscriptionContactId	Identifier of the subscription contact record	Do not pass any value. This value is auto generated.	Not required	Not required
ContactPuid	PUID of the subscription contact record	This must be a unique contact PUID.	Required	Required
SubscriptionId	Identifier of the subscription	Do not pass any value.	Required	Not required
SubscriptionPartyId	Identifier of the subscription party	Do not pass any value.	Required	Not required
PartyPuid	PUID of the subscription party	This must be a valid party PUID.	Required	Not required
PartyId	Identifier of the party	Do not pass any value.	Not required	Not required
ContactId	Identifier of the contact	HZ_RELATIONSHIPS for external contacts, JTF_RS_RESOURCE_PROFILES for internal contacts	Required	Not required
ContactRole	Role played by the contact	Lookup: ORA_OSS_PARTY_CONTACT_ROLES	Required	Not required
StartDate	Start date of the subscription contact	Do not pass any value.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Contact Record	Updating an Existing Subscription Contact Record
EndDate	End date of the subscription contact	Do not pass any value.	Not required	Not required
AccessLevel	Access level	Do not pass any value.	Not required	Not required
BillingOwnerFlag	Option for Billing owner	Y or N	Not required	Not required
InternalFlag	Internal option	Y or N	Not required	Not required
ContactName	Contact name	Do not pass any value	Not required	Not required
ContactEmail	Email address of the contact	Do not pass any value	Not required	Not required

You can view the Subscription Contact 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Contact** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Contact from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Covered Bill Line Data

You can use import management to create or update Subscription Covered Bill Line records.

To import Subscription Covered Bill Line records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Covered Bill Line data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Covered Bill Line object, the attributes are:

- CoveredLevelPuid
- BillLinePuid
- TransactionNumber
- NewCreditMemoPUID

Required Attributes and Validations for Subscription Covered Bill Line Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Covered Bill Line records, required attributes for updating Subscription Covered Bill Line records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Covered Bill Line import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Bill Line Record	Updating an Existing Subscription Covered Bill Line Record
BillLineId	The bill line ID	Do not pass any value	Not required	Not required
BillingPeriod	The billing period	This must be a positive number and unique for the product.	Required	Not required
DateToInterface	The date to interface	This must be a valid date.	Not required	Not required
DateBilledFrom	The date from which the billing starts	This must be a valid date.	Required	Not required
DateBilledTo	The date up to which the billing is valid	This must be a valid date.	Required	Not required
RecurringFlag	Option indicating whether this line is recurring	Y or N	Required	Not required
InterfacedFlag	Option indicating whether the bill line is interfaced	Y or N	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Bill Line Record	Updating an Existing Subscription Covered Bill Line Record
CoveredLevelId	The covered level ID	Do not pass any value.	Not required	Not required
CoveredLevelPuid	The covered level PUID	This must be a valid covered level PUID.	Required	Not required
BillLinePuid	The bill line PUID	This must be a unique bill line PUID.	Required	Required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required
SubscriptionProductId	The subscription product ID	Do not pass any value.	Not required	Not required
ChargeId	The charge ID	This must be a valid charge ID.	Required	Not required
Amount	The amount	This must be a positive number.	Required	Not required
UsageFlag	Option indicating whether the line is a usage line	Y or N	Required	Not required
UsageAcquiredFlag	Option indicating whether the usage has been acquired	Y or N	Not required	Not required
UsagePricedFlag	Option indicating whether usage line has been priced	Y or N	Not required	Not required
TransactionClass	The transaction class	This must be INV for invoice and CM for credit memo.	Required	Not required
TransactionTax	The transaction tax	This must be a positive number.	Not required	Not required
TransactionAmount	The transaction amount	This must be a positive number.	Not required	Not required
InvoiceBillLineId	The invoice bill line ID	Do not pass any value.	Not required	Not required
UsageCaptureDate	The usage capture date	This must be a valid date.	Not required	Not required
UsageQuantity	The usage quantity	This must be a positive number.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Bill Line Record	Updating an Existing Subscription Covered Bill Line Record
ChargePeriod	The charge period	This must be a valid charge period.	Not required	Not required
PricingError	The pricing error	Do not pass any value.	Not required	Not required
ListPrice	The list price	This must be a positive number when TransactionClass is INV and number when it's CM.	Required	Not required
RevenueLineId	The revenue line ID	Do not pass any value.	Not required	Not required
TransactionClassMeaning	The meaning of transaction class lookup	Invoice or Credit Memo	Not required	Not required
InvoiceDate	The invoice date	This must be a valid date.	Not required	Not required
NewCreditMemoPUID	The credit memo PUID	Do not pass any value.	Not required	Not required
CreditMemoAmount	The credit memo amount	Do not pass any value.	Not required	Not required
CreditMemoFlag	The credit memo option	Do not pass any value.	Not required	Not required
CreditMemoReason	The credit memo reason	Do not pass any value.	Not required	Not required
CustomerTrxTypeSequenceI	The customer transaction type sequence ID	This must be a number.	Not required	Not required

You can view the Subscription Covered Bill Line 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Covered Bill Line** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Covered Bill Line from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Covered Level Data

You can use import management to create or update Subscription Covered Level records.

To import Subscription Covered Level records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Subscription Covered Level data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud
- Ensure prerequisite setups are done, if applicable
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier For Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. If you're creating 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 Subscription Covered Level object, the attributes are SubscriptionProductPuid and CoveredLevelPuid.

Required Attributes and Validations for Subscription Covered Level Object

To import data successfully into Oracle Applications 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 Subscription Level records, required attributes for updating Subscription Covered Level records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Covered Level import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Level record	Updating an Existing Subscription Covered Level record
Type	The type	ORA_OSS_COVERED_ LEVEL	Required	Not required
StartDate	The start date	This must be later than or equal to the subscription product start date.	Required	Not required
CoveredLevelId	The covered level ID	Do not pass any value. This is auto generated.	Not required	Not required
Quantity	The quantity	This must be a positive integer.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Level record	Updating an Existing Subscription Covered Level record
SubscriptionProductPuid	The subscription product PUID	This must be a valid subscription product PUID.	Required	Not required
SubscriptionProductId	The subscription product ID	This is auto generated when a record is created.	Not required	Not required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required
CoveredLevelPuid	The covered level PUID	This must be a unique PUID.	Required	Required
LineNumber	The line number	This must not be duplicate	Required	Not required
InventoryItemId	The inventory item ID	EGP_SYSTEM_ITEMS_ B.INVENTORY_ITEM_ID	Required	Not required
AssetId	The asset ID	CSE_ASSETS_VL.ASSET_ID	Not required	Not required
AssetName	The asset name	CSE_ASSETS_VL.ASSET_ NUMBER	Not required	Not required
AssetSerialNumber	The asset serial number	CSE_ASSETS_VL.SERIAL_ NUMBER	Not required	Not required
ProductName	The product name	Do not pass any value.	Not required	Not required
TypeName	The type name	ORA_OSS_COVERED_ LEVEL	Not required	Not required
ItemUnitOfMeasure	The item unit of measure	INV_UNITS_OF_MEASURE_ B.UOM_CODE	Not required	Not required
TotalContractValue	The total contract value	Do not pass any value.	Not required	Not required
GenerateBillingSchedule	The generate billing schedule indicator	Must be Y or N	Not required	Not required
EndDate	The end date	This must be earlier than the end date of the subscription product.	Not required	Not required
Duration	The duration	This must be a positive integer.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Level record	Updating an Existing Subscription Covered Level record
Period	The period	This must be a valid value from OSS_TIME_CODE_UNITS.	Not required	Not required
Status	The status	This must be ORA_D.RAFT	Not required	Not required
SuspendedDate	The date of suspension	This must be between the start date and end date of the subscription product.	Not required	Not required
StatusName	The status meaning	Draft	Not required	Not required
PriceUnitOfMeasure	The price unit of measure	INV_UNITS_OF_MEASURE_VL.UOM_CODE	Not required	Not required
PriceUnitOfMeasureName	The price unit of measure meaning	INV_UNITS_OF_MEASURE_VL.UNIT_OF_MEASURE	Not required	Not required
PriceListId	The price list ID	Do not pass any value.	Not required	Not required
PricingError	The pricing error	Do not pass any value.	Not required	Not required
TaxAmount	The tax amount	Do not pass any value.	Not required	Not required
CancelReason	The cancel reason	This must be a valid reason. Lookup: ORA_OSS_CANCEL_REASONS	Not required	Not required
CanceledDate	The canceled date	This must be between the start date and end date.	Not required	Not required
CanceledAmount	The canceled amount	Do not pass any value.	Not required	Not required
ClosedDate	The closed date	This must be later than the start date.	Not required	Not required
CloseReason	The close reason	Lookup: ORA_OSS_CLOSE_REASONS	Not required	Not required
ClosedAmount	The closed amount	Do not pass any value.	Not required	Not required
ReturnCreditMethod	The return credit method	Lookup: ORA_OSS_CLOSE_CREDIT_METHOD	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Level record	Updating an Existing Subscription Covered Level record
SuppressedCreditAmount	The suppressed credit amount	Do not pass any value.	Not required	Not required
InvoicedAmount	The invoiced amount	Do not pass any value.	Not required	Not required
CreditedAmount	The credited amount	Do not pass any value.	Not required	Not required
RenewedDate	The renewed date	Do not pass any value.	Not required	Not required
RenewalType	The renewal type	Lookup: ORA_OSS_ RENEWAL_ACTION	Not required	Not required
CurrencyCode	The currency code	Do not pass any value	Not required	Not required
PutOnHoldFlag	Indicates whether the covered level is put on hold	Y or N	Not required	Not required
RemoveHoldFlag	Indicates whether the hold is removed	Y or N	Not required	Not required
SuspendCreditMethod	The suspend credit method	Lookup: ORA_OSS_CLOSE_ CREDIT_METHOD	Not required	Not required
SuspendReason	The suspend reason	Lookup: ORA_OSS_CLOSE_ REASONS	Not required	Not required
TaxError	The tax error	Do not pass any value.	Not required	Not required

You can view the Subscription Covered Level 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Subscription Covered Level object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Subscription Covered Level from the Object drop-down list.
4. Select the CSV file in the File Name field and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page, which provides the status details of the import activity.

Import Your Subscription Covered Level Charge Data

You can use import management to create or update Subscription Covered Level Charge records.

To import Subscription Covered Level Charge records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

To import your Subscription Covered Level Charge data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud
- Ensure prerequisite setups are done, if applicable
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier For Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. If you're creating 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 Subscription Covered Level Charge object, the attributes are CoveredLevelPuid, PrePaymentNumber and SequenceNumber.

Required Attributes and Validations for Subscription Covered Level Charge Object

To import data successfully into Oracle Applications 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 Subscription Level records, required attributes for updating Subscription Covered Level Charge records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Covered Level Charge import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Level Charge record	Updating an Existing Subscription Covered Level Charge record
PriceType	The price type	RECURRING or ONE_TIME	Required	Not required
ChargeId	The charge ID	Do not pass any value.	Not required	Not required
CoveredLevelPuid	The covered level PUID	This must be a valid covered level PUID.	Required	Not required
CoveredLevelId	The covered level ID	Do not pass any value.	Not required	Not required
ChargePuid	The charge PUID	This must be a unique charge PUID.	Required	Required
BillLineId	The bill line ID	Do not pass any value.	Not required	Not required
PricePeriodicity	The price periodicity	This must be a valid value from oss_time_code_units.	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Covered Level Charge record	Updating an Existing Subscription Covered Level Charge record
RollupFlag	The option indicating whether charges should be rolled up	Y or N	Not required	Not required
SequenceNumber	The sequence number	This must be a positive number.	Not required	Not required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required
SubscriptionProductId	The subscription product ID	Do not pass any value.	Not required	Not required
UnitListPrice	The unit list price	This must be a valid number.	Required	Not required
Allowance	The allowance	Do not pass any value.	Not required	Not required
BlockSize	The block size	This must be a positive number.	Not required	Not required
TierType	The tier type	Do not pass any value.	Not required	Not required
UsagePriceLockFlag	Option indicating whether the usage price is locked	Do not pass any value.	Not required	Not required
PricePeriodicityName	The price periodicity name	Do not pass any value.	Not required	Not required
MeterDefinitionId	The meter definition ID	This must be a valid meter definition ID.	Not required	Not required
MeterId	The meter ID	This must be a valid meter ID.	Not required	Not required
InitialMeterReadingId	The initial meter reading ID	This must be a valid meter reading ID.	Not required	Not required
AggregationMethod	The aggregation method	This must be a valid aggregation method.	Not required	Not required
TieredFlag	The option indicating whether the charge has tiers	Y or N	Required	Not required

You can view the Subscription Covered Level Charge 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the Subscription Covered Level Charge object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Subscription Covered Level Charge from the Object drop-down list.
4. Select the CSV file in the File Name field and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page, which provides the status details of the import activity.

Import Your Subscription Party Data

You can use import management to create or update Subscription Party records.

To import Subscription Party records, perform the following tasks:

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

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Party data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Party object, the attributes are Subscription PartyPUID, SubscriptionNumber, and PartyNumber.

Required Attributes and Validations for Subscription Party Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Party records, required attributes for updating Subscription Party records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Party import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Party Record	Updating an Existing Subscription Party Record
SubscriptionPartyId	Identifier of the subscription party record	Do not pass any value. This is autogenerated.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Party Record	Updating an Existing Subscription Party Record
PartyPuid	PUID of the subscription party record	This must be a unique party PUID.	Required	Required
SubscriptionId	Subscription ID	Do not pass any value.	Conditionally required	Not required
SubscriptionNumber	Subscription Number	This must be a valid subscription number.	Conditionally required	Not required
PartyId	Party ID	This must be a valid party - HZ_PARTIES	Required	Not required
PartyName	Name of the party	This must be a valid party name - HZ_PARTIES	Not required	Not required
PartyNumber	Number of the party	This must be a valid party number - HZ_PARTIES	Not required	Not required
PartyRole	Role of the party	Lookup: ORA_OSS_PARTY_ ROLES	Required	Not required
PrimaryFlag	Check box indicating whether this party is primary	Value must be Y or N	Required	Not required
InternalFlag	Check box indicating whether this party is internal	Value must be Y or N	Required	Not required

You can view the Subscription Party 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Party** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Party from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

How do I import subscription product data?

You can use import management to create or update Subscription Product records.

To import Subscription Product records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Product data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.

- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Product object, the attributes are:

- LineNumber
- SubscriptionProductPuid
- BillToAccountNumber
- ExemptCertificateNumber

Required Attributes and Validations for Subscription Product Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Product records, required attributes for updating Subscription Product records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Product import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
LineNumber	The line number	• This must not be duplicate within a subscription. • Don't pass values in LineNumber column in import file if there is a requirement to generate auto_line_ number. • Don't enable the auto numbering from	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
		subscription profile if values are provided in LineNumber column in import file. • Don't enable the check-box for Automate Subscription Line Numbering in Subscription profile if there is requirement to use line number in following format 'xxxxx-xx-xx'		
DefinitionOrganizationId	The item master organization	This must be a valid ORGANIZATION_ID from the HR_ALL_ ORGANIZATION_UNITS_F table.	Not required	Not required
InventoryItemId	The inventory item ID	EGP_SYSTEM_ITEMS_ B.INVENTORY_ITEM_ID	Required	Not required
StartDate	The start date of the subscription	This must be later than or equal to the subscription start date.	Required	Not required
Currency	The subscription product currency	Do not pass any value.	Not required	Not required
InvoicingRuleId	The invoicing rule ID	RA_RULES.RULE_ID where TYPE ='I'	Not required	Not required
BillingFrequency	The billing frequency	oss_time_code_units.user_ uom_code	Not required	Not required
AccountingRuleId	The accounting rule ID	RA_RULES.RULE_ID where TYPE in ('A','ACC_DUR', 'PP_ DR_ALL','PP_DR_PP')	Not required	Not required
TransactionTypeName	The transaction type name	This must be a valid transaction type name per RA_CUST_TRX_TYPES_ALL table.	Not required	Not required
BillToAccountId	The bill-to account ID	HZ_CUST_ ACCOUNTS.CUST_ ACCOUNT_ID	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
BillToSiteUseId	The bill-to site use ID	HZ_CUST_SITE_USES_ ALL.SITE_USE_ID	Not required	Not required
PaymentTermsId	The payment terms ID	RA_TERMS_VL.TERM_ID	Not required	Not required
SubscriptionProductId	The subscription product ID	This is auto generated when a record is created.	Not required	Required
Status	The subscription product status	This must be ORA_DRAFT.	Not required	Not required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required
SubscriptionNumber	The subscription number	This must be a valid and existing subscription number.	Required	Not required
SubscriptionProductPuid	The subscription product PUID	This must be a unique subscription product PUID.	Required	Not required
EnablePricingTermsFlag	Option indicating whether the pricing terms are enabled	Y or N	Not required	Not required
SummarizedBillingFlag	Option indicating whether billing is summarized at covered product level	Y or N	Not required	Not required
InterfaceOffsetDays	The interface offset days	This must be a number.	Not required	Not required
CoverageName	The coverage name	OSS_COVEREAGE_ HEADERS.COVERAGE_ HEADER_ID	Not required	Not required
SuspendReason	The suspend reason	Lookup: ORA_OSS_CLOSE_ REASONS	Not required	Not required
SuspendedDate	The date of suspension	This must be between the start date and end date.	Not required	Not required
SuspendCreditMethod	The suspend credit method	Lookup: ORA_OSS_CLOSE_ CREDIT_METHOD	Not required	Not required
ResumeDate	The date of resumption of a suspended subscription	This must be a valid date.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
ResumeDuration	The duration for which the suspended subscription isn't resumed	This must be a positive integer.	Not required	Not required
ResumePeriod	The period for which the suspended subscription isn't resumed	This must be a valid value from OSS_TIME_CODE_ UNITS.	Not required	Not required
AutoExtendFlag	Option indicating whether the subscription should be auto extended	Y or N	Not required	Not required
ChurnProbability	The churn probability of the subscription product	Do not pass any value.	Not required	Not required
InvoicedAmount	The invoiced amount	Do not pass any value.	Not required	Not required
CreditedAmount	The credited amount	Do not pass any value.	Not required	Not required
CanceledAmount	The canceled amount	Do not pass any value.	Not required	Not required
ClosedAmount	The closed amount	Do not pass any value.	Not required	Not required
LineNumber	The line number	This must not be duplicate within a subscription.	Required	Not required
Duration	The duration	This must be a positive integer.	Not required	Not required
Period	The subscription product period	This must be a valid value from OSS_TIME_CODE_ UNITS.	Not required	Not required
GenerateBillingSchedule	Option indicating whether billing schedule is to be generated	Must be Y or N	Not required	Not required
PriceListName	The price list name	Do not pass any value.	Not required	Not required
PricingTermsPricingMethod	The pricing terms pricing method	ORA_MARKUP_AMOUNT, ORA_MARKUP_PERCENT, ORA_REPRICE	Not required	Not required
PricingTermsPeriod	The pricing terms period	This must be a valid value from OSS_TIME_CODE_ UNITS.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
PricingTermsDuration	The pricing terms duration	This must be a positive integer.	Not required	Not required
PricingTermsAdjustmentPCT	The pricing terms adjustment	This must be a positive integer. Lookup:	Not required	Not required
AmendCreditMethod	The amend credit method	ORA_OSS_CLOSE_CREDIT_METHOD	Not required	Not required
AmendCreditMethodName	The amend credit method name	Lookup: ORA_OSS_CLOSE_CREDIT_METHOD	Not required	Not required
AmendEffectiveDate	The amend effective date	This date must be between the start and the end dates.	Not required	Not required
AmendReason	The amend reason	Lookup: ORA_OSS_CLOSE_REASONS	Not required	Not required
AmendReasonName	The amend reason name	Lookup: ORA_OSS_CLOSE_REASONS	Not required	Not required
SalesProductType	The sales product type	SUBSCRIPTION, COVERAGE	Not required	Not required
ItemUnitOfMeasure	The item unit of measure	INV_UNITS_OF_MEASURE_B.UOM_CODE	Not required	Not required
ProductName	The product name	This must be a valid item description.	Not required	Not required
Quantity	The quantity	This must be a positive integer.	Not required	Not required
CloseReason	The reason why the product was closed	Lookup: ORA_OSS_CLOSE_REASONS	Not required	Not required
CloseCreditMethod	The close credit method	Lookup: ORA_OSS_CLOSE_CREDIT_METHOD	Not required	Not required
CancelReason	The reason why the product was canceled	This must be a valid reason. Lookup: ORA_OSS_CANCEL_REASONS	Not required	Not required
ClosedDate	The date on which the product was closed	This must be later than the start date.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
CanceledDate	The date on which the product was canceled	This must be between the start and end dates.	Not required	Not required
RenewedDate	The date on which the product was renewed	Do not pass any value.	Not required	Not required
PriceListId	The price list ID	Do not pass any value.	Not required	Not required
UnitPrice	The unit price	This must be a positive integer.	Not required	Not required
InvoicingRuleName	The invoice rule name.	RA_RULES.NAME where TYPE ='I'	Not required	Not required
BillingFrequencyName	The billing frequency name	oss_time_code_units.base_uom_code	Not required	Not required
AccountingRuleName	The accounting rule name	RA_RULES.NAME where TYPE in ('A','ACC_DUR', 'PP_DR_ALL','PP_DR_PP')	Not required	Not required
BillToAccountNumber	The bill-to account number	HZ_CUST_ACCOUNTS.ACCOUNT_NUMBER	Not required	Not required
BillToAccountDescription	The bill-to account description	HZ_CUST_ACCOUNTS	Not required	Not required
BillToAddress	The bill-to address	Lookup: HZ_CUST_SITE_USES_ALL	Not required	Not required
ShipToPartyId	The ship-to party ID	Lookup: HZ_PARTIES	Not required	Not required
ShipToPartyName	The ship-to party name	Lookup: HZ_PARTIES	Not required	Not required
ShipToPartySiteId	The ship-to party site ID	Lookup: HZ_CUST_SITE_USES_ALL	Not required	Not required
ShipToPartySiteName	The ship-to party site name	Lookup: HZ_CUST_SITE_USES_ALL	Not required	Not required
PaymentMethod	The payment method ID	This must be ORA_PURCHASE_ORDER or ORA_WIRE.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Record	Updating an Existing Subscription Product Record
PaymentMethodName	The payment method name	This must be Purchase Order or Wire.	Not required	Not required
PaymentTermsName	The payment terms name	RA_TERMS_VL.NAME	Not required	Not required
TaxExemptionHandling	The tax exemption handling	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
TaxExemptionHandlingNam	The tax exemption handling name	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
ExemptCertificateNumber	The exempt certificate number	ZX_EXEMPTIONS_ V.EXEMPT_CERTIFICATE_ NUMBER	Not required	Not required
ExemptReason	The exempt reason	LOOKUP_TYPE: ZX_ EXEMPTION_CONTROL	Not required	Not required
OutputTaxClassification	The output tax classification	LOOKUP_TYPE: ZX_OUTPUT_ CLASSIFICATIONS	Not required	Not required
TaxError	The tax error	Do not pass any value.	Not required	Not required
CoverageScheduleId	The coverage schedule ID	Do not pass any value.	Not required	Not required
RenewalType	The renewal type	Lookup: ORA_OSS_ RENEWAL_ACTION	Not required	Not required
BillingDateCode	The billing date code	ORA_DAY, ORA_OFFSET, ORA_PERIOD_END, ORA_ PERIOD_START	Not required	Not required
BillingDateName	The billing date name	Day, Offset, Period end, Period start	Not required	Not required
TotalContractValue	The total contract value	Do not pass any value.	Not required	Not required
EstimatedTax	Estimated Tax	Do not pass any value.	Not required	Not required
PricingError	The pricing error	Do not pass any value.	Not required	Not required

> **Note:** To generate the billing schedule based on your pricing, set the **GenerateBillingSchedule** option to Yes and re-import the Subscription.csv file after all files have been imported. You should not provide the GenerateBillingSchedule option in the Subscription Product CSV file but only in the Subscription CSV file.

You can view the Subscription Product 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Product** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Product from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

How do I import subscription product bill line data?

You can use import management to create or update Subscription Product Bill records.

To import Subscription Product Bill records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Product Bill data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Product Bill object, the attributes are CoveredLevelPuid, PrePaymentNumber and SequenceNumber.

Required Attributes and Validations for Subscription Product Bill Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription

Product Bill records, required attributes for updating Subscription Product Bill records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Product Bill import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Bill Record	Updating an Existing Subscription Product Bill Record
DateBilledTo	The date up to which the subscription product is billed	This must be a valid date.	Required	Not required
RecurringFlag	Option indicating whether this line is recurring. **Note:** Pass recurring flag as 'Y' if you need to create Credit Memo.	Y or N	Required	Not required
BillingPeriod	The billing period	This must be a positive number and unique for the product.	Required	Not required
DateToInterface	The date to interface	This must be a valid date.	Not Required	Not required
DateBilledFrom	The date from which the subscription product is billed	This must be a valid date.	Required	Not required
BillLineId	The bill line ID	Do not pass any value.	Not Required	Not required
InterfacedFlag	Option indicating whether the bill line is interfaced	Y or N	Required	Not required
SubscriptionProductPuid	The subscription product PUID	This must be a valid subscription product PUID.	Required	Not required
SubscriptionId	The subscription ID.	Do not pass any value.	Not Required	Not required
SubscriptionProductId	The subscription product ID.	Do not pass any value.	Not required	Not required
BillLinePuid	The bill line PUID.	This must be a unique bill line PUID.	Required	Required
Amount	The amount	This must be a positive number.	Required	Not required
UsageFlag	Option indicating whether the line is a usage line.	Y or N	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Bill Record	Updating an Existing Subscription Product Bill Record
UsageAcquiredFlag	Option indicating whether the usage has been acquired.	Y or N	Not required	Not required
UsagePricedFlag	Option indicating whether usage line has been priced.	Y or N	Not required	Not required
TransactionClass	The transaction class.	This must be INV for invoice and CM for credit memo.	Required	Not required
TransactionTax	The transaction tax.	This must be a positive number.	Not required	Not required
TransactionAmount	The transaction amount.	This must be a positive number.	Not required	Not required
InvoiceBillLineId	The invoice bill line ID.	Do not pass any value.	Not required	Not required
UsageCaptureDate	The usage capture date.	This must be a valid date.	Not required	Not required
UsageQuantity	The usage quantity.	This must be a positive number.	Not required	Not required
ChargePeriod	The charge period.	This must be a valid charge period.	Not required	Not required
PricingError	The pricing error.	Do not pass any value.	Not required	Not required
ListPrice	The list price.	This must be a positive number when TransactionClass is INV and a number when it's CM.	Required	Not required
RevenueLineId	The revenue line ID.	Do not pass any value.	Not required	Not required
TransactionClassMeaning	The meaning of transaction class lookup.	Invoice or Credit Memo	Not required	Not required
InvoiceDate	The invoice date.	This must be a valid date.	Not required	Not required
NewCreditMemoPUID	The credit memo PUID.	Do not pass any value.	Not required	Not required
CreditMemoAmount	The credit memo amount.	Do not pass any value.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Bill Record	Updating an Existing Subscription Product Bill Record
CreditMemoFlag	The credit memo option.	Do not pass any value.	Not required	Not required
CreditMemoReason	The credit memo reason.	Do not pass any value.	Not required	Not required
CustomerTrxTypeSequenceI	The customer transaction type sequence ID.	This must be a number.	Not required	Not required
CoveredLevelId	The covered level ID.	Do not pass any value.	Not required	Not required
ChargeId	The charge ID.	This must be a valid charge ID.	Required	Not required

You can view the Subscription Product Bill 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.

Note: Total cost value (TCV) isn't automatically calculated while importing bill lines. You need to manually calculate it and add it to header and product level. You can automatically calculate the TCV and generate bill line by setting Generate Billing to Y in header.

Note: To import Subscription Bill Line Credit memo, you must `include BillLinePuid`, `CreditMemoAmount`, `CreditMemoFlag`, and `CreditMemoReason` attributes in the CSV file. The `BillLinePuid` should be the PUID of the existing Invoice Bill Line for which a Credit memo needs to be added.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Product Bill** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.

2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Product Bill from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Product Charge Data

You can use import management to create or update Subscription Product Charge records.

To import Subscription Product Charge records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Product Charge data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Product Charge object, the attributes are SubscriptionProductPuid, ChargePuid, and SequenceNumber.

Required Attributes and Validations for Subscription Product Charge Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Product Charge records, required attributes for updating Subscription Product Charge records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Product Charge import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Charge Record	Updating an Existing Subscription Product Charge Record
PriceType	The price type	RECURRING or ONE_TIME	Required	Not required
ChargeId	The charge ID	Do not pass any value.	Not required	Not required
SubscriptionProductPuid	The subscription product PUID	This must be a valid subscription product PUID.	Required	Not required
SubscriptionId	The subscription ID	Do not pass any value.	Not required	Not required
SubscriptionProductId	The subscription product ID	Do not pass any value.	Not required	Not required
ChargePuid	The charge PUID	This must be a unique charge PUID.	Required	Required
BillLineId	The bill line ID	Do not pass any value.	Not required	Not required
CoveredLevelId	The covered level ID	Do not pass any value.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Charge Record	Updating an Existing Subscription Product Charge Record
PricePeriodicity	The price periodicity	This must be a valid value from oss_time_code_units.	Required	Not required
RollupFlag	The option indicating whether charges should be rolled up	Y or N	Not required	Not required
SequenceNumber	The sequence number	This must be a positive number.	Not required	Not required
UnitListPrice	The unit list price	This must be a valid number.	Required	Not required
Allowance	The allowance	Do not pass any value.	Not required	Not required
BlockSize	The block size	This must be a positive number.	Not required	Not required
TieredFlag	Option indicating whether the charge has tiers	Y or N	Required	Not required
TierType	The tier type	Do not pass any value.	Not required	Not required
Generate Billing Schedule	The option to generate the billing schedule	Y or N	Not required	Not required
UsagePriceLockFlag	Option indicating whether the usage price is locked	Do not pass any value.	Not required	Not required
PricePeriodicityName	The price periodicity name	Do not pass any value.	Not required	Not required
MeterDefinitionId	The meter definition ID	This must be a valid meter definition ID.	Not required	Not required
MeterId	The meter ID	This must be a valid meter ID.	Not required	Not required
InitialMeterReadingId	The initial meter reading ID	This must be a valid meter reading ID.	Not required	Not required
AggregationMethod	The aggregation method	This must be a valid aggregation method.	Not required	Not required

Note: To generate the billing schedule based on your pricing, set the **GenerateBillingSchedule** option to Yes and re-import the Subscription.csv file after all files have been imported.

You can view the Subscription Product Charge 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Product Charge** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Product Charge from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Product Sales Credit Data

You can use import management to create or update Subscription Product Sales Credit records.

To import Subscription Product Sales Credit records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Product Sales Credit data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Product Sales Credit object, the attribute is SubscriptionProductPuid.

Required Attributes and Validations for Subscription Product Sales Credit Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Product Sales Credit records, required attributes for updating Subscription Product Sales Credit records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Product Sales Credit import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Sales Credit Record	Updating an Existing Subscription Product Sales Credit Record
SalesCreditId	Internal ID of the sales credit record	Do not pass any value.	Do not pass any value. This will be auto-created.	Not required
SalesCreditPuid	PUID of the sales credit record	Enter a unique PUID.	Required	Required
SubscriptionProductPuid	PUID of the subscription product for which this sales credit is being created or updated.	This must be a valid subscription number.	A value is required if you're creating a sales credit for a subscription.	Not required
SubscriptionProductId	ID of the subscription product	Do not pass any value.	Not required	Not required
SubscriptionId	ID of the subscription	Do not pass any value.	Not required	Not required
SalesCreditTypeId	Sales credit type ID	This must be a valid value as per the sales quota lookup.	Required	Not required
StartDate	Start date of the sales credit	Do not pass any value.	Not required	Not required
EndDate	End date of the sales credit	Do not pass any value.	Not required	Not required
Percentage	Percentage of sales credit	This must be greater than zero and less than or equal to 100.	Required	Not required

You can view the Subscription Product Sales Credit 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Product Sales Credit** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Product Sales Credit from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Subscription Sales Credit Data

You can use import management to create or update Subscription Sales Credit records.

To import Subscription Sales Credit records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Subscription Sales Credit data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. 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 Subscription Sales Credit object, the attributes are SalesCreditPUID and SubscriptionNumber.

Required Attributes and Validations for Subscription Sales Credit Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Subscription Sales Credit records, required attributes for updating Subscription Sales Credit records, prerequisite setup tasks for the attributes, and specific validations, if any, for Subscription Sales Credit import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Sales Credit Record	Updating an Existing Subscription Sales Credit Record
SalesCreditPuid	PUID of the sales credit record	Enter a unique PUID.	Required	Required
SubscriptionNumber	Subscription number	This must be a valid subscription number.	A value is required if you're creating a sales credit for subscription.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Sales Credit Record	Updating an Existing Subscription Sales Credit Record
SubscriptionId	Subscription ID	This must be a valid subscription ID.	A value isn't required if the subscription number is entered.	Not required
SubscriptionProductId	Subscription product ID	Do not use this column	Do not use this column	Not required
SalesrepId	Sales representative ID	This must be a valid sales person ID.	Conditionally required A value is required if the SalesPerson isn't entered.	Not required
SalesPerson	Sales person name	This must be a valid sales person name.	Conditionally required A value is required if the SalesrepId isn't entered.	Not required
SalesCreditTypeId	Sales credit type ID	This must be a valid value as per the sales quota lookup.	Required	Not required
Percentage	Percentage of sales credit	This must be greater than zero and less than or equal to 100.	Required	Not required

You can view the Subscription Sales Credit 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Subscription Sales Credit** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

3. In the **Enter Import Options** page, provide a name for the import activity, and select Subscription Sales Credit from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Import Your Template Data

You can use the Import Management to create, update, or delete template records.

You can import template records using these steps:

1. Map your source template data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the template data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your template data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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

To better manage your template information, the template object has the following child object:

- Template Action

If you want to import only a few records, then you can create a single CSV file for all template attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the template child objects. Note that you must have imported the CSV file for template object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new templates or are updating templates that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Template Object

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

This table lists the required attributes for template records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Template record	Updating an Existing Template record
Calendar	The unique Id of the existing Calendar record in the Oracle Fusion destination table.	Provide a valid Calendar ID..	Required	Not required
Template	Name of the Template.	None	Required	Not required
Context	Indicates the context of the Template. Currently, the	The Valid Value is ServiceRequest.	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Template record	Updating an Existing Template record
	context of the template is always 'Service Request'.			
Template Id	The unique Id of the Template record in the Oracle Fusion destination table.	None	Not required	A value is required if you're updating an existing Template and you're not providing the Template Number
TemplateNumber	Specifies the original system reference (Template Unique Id), if the record was imported	None	Not required	A value is required if you're updating an existing Template and you're not providing the Template ID

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the template object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Template** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the template information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Template from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Template Action Data

You can use the Import Management to create, update, or delete template action records.

You can import template action records using these steps:

1. Map your source template action data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the template action data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

To import your template action data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.

* You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

* Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
* Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new template actions or are updating template actions that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Template Action Object

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

This table lists the required attributes for template action records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Template Action record	Updating an Existing Template Action record
Action Id	Specifies the foreign key that references the Action ID to which the action is assigned	Identify the Action ID value by exporting the Action object for the actions marked as "ORA_SVC_ CUSTOMER_VISIBLE". Navigate to the following in the Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes	Required	Not required
Template Action Id	Specifies the unique Id of the Template Action record in the Oracle Fusion destination table	None	Not required	A value is required if you're updating an existing Template Action and you're not providing the Template Number.
Template Id	Specifies the foreign key that references the Template ID to which the action is assigned	Identify the Template ID value by exporting the Template object. Navigate to the following in the	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Template Action record	Updating an Existing Template Action record
		Setup and Maintenance work area: • Offering: Sales • Functional Area: Data Import and Export • Task: Manage Bulk Data Export, Schedule Export Processes		
TemplateNumber	Specify a value for this attribute to add a new record for templateAction. To update the templateAction , specify a value for the templateActionID attribute	None	Not required	A value is required if you're updating an existing Template and you're not providing the Template Action ID.

Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**, to see all the attributes of the template action object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Template Action** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the template action information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Template Action from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records
- How do I import data?

Import Your Wrap Up Data

You can use Import Management to create or update Wrap Up records.

To import Wrap Up records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

To import your Wrap Up data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Wrap Up or are updating Wrap Up that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Wrap Up Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. This table lists the required attributes for importing new Wrap Up records, required attributes for updating Wrap Up records, prerequisite setup tasks for the attributes, and specific validations, if any, for Wrap Up import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Wrap Up Record	Updating an Existing Wrap Up Record
Interaction ID	The unique identifier of the interaction. A wrap up is a child resource of the interaction.	Integer	18	If a value is provided to create or update a Wrap Up record, then the value must exist in the column INTERACTION_ ID of the SVC_ INTERACTIONS table.	Required	Required
Summary ID	The unique identifier of the wrap up. This value is generated during creation.	Integer	18	None	Required	Required
Call Notes	The call notes is used to store large content related to the call.	String		None	Not Required	Not Required
Communication Reason Code	The code indicating the reason for the occurrence of the interaction. A list of accepted values is defined in the lookup ORA_SVC_ MCA_COMM_ REASON_CD.	String	30	None	Not Required	Not Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Wrap Up Record	Updating an Existing Wrap Up Record
Interaction Notes	The notes associated with the interaction.	String	4000	None	Not Required	Not Required
Interaction Number	The alternate identifier of the interaction.	String	30	None	Required	Conditionally Required. Either InteractionId or InteractionNumber is required.
Resolution Code	The code indicating the resolution code of the interaction. A list of accepted values is defined in the lookup ORA_SVC_MCA_RESOLUTION_CD.	String	30	None	Not Required	Not Required
Message ID	The unique identifier of the service request message.	Integer	18	None	Not Required	Not Required
Summary Number	The summary number of the interaction.	String	30	None	Not Required	Not Required
Transfer Reason	The reason the interaction was transferred to another user. This is optional and typically provided only for a transferred interaction.	String	400	None	Not Required	Not Required
Verified	Indicates if the associated contact has been verified.	Boolean	1	None	Not Required	Not Required
Wrap Up End Time	The date and time when the wrap up ends.	Timestamp		None	Not Required	Not Required
Wrap Up Start Time	The date and time when the wrap up begins.	Timestamp		None	Not Required	Not Required

You can view the Wrap Up 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to Navigator > Tools > Import Management > Import Objects.
2. Select the Wrap Up object in the table and click Download.

You can now edit the downloaded file and provide valid values for the required attributes.

Note: For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click Create Import Activity in the Manage Imports page.
3. In the Enter Import Options page, provide a name for the import activity, and select Wrap Up from the Object drop-down list.
4. Select the CSV file in the File Name field, and click Next.
5. You would see that the source and target attributes are automatically mapped in the Map Fields page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking Validate Data. Click Next.
7. Review the import details on the Review and Submit page, and click Submit when you're ready.

Review the Import Results

Check if your import succeeded on the Manage Imports page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to Navigator > Tools > Import Management > Import Queue.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the Status column for the import activity. The import is successful if the status displays as Completed. You can drill down on the import activity to go to the Import Status page which provides the status details of the import activity.

Related Topics

- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- How You Use Alternate Keys to Import Records

Import Territory Geographies Data

Import Your Territory Geographies Data

You can use Import Management to create or update Territory Geographies records.

To import Territory Geographies records, perform the following tasks:

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

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

How You Map Your Source Data to Object Attributes

To import your Territory Geographies data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications 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 Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- 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 must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications 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 Applications 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 Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Geographies. You can determine the internal ID of a record by exporting Oracle Applications 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 Territory Geographies object, the attributes are Batch Id and Interface Row Id.
- 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 Territory Geographies object, the attribute is Import Activity Identifier.

Required Attributes and Validations for the Territory Geographies Object

To import data successfully into Oracle Applications 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 Territory Geographies records, prerequisite setup tasks for the attributes, and specific validations, if any, for Territory Geographies import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Territory Geographies Record
GeographyOrZoneName	The primary name of the geography or zone.	The geography name code is validated against the country structure to check if the structure is defined for this country.	Required
GeographyOrZoneType	The type of the geography or zone.	No validation	Required

You can view the Territory Geographies object 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

You include the data that you want to import into Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Objects**.
2. Select the **Territory Geographies** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

> **Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Territory Geographies from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next.**
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next.**
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- Potential Issues When Opening CSV Files in Excel
- How do I import data?

Example of Importing Territory Geography Data

This example demonstrates how you can import data using Import Management. In this example, you have a source file containing territory geography data that you want to import into the application.

A territory is an area of responsibility of a salesperson over a set of sales accounts. A territory can be based on various dimensions, such as the geography, product, organization type, industry, business size, account, account type, and sales channel dimension. The territory geography defines the boundaries of a territory according to the selected dimensions, such as Europe, USA, or Asia. Dimensions are attributes that define jurisdictional boundaries of territories. You can use geography dimensions to define territories by country or postal code, based on Territory Geographies. You must create or import territory geographies before they can be used in territory definitions.

Summary of the Tasks

You perform the following steps to create an import activity and activate the import.

1. Determine what information is in the source file.
2. Create and schedule the import activity.

Before You Start

1. You use the country structure of a country to define which geography types are part of the country. For more information about an example of importing a country structure, see the topic "Example of Importing Country Structure Data".
2. Ensure that the combination of the Source ID and Parent Source ID values is unique for each row of data within a single import. However, your source data files don't need to have the same Source ID and Parent Source ID values as your previously imported geography data. If the geography structure levels and the parents for each geography value are the same, then the changed IDs will not affect the import.
   For example, when importing a country, which is the upper node, and its state, you may provide the following values:
   - Data for a country: SOURCE_ ID = 1; PARENT_ID = (NULL). The PARENT_ID is null because the country is the upper level of the territory geography hierarchy and has no parent.
   - Data for a province: SOURCE_ ID = 2; PARENT_ID = 1 (the source ID of the country)

Determine the Information in the Source File

You include the data that you want to import into Sales and Fusion Service in a source CSV file. A sample input CSV file is shown below.

GeographyOrZo	LanguageCode	SourceId	ParentSourceId	GeographyOrZo	ZoneCode	CountryName	GeoParentName1
GLOBAL	US	1		GLOBAL	GBL	USA	United States
North America	US	2	1	COUNTRY		Canada	

GeographyOrZo	LanguageCode	SourceId	ParentSourceId	GeographyOrZo	ZoneCode	CountryName	GeoParentName1
REGION 1	US	3	2	REGION		USA	United States

Note: Note the following:

- The hierarchy is modeled in the CSV file using the SourceId and ParentSourceId. The ParentSourceId for the Country Record (level Number 1) is always null.
- If defining an alternate name (RecordTypeCode = 2) for the country, ensure that the ParentSourceId is the same as the SourceId for the Country record (RecordTypeCode=0) and the SourceId is a unique number.
- If defining an alternate name (RecordTypeCode = 2) for any level below the country (LevelNumber >1), ensure that the SourceId and ParentSourceId columns match the values for the original record respectively.

You must create a source file (CSV) file with the attributes and import it using import management as shown in this table.

Attribute Name	Value	Description
GeographyOrZoneName	GLOBAL	The primary name of the geography or zone.
LanguageCode	US	The unique language code of the country to which the territory geography belongs. The default value is US.
SourceId	1	The source ID for the territory geography, along with the parent source ID, is used to identify the territory geography's parent/child relationship within the source file data and subsequent interface table data.
ParentSourceId	11	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.
GeographyOrZoneType	COUNTRY	The type of the geography or zone.
ZoneCode	GBL	A unique user-defined code of the zone to which the territory geography belongs. It's used only for zones.
CountryName	USA	The name of the country for that geography. It's used only for master geographies.

Attribute Name	Value	Description
GeoParentName1	United States	This is used to specify the complete path of any master geography, starting with the country name. For example, if your TerritoryGeographyName is San Francisco, then the path of the master geography is GeoParentName1 = "United States".

You can create an import activity, enter the import details, and schedule the import. To create an import activity:

1. Go to **Navigator** > **Tools** > **Import Management** > **Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Territory Geographies** from the Object drop-down list.

   > **Note:** In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.

4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit**.

Related Topics

- How do I export data?

Import Management Post Processing for Accounts and Contacts

Import Management Post Processing Jobs

After importing your data successfully, you must run a couple of post processing jobs for duplicate identification, duplicate resolution, and account assignment.

Import Management Post Processing Job for Deduplication

After you import your account and contact data, verify if the imported data contains any duplicates. Alternatively, you must also check if your imported data has any duplicates in the database. Therefore, after you import, it's a good idea to run duplicate identification batches, and if any duplicates are found resolve them either by creating resolution requests to merge or link them.

Identify Duplicates

You can identify duplicates from the duplicate identification work area. To run duplicate identification batches, navigate to the Duplicate Identification work area as follows: Navigator > Customer Data Management > Duplicate Identification Refer to the following topics linked from the related topic section for details on how to perform this task:

- Create Duplicate Identification Batches and Define Subset Rules
- Considerations for Creating Duplicate Identification Batches
- How You Manage Duplicate

Resolve Duplicates

You can resolve duplicates from the duplicate resolution work area. To resolve duplicates, navigate to the Duplicate Resolution work area as follows - Navigator > Customer Data Management > Duplicate Resolution. Refer to the following topics linked from the related topic section for details on how to perform this task:

- Process Duplicate Resolution Requests
- Considerations for Selecting the Duplicate Resolution Request Type
- Override System Mapping

Import Management Post Processing Job for Account Assignment

You can schedule and run the Request Account Assignments scheduled process using the Scheduled Processes page. You must have the Run Sales Party Batch Assignment privilege to define and run account batch assignment. You can access the Scheduled Processes page as follows: Navigator > Tools > Scheduled Processes. Refer to the following topic linked from the related topic section for details on how to perform this task:

- Account Assignment Scheduled Processes

Delete Child Entities of Inactive Party Records

You can delete child entities of inactive parent records for Accounts, Contacts, Households, Hub Organizations, and Hub Persons. All the child and grandchild entities of the inactive (deleted) or merged parent will be inactivated or end dated. This will also delete address purpose child of the deleted address record where the parent party record is still active.

You must be a sales administrator or a CDM administrator to run this schedule process. You can delete child entities of inactive party records as follows: **Navigator Tools** >**Scheduled Processes** and search for **Delete Child Entities of Inactive Party Records**.

For more information see Delete Child Entities of Inactive Party Records in the Related Topics Section.

Related Topics

- Create Duplicate Identification Batches and Define Subset Rules
- Schedule Account Assignment
- Considerations for Creating Duplicate Identification Batches
- How You Manage Duplicates
- How do I override system mapping?
- Process Duplicate Resolution Requests
- How do I delete child entities of inactive party records?

How You Enable Automatic Account Assignment

You can enable automatic account assignment after importing data using import management, and setting the respective Profile Options for Account Assignment.

You can configure the following profile options:

- Sales Account Automatic Assignment on Import Enabled (ZCA_BATCH_ASSIGN_ON_BULK_IMPORT) - Enable automatic territory based assignment after sales accounts are imported. If disabled, manually run a batch assignment or assign each sales account individually The default option is No.
- Sales Account Automatic Assignment on Create Enabled (ZCA_SA_AUTO_ASSIGN_ON_CREATE) - Enable automatic territory based assignment processing after a sales account is created. This Profile is set to Yes for Import Management for Sales Account Assignment.
- Sales Account Automatic Assignment on Update Enabled (ZCA_SA_AUTO_ASSIGN_ON_UPDATE) - Enable automatic territory based assignment processing after a sales account is updated. This Profile is set to Yes for Import Management for Sales Account Assignment.

9 Import Data Using External Data Loader Client

Overview of External Data Loader Client

This topic provides an overview of the External Data Loader Client.

The External Data Loader Client is a command-line tool that breaks a large data file into smaller importable data files. This improves the performance of large-volume imports. You can also queue the multiple file import activities required to import a large data set, in a single action instead of manually or programmatically triggering multiple import activities.

How do I download and install the external data loader client?

This topic shows how to download and install the External Data Loader Client.

Here are the steps involved in this process:

1. Download and Install the Client
2. Set up Credentials

Before You Start

Ensure that your computer has Java version 1.8 installed.

Ensure that your Operating System is one of these:

- Microsoft Windows 7
- Microsoft Windows 8
- Microsoft Windows 10
- Microsoft Windows 11

Ensure that your Operating System is one of these.

> **Note:** The External Data Loader client doesn't support Java versions higher than version 1.8.

Required Privileges

To download the client, you must have access to My Oracle Support (support.oracle.com). To use the tool to import data into Sales and Fusion Service you must be able to access REST services and import data for the objects.

Prerequisite Steps

The Data Loader client doesn't require any specific configuration within Sales and Fusion Service. However, you must create an import map before using it. The client passes a mapping number value when submitting an import request. You can't create a new import mapping from the Data Loader Client application.

Download and Install the Client

You can download the client from My Oracle Support (Doc ID 2325249.1).

The download contains a ZIP file, with sub-folders. Save the ZIP file to a directory in which the full file path contains no white spaces. You must extract all of the files to a folder on your computer.

> **Note:** When executing the client from the command line the application uses the name oscdataloader.jar. For example,
> ```
> > java -jar oscdataloader.jar -h
> ```

Set up Credentials

You can install and use the client for automated imports while hiding the credentials that are used with the help of the Credential Store. The Credential Wallet holds one set of user credentials (user name and password pair). To save your credentials use the `savepassword` command,

```
> java -jar oscdataloader.jar savepassword -username John.Doe
```

Enter your password:

```
>
```

You are prompted to enter the password for the specified user name value. This password is masked so that it can't be viewed in the command window. You can then use the tool to submit or retrieve the status or log files for an import by only providing the user name value. This protects the password of the integration user by preventing other users from viewing the password either on the command line (by scrolling back through recently executed commands, viewing the password in the scheduling utility, or opening a configuration file containing the password value.

You can get the options for each command, by using the option -h for that command. For example, the following command lists the options available for the submit command.

```
> java -jar oscdataloader.jar submit -h
```

Use the Configuration File

The default configuration file is oscdataloader.config located in the config folder. This is used for all imports, unless otherwise mentioned. You can use another configuration file using the -config parameter.

```
> java -jar oscdataloader.jar listimports -config c:\test\configfile.txt
```

The configuration file should have all parameters, with each line of the file containing a key-value pair. For example:

```
import-name=Testing

input-file=c:\\testing\\testing.csv

mapping-number=888100111272708

target-url=https://mypod.oracle.com
```

```
object=Account

username=john.doe
```

Note: You can save your password by setting the parameter `wallet=true` in the oscdataloader.config file.

How do I import using the external data loader client?

This topic describes how to import using the External Data Loader Client tool.

You can use the tool to split a source file into multiple smaller files for upload and then import. This lets you import large files that exceed the import size limits. You can split a CSV file in one of two ways:

- Independently - the specified CSV file can be split based on selected parameters and no import is performed
- As part of import - the specified CSV file is split and then each of the resulting files is uploaded and then imported

The following steps are involved in using the tool:

- Submit Import Jobs
- Review Status of Import Jobs
- Retrieve Log Files

Submit Import Jobs

The submit operation, takes the source single CSV file, splits the file into smaller files (if necessary), uploads those files to the `Webcenter` Content Repository and then imports the files. When executing the client from the command line, you must provide the URL of the pod to run the import, the user credentials for authentication, the import object name, the import map number, and the import source file name.

```
> java -jar oscdataloader.jar submit -target-url https://mypod.oracle.com -username importuser -input-file
 Account.csv -import-name "Account Import" -object Account -mapping-number 123565
```

If multiple import activities are created due to splitting of files, then import activity name values are the same. The file name values are suffixed with a count value. For example, if the source file Account.csv is split into two files, then file name values are called Account_1.csv and Account_2.csv.

Note: If the target isn't open through public internet, it wouldn't be accessible through public internet.

You can retrieve the list of imports that have recently run on a server using the `listimports` command. For example,

```
> java -jar oscdataloader.jar listimports -target-url https://mypod.oracle.com -username importuser
```

lists the imports as a table in the command window. An example of the output would contain the following information:

Identifier	Name	Object	Attachment Object	Start Time	End Time	Status	Submitted By	Activate
0123456789012	Account Import 20170410	Account	N/A	20170410 14:56T05:00	20170410 16:56T05:00	Completed	John.Doe	Yes
787878787878	Opportunity Sync	Opportunity	N/A	20170411 17:06T05:00	20170411 20:06T05:00	Completed with errors	John.Doe	Yes

> **Note:** You should place the import source files in local folders while using EDLC. Remotely mounted files might cause performance issues.

Review Status of Import Jobs

To get the status of an import activity, enter the identifier value of the import on the command line. For example:> `java -jar oscdataloader.jar getlogs -target-url https://mypod.oracle.com -username importuser -log-type Exception -import-activity 012345678912345`

This command displays the detailed status of the matching import request (if no matching request is found, then an error is displayed). An example of the output contains the following information:

Object	Attachment Object	Status	Start Time	End Time	Number of File Splits	Records Read	Successfully Loaded	Errors Reported	Warnings Reported
Account	N/A	Completed	20170410 14:56T05:00	20170410 17:36T05:00	2	50,000	49,950	50	0

Retrieve Log Files

You can get the log files generated by an import activity using the `getlogs` command. For example,

```
> java -jar oscdataloader.jar getlogs -target-url https://mypod.oracle.com -username importuser -log-type
 Exception -import-activity 012345678912345
```

Log files retrieved by the `getlogs` command are stored in the `importlogs` folder by default. Log file of the External Data Loader Client is stored in the `oscdataloaderlogs` folder.

Import Job Statuses

The import job status indicates the status of the import job performed.

The import job can have one of these statuses:

- Completed - all batches have completed.
- Completed with Errors - one or more batches have completed with errors.
- In Progress - one or more batches are currently in progress.

- Unsuccessful - one or more batches are unsuccessful.
- Completed with Warnings - one or more batches have completed with warnings.

Command-Line Parameters

This topic describes the available command-line parameters for External Data Loader Client.

You can use the help option to see a list of all the commands that are available. For example, the following command lists all the command-line options.

```
> java -jar oscdataloader.jar help
```

You can get the options for each command, by using the option -h for that command. For example, the following command lists the options available for the submit command.

```
> java -jar oscdataloader.jar submit -h
```

If you're using a proxy server while importing using the EDLC, then you must specify the proxy parameters in the command-line call. The following example shows how:

```
java -Dhttps.proxyHost=host_name -Dhttps.proxyPort=80 -jar
oscdataloader.jar listobjects -target-url https://<your_pod> -u importuser -w
```

Here are the command-line parameters.

Command and Options (Preceded by Hyphen)	Description
`config`	The path where the configuration file is located.
-`desc`	The description of the import job submitted.
-delimiter	The delimiter used in your source file. The default value is COMMA_DELIMITER. Possible values are: • COMMA_DELIMITER: Indicates the comma delimiter • OTHER_CARET: Indicates the caret symbol delimiter • OTHER_COLON: Indicates the colon delimiter • OTHER_CLOSING_CURLY_BRACKET: Indicates the closing curly bracket delimiter • OTHER_CLOSING_PARENTHESIS: Indicates the closing parenthesis delimiter • OTHER_CLOSING_SQUARE_BRACKET: Indicates the closing square bracket delimiter • OTHER_EXCLAMATORY: Indicates the exclamatory mark delimiter • OTHER_MINUS: Indicates the minus delimiter • OTHER_OPENING_CURLY_BRACKET: Indicates the opening curly bracket delimiter • OTHER_OPENING_PARENTHESIS: Indicates the opening parenthesis delimiter • OTHER_OPENING_SQUARE_BRACKET: Indicates the opening square bracket delimiter • OTHER_PIPE: Indicates the pipe delimiter • OTHER_PLUS: Indicates the plus delimiter

Command and Options (Preceded by Hyphen)	Description
	• OTHER_QUESTION_MARK: Indicates the question mark delimiter • OTHER_STAR: Indicates the star symbol delimiter • OTHER_TILDE: Indicates the tilde symbol delimiter • SEMI_COLON_DELIMITER: Indicates the semicolon delimiter
`-df`	The date format that's used in your source CSV file. The default value is ORA_ZCA_US_FORMAT. Possible values are: • ORA_ZCA_EUROPE_FORMAT: EU - YYYY/MM/DD • ORA_ZCA_ISO8601_FORMAT: ISO 8601 - YYYY-MM-DD • ORA_ZCA_UK_CANADA_FORMAT: UK/Canada - DD/MM/YYYY • ORA_ZCA_US_FORMAT: US - MM/DD/YYYY
`-ds`	The decimal separator is used in your source file. The default value is Period (.). Possible values are: • , (Comma) • . (Period)
`-ecl`	Enable or disable custom business logic for the import job. The default value is false. Possible values are: • true • false
-encoding	The source file encoding. Possible values are: • ORA_ZCA_UTF8_ENCODING • ORA_ZCA_UTF16_ENCODING • ORA_ZCA_UTF16BE_ENCODING • ORA_ZCA_UTF16LE_ENCODING • UTF8
-export	Download the exported attachment files from the content management server to your local directory. For example, `java -jar oscdataloader.jar export -object Attachments -export-id 300100189790029 -target-url https://<your_pod> -output-path "C:\MyAttachments"` Make sure that the directory you provide as output path already exists with read and write permissions for the user performing the export.
`getlogs`	Get log files of an import activity.
`-help`	Display help text containing possible commands.
`help`	Show the usage message.

Command and Options (Preceded by Hyphen)	Description
`-high-volume`	Activate high-volume import for supported objects. By default, this option is set to true for all the supported objects. To use low-volume import, set this option to false. For example, `> java -jar oscdataloader.jar submit -high-volume false -input-file Account.csv -import-name "Account Import" -object Account`
`-import-activity` (required)	The import activity identifier of the job. This is used to track the status of the import job.
`-import -name`	The name of the import job.
`-input -file` (required)	The name of source CSV file. Provide a file name within 40 characters.
-latest	Indicates that the import jobs should be sorted by the latest creation date, when used with the `listimports` command. If this parameter isn't used, then the import jobs are listed sorted by the oldest creation date. For example, `> java -jar oscdataloader.jar listimports -target-url https://mypod.oracle.com -username importuser -latest` lists the imports sorted by the latest creation date. This parameter can take the value true or false. A value of true indicates that the imports are sorted by the latest creation date. By default, this parameter has the value false.
`--limit`	The number of import jobs to be listed by the `listimports` command. It can have possible values ranging from 1 to 500. Default value is 25. For example, `> java -jar oscdataloader.jar listimports -target-url https://mypod.oracle.com -username importuser -limit 100` lists the first 100 import jobs.
`listimports`	Get the list of import activities. You can get the list sorted by latest creation date by using the parameter `latest`.
`listobjects`	List the objects supported by External Data Loader Client.
`-log-type` (required)	Specify the type of log file to generate. Possible values are Exception, Error, Diagnostic, and All.
`-mapping-number` (required)	The mapping number.
-mode	The import mode which is to be used for the import job. The default mode is CREATE_RECORD. Possible values are: • CREATE_ONLY: Create records • CREATE_RECORD: Update and create records • DELETE_RECORD: Delete records • UPDATE_RECORD: Update records
`-nemail`	The email address to which the import job status would be sent.

Command and Options (Preceded by Hyphen)	Description
`-object` (required)	The object to import.
`-offset`	The import offset.
-s	The mode of scheduling the import job which determines whether the import job executes immediately or at a future date. The default value is ONE_TIME_IMMEDIATE. Possible values are: • ONE_TIME_IMMEDIATE: Immediate • ONE_TIME_SCHEDULE: Future
`savepassword`	Save credential in credential store wallet.

`split`	Split the import data file into multiple smaller files. The Split Size parameter is used to configure the split size that's used by EDLC. You can use either a low-volume split size or a high-volume split size.
	
	You can use the split records option to use low-volume split. Low-volume split has a default split size value of 50000 records. You can either set the default split size using the profile option ORA_ZCA_IMPORT_LOW_VOLUME_CHUNK_SIZE, or specify the split size using the split records command. Possible values are 10k,20k,30k,40k,and 50k.
	
	Example command:
	
	`> java -jar oscdataloader.jar submit -input-file Account.csv -import-name "Account Import"-object Account -mapping-number 123565 -split-records 30000`
	
	You can use the high volume split option to use high-volume split. High-volume split has a default split size value of 200000 records. You can either set the default split size using the profile option ORA_ZCA_IMPORT_HIGH_VOLUME_CHUNK_SIZE, or specify the split size using the split records command. Possible values are 100k,200k,300k,400k,and 500k.
	
	Example command:
	
	`> java -jar oscdataloader.jar submit -input-file Account.csv -import-name "Account Import" -object Account -mapping-number 123565 -high-volume-split-records 200000`
	
	Note:
	You can use this parameter when the default values slow down the performance or if an optimum size is recommended for the data pattern being imported. This parameter is provided to reduce the number of records that need to split for each EDLC job.

-st	Scheduled future time stamp for an import activity job.
`status`	Retrieve the status of the specified import.
`submit`	Submit file import request in Sales and Fusion Service.
`-target-url` (required)	The environment against which the command is run.

<table>
<tr><th>Command and Options (Preceded by Hyphen)</th><th>Description</th></tr>
<tr><td><code>-tsf</code></td><td>The time stamp format used in your source file. The default value is ORA_ZCA_US_FORMAT. Possible values are:
<code>ORA_ZCA_CANADA_FORMAT: Canada - DD/MM/YYYY hh:mm:ss PM</code>
<code>ORA_ZCA_EUROPE_FORMAT: EU - YYYY/MM/DD 24:mm:ss</code>
<code>ORA_ZCA_ISO8601_FORMAT: ISO 8601 - YYYY-MM-DDThh:mm:ss.sss+/-hh:mm</code>
<code>ORA_ZCA_UK_FORMAT: UK -DD/MM/YYYY 24:mm:ss</code>
<code>ORA_ZCA_US_FORMAT: US - MM/DD/YYYY hh:mm:ss PM</code></td></tr>
<tr><td><code>-username</code> (required)</td><td>Specify the user name of the user running the command.</td></tr>
<tr><td><code>-wallet</code></td><td>The Credential Store that holds one set of user credentials (user name and password pair).</td></tr>
<tr><td><code>validate-settings-for-performance</code></td><td>Validate settings to check high-volume import performance. You can use this parameter when you have performance issues while import importing data in high volume for Account, Contact, Address, Relationship, Organization, and Person objects. To validate the settings, you must pass this parameter as “true”. When the parameter is set to “true”, then import job validates the value of the following profile options to determine if the profile options have been set to the recommended values.
<table>
<tr><th>Profile Option</th><th>Recommended Value</th></tr>
<tr><td>HZ_POST_IMPORT_GNR_INVOKE</td><td>N</td></tr>
<tr><td>ZCH_ENABLE_SURVIVORSHIP</td><td>N</td></tr>
<tr><td>ORA_HZ_ENABLE_SIMPLIFIED_IMPORT_STATS</td><td>Y</td></tr>
<tr><td>ZCA_BATCH_ASSIGN_ON_BULK_IMPORT</td><td>N</td></tr>
<tr><td>ZCA_IMPORT_PURGE_ON_JOBCOMPLETION</td><td>Y</td></tr>
<tr><td>ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION</td><td>Y</td></tr>
<tr><td>ZCA_IMPORT_PURGE_FROM_UI</td><td>Y</td></tr>
<tr><td>ZPM_ENABLE_PARTNER_EVENTS</td><td>N</td></tr>
<tr><td>ZCA_PUBLIC_BUSINESS_EVENTS</td><td>N</td></tr>
<tr><td>ZCX_CUSTOM_OBJECT_EVENTS</td><td>No</td></tr>
<tr><td>HZ_ENABLE_ENTITY_EVENTS</td><td>No</td></tr>
</table></td></tr>
</table>

<table>
<tr><th>Command and Options (Preceded by Hyphen)</th><th>Description</th></tr>
<tr><td></td><td><table><tr><th>Profile Option</th><th>Recommended Value</th></tr><tr><td>HZ_INVOKE_OBJ_WF_ON_TRACKING</td><td>No</td></tr></table></td></tr>
</table>

10 Overview of Export Management

About Export Management

You can use Export Management to move data out of Oracle Applications Cloud in the form of CSV files.

To export data, you start by creating an export activity. As part of the export activity, you select a parent object and its relevant child objects. You also must define filters on these objects to specify the records you want to export.

Scenarios for Export

You may want to export data in the following scenarios:

- You might want to move data out of Oracle Applications Cloud into another 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 data as per your requirements.
- You may want to identify the unique identifiers of an object such as Party ID or Party Number. You can use this information to update an object record.

You can schedule an export either immediately or at a future date. If you schedule it for a future date, then provide the start date and time while defining the export activity.

> **Note:** Currently recurring export isn't supported. You can however use the Export REST resource to schedule recurring export activities through REST API. For more information see REST API for CX Sales and Fusion Service.

Using Export Filters

You can define the conditions for the records to export in the export filter. The exported data sets contain only those records that match the specified filter criteria on the parent/child object. It is recommended that you use multiple filters to reduce the number of records to export.

You can create a filter by navigating to **Tools** > **Export Management** > **Export Objects** and clicking on the **Display Name** link for the export object. On the **Manage Filters** page, click the **Create Filter** button to create a filter. On the **Script Edit** page, enter the filter name, filter parameters, and the order by clause if required. You can reuse an existing filter by selecting a value from the **Existing Filters** drop-down list. Once you're done with your changes, click **Validate Script** and then click **Save and Close** to save your new filter. You can also create a filter while creating an export activity, on the **Map Fields** page.

You can delete a filter on the **Manage Filters** page, by clicking the delete icon for your filter under the **Delete Filter** column. Note that you can delete only the filters created by you and those that aren't used in an active export job.

Split Export Data

There are no limits to file size for exporting data. However, you can split the exported data set based on a split size. You can enable split from the UI by checking the Enable Split check box in the set up page and select the split size. The default is 100k. You can specify the split size in multiples of 100k records, ranging from 100k to 1000k. Each CSV file can contain a maximum of 50k records. Hence, the exported data will be split into two CSV files after 50k records. The CSV files will then be zipped together and exported.

For example, if an export job fetches 300k records and split is enabled with a split size of 200k, then 2 export ZIP files will be generated. The first one will contain a total of 200k records which will be divided into 4 CSV files each with 50k records. The second ZIP file will contain a total of 100k records which will be divided into 2 CSV files each with 50k records.

Related Topics

- How do I export data?
- How You Monitor Export Activity

How do I manage export objects?

Export objects correlate with tables in Oracle Applications Cloud. Understand export objects and their attributes to manage the data that you want to export.

Supported Objects

You can export these objects and their child objects using Export Management:

- Access Groups
- Account
- Action
- Action Plan
- Activity
- Asset
- Assignment Rule Candidate
- Assignment Rule Condition
- Assignment Rule
- Assignment Rule Set
- Billing Contract Milestone
- Business Plan
- Campaign
- Case
- Compensation Plan
- Compensation Plan Component
- Compensation Plans Flex
- Competitor
- Condition Attachment
- Condition of Approval Comment
- Condition of Approval Transaction

- Condition Comply Period
- Contact
- Contract
- Contests
- Deal Registration
- Duplicate Resolution Request
- Geographies*
- Goals
- Household
- HRHelpDeskRequest
- Hub Source System Reference
- Inbound Message
- Incentive Compensation Performance Measure
- Incentive Participant
- Incentive Participant Goal
- Incentive Participant Role Assignments
- Interaction
- Interaction Participant
- KPI
- Linked Party
- MDF Budget
- MDF Claim
- MDF Request
- Nonduplicate
- Note
- Objective
- Opportunity
- Organization
- Partner
- Partner Programs
- Performance Measure Flex
- Performance Measure Rate Dimensional Input
- Performance Measure Score Card
- Plan Component
- Plan Component Flex
- Plan Component Performance Measure
- Plan Component Rate Dimensional Input
- Plan Component Rate Table
- Price Book Header

- Product
- Product Group
- Program Enrollments
- Promotion
- Queue
- Relationship
- Resolution Link
- Resolution Request
- Resource
- Resource Capacity
- Sales Forecast Quota
- Sales Lead
- Sales Orders
- Sales Territory
- Sales Territory Quota
- Self-Service Role
- Service Profile
- Service Profile Contact
- Service Request
- Standard Lookups
- Standard Text
- Standard Text Folder
- Standard Text User Variable
- Subscription
- Template
- Territory Geographies. For more information see Export Territory Geography Zone Hierarchies? (Doc ID 2853475.1) on *My Oracle Support*.
- Transaction
- Trees
- Wrap Up

Note: *Legal Note:* By exporting the Geographies data from the Oracle environment to Your environment, You agree that (a) Oracle is granting You only a restricted right to download the exported Geographies data specifically for Your use with the Oracle Fusion services; (b) the Geographies data may not be used, transferred, or uploaded for any other purposes; and (c) except for the restricted right granted in (a), all provisions of the Oracle Cloud Services Agreement (CSA) or Schedule C, as applicable to You, remain in full force and effect, including specifically section 3.4 thereof.

Export Object Details

Click **Tools** > **Export Management** > **Export Objects.** To see the details of an export object, select it on the **Export Object Details** page. Here are the details that you see about each exportable object:

Column	Description
Display Name	The object as it's called in the user interface.
Language Independent Code	The internal name of the object.
Parent Object	The parent object of the selected object. If there are multiple parents for an object, they're shown separated by commas.
View Hierarchy	Clicking on the View Hierarchy icon shows the hierarchy between the parent and child objects in a graphical format.
User Key	The attribute or the group of attributes that's used to uniquely identify a record.
Required Attributes	The attribute or the group of attributes for which values are required to create a record. These can't be NULL when updating a record.

Target Attributes

Here are the details that you see for each target attribute.

Column	Description
Display Name	Name of the target attribute in the user interface.
Attribute Name	Internal or field name of the attribute.
Required	Indicates whether the attribute is mandatory or not.
Default Value	The default value for the attribute, if any.
Type	Data type of the target attribute.
Length	Maximum allowed length for the target attribute values.
Description	A short description of the target attribute.

Export Inactive and Merged Data

You can export inactive and merged accounts, contacts, households, organizations, and persons using export management. You don't need to rely on data model queries to fetch the deleted or merged records.

Note: To export inactive records, you need to explicitly add the condition to the criteria, or else only the active records will be exported. For example, I for Inactive and M for merged. All associated child records (active or inactive) will be exported irrespective of their status, if no criteria is added.

Export Queues

This topic describes the different infotiles displayed on the Manage Exports page of the Export Queue tab.

Export Queue

The following infotiles are displayed on the **Manage Exports** page:

- All Exports: This infotile displays the count of active, completed, and unsuccessful exports submitted by all users. Click to see the exports created by all the users and in all possible statuses.
- Active Exports: This infotile displays the count of exports submitted by all users that are either in progress or in queued status. Click to see the active exports created by all the users.
- My Completed Exports: This infotile displays the count of exports submitted by the current user that are either successful or failed with warnings or errors. Click to see the completed exports created by the current user.
- Unsuccessful Exports: This infotile displays the count of unsuccessful exports submitted by all users. Click to see the unsuccessful exports created by all users.

Note: The export activity records appear in the queue for thirty days, after which they're removed. The exported ZIP files and diagnostic files are removed from the server on the 7th day of the export.

Export Details

You can view more details about the exports on clicking the infotiles. The following details about the export are displayed:

Column	Description
Name	The name of the export job. Click to go to the **Export Status** page.
Object	The object exported.
Status	The status of the export job. For more information about the statuses, see the topic How You Monitor Export Activity in the related topics section.
Start Time	The start date and time of the export.
End Time	The end date and time of the export.

Column	Description
Submitted By	The user who submitted the export.
Exported data file	The link to download the exported data file in ZIP format.

You can filter the export using any of the columns in the preceding table. You must select the filter value from the **Search** drop-down list and enter the criteria in the adjacent text box.

Related Topics

11 Export Your Data

How do I export data?

You can export your object data using the Export Management option from the Tools work area. This topic is your guide to exporting data.

You can find the list of objects supported in Export Management in *How do I manage export objects?*

To export data:

1. Click **Tools** > **Export Management**.
2. On the **Manage Exports** page, click the **Create Export Activity** button.
3. On the Enter Export Options page, enter values for each of the following fields:

Field	Description of the value
Name	The name of the export activity.
Object	The object to export. You must select the parent or child object from the drop-down list. If you can't find an object in the drop-down list, then click the Search link. In the **Search and Select** dialog box, enter the object name in the **Object** text box and click the Search button. Select your object from the result list and click **OK**. You can also use the advanced search option by clicking the **Advanced** button. Here you can search based on various filter criteria such as object name, attachment supported, creation date, and so on. **Note:** If the object you're exporting isn't listed then verify if you have the roles and privileges required to export the object. For information on the roles, see the topic Roles Required for Import and Export Management referenced in the Related Topics section. The object must not include any field with display name length greater than 120 characters. Your export job may fail if it includes a field with display name length greater than 120 characters.
Description	The optional description of the export activity.
File Name	The name of the export file to generate in ZIP format. This field is populated based on the object and date time stamp.

Field	Description of the value
Export Attachments	Select to export the attachments related to the object. This option is enabled only if the selected object supports attachments.

4. Optionally to set additional export configurations, click the **Advanced Options** section. Here you can configure settings in the **Output File**, **Export Options**, or **Create Schedule** sections.

    - Following are the options in the Output File and Export Options regions:

Option	Description	Default Value
Delimiter	If your file doesn't use a comma to separate values, then select the correct delimiter in the **Delimiter** drop-down list. Possible values are: - Caret Symbol - Closing Curly Bracket - Closing Parenthesis - Closing Square Bracket - Colon - Comma - Exclamatory Mark - Minus - Opening Curly Bracket - Opening Parenthesis - Opening Square Bracket - Pipe Symbol - Plus - Question Mark - Semi-Colon - Star Symbol - Tilde Symbol	Comma
Escape Special Characters	If selected, then RFC4180 format is used, and quotes are escaped with another set of quotes.	Deselected
Decimal Separator	The decimal separator used in your export file. Possible values are Comma and Period.	Period
Date Format	The format of the date fields in your file. Possible values are:	US - MM/DD/YYYY

Option	Description	Default Value
	- EU-YYYY/MM/DD - ISO 8601 - YYYY-MM-DD - UK/Canada - DD/MM/YYYY - US - MM/DD/YYYY	
Time Stamp Format	The format of time fields in your file. Possible values are: - Canada - DD/MM/YYYY `hh:mm`:ss PM - EU - YYYY/MM/DD 24`:mm:ss` - ISO 8601 - YYYY-MM-DDT`hh:mm:ss sss+/-hh:mm` - UK - DD/MM/YYYY 24:mm:ss - US - MM/DD/YYYY `hh:mm:ss` PM	US - MM/DD/YYYY `hh:mm:ss` PM
File Encoding	The format in which the characters within your source file are encoded. Possible values are: - Chinese Simplified - GB, CP936 - Chinese Traditional - CP950 - Eastern European - Win, CP1250 - Greek - MS Windows, CP1253 - Japanese - Shift-JIS, CP932 - Unicode - UTF - 8 - Unicode - UTF - 16 - Unicode - UTF - 16BE, Mac, Unix - Unicode - UTF - 16LE, MS Windows - Western European - Win, CP1252	Unicode - UTF - 8
End of Line	The character used to indicate end of line in the export file. Possible values are: - Carriage Return - Carriage Return and Line Feed - Line Feed	Line Feed
Quote Character	The character used to indicate a quote. This field is read-only.	N/A
Language Independent Header	Select to export column headers. If you're modifying the exported data manually, then exporting column headers help in automatic mapping during the reimport process.	N/A

Option	Description	Default Value
Notification Email	The email to send export-processing notifications. The user submitting the export receives an email notification automatically. You use this field to specify any additional recipients. If you want to have more than one email recipient, separate the email addresses with a comma or semicolon. You can also specify a mailing list address so that a large number of recipients can be notified. If you don't want to receive the notification, then set the profile option ORA_ZCA_IMPEXP_ENABLE_EMAIL_NOTI to 'N' at user level.	N/A
Enable Split	Select to split the export data set based on a specified record count. On selecting this check box, you can see the **Split Size** drop-down list, with a default value of 100k. You can specify the split size in multiples of 100k records, ranging from 100k to 1000k. The exported data is split into multiple CSV files, and each file has a maximum of 50K records. You can further split the exported data into multiple ZIP files, based on the specified split size. For example, if your export job retrieves 300k records and split is enabled with a split size of 200k, then 2 export ZIP files are generated. The first ZIP file contains 200k records which is divided into 4 CSV files each with 50k records. The second ZIP file contains 100k records which is then divided into 2 CSV files each with 50k records.	N/A

- In the **Create Schedule** region, you can schedule the export to run either immediately or at a future date. If you select a future date, then provide the date and time to start the export.

You can save the Advanced Options for subsequent reuse by clicking on the Save advance options link in the UI. The options will be retained till you click on the Reset link and reset the options to application defaults.

> **Note:** All fields except Schedule Mode and Schedule start time will be saved.

5. Click **Next**. On the **Map Fields** page you can see the exportable object, its child objects, and the associated attributes. The **Export Mapping** drop-down list shows the maps that were used in earlier export jobs. You can select an existing mapping from the drop-down list and click **Apply**.

   You can save your export maps for future use by clicking on the pencil icon (Save As) in the Create Export Activity page. You can also mark your maps as private by checking the **Private Map** check box. Private maps can only be viewed and reused by the user who created and saved the map. Maps marked as private won't get purged by the daily purge job.

   > **Note:** Your maps will only be saved once the job is completed.

   To select and apply your saved maps, check the **My Maps** check box, select the required map from the **Export Mapping** drop down and click **Apply** in the Create Export Activity page.
6. You can select the child objects to export by selecting the **Enabled** check box. Selecting the **Enabled** check box for a child object displays the associated attributes in the **Available Fields** section. You can select the attributes to export by double-clicking the attribute in the Available Fields list. Alternatively, you can move the attribute from Available Fields list to the **Selected Fields** list. If you select any formula fields for export, it might impact your export performance.
7. You must provide a filter criterion for at least the top-level object. To filter the records to export using conditions, click the **Filter Name** icon. On the **Filter Name** dialog box, you can create the filter for the export attributes using the operators AND, OR, >, <, =, and !=. On the **Fields** tab select the attribute and click the **Insert** button. In the Script Edit window, provide the filter conditions for the selected attribute. After creating the filter criteria script, click **Validate Script**. Click **Save and Close** to save the filter.

   > **Note:** You must use GeographyCode='TM' filter to export the Zone Hierarchies. To export both Zone Hierarchy information and Geography Country Information, you need to use filter GeographyCode='TM' Or CountryCode='DE'. For more information see *How to Use Export Management to Export Territory Geography Zone Hierarchies?*

8. Click **Next**. On the **Review and Submit** page, review the export activity configuration. If you want to change any configuration, then click the **Back** button. Submit to activate the export activity. After the export activity completes, clicking the **My Completed Exports** infotile shows your export status. Click the ZIP file link in the **Exported Data File** column to download the exported file.

   You can cancel the export by clicking the Cancel icon in the Manage Exports page when the job status is Paused, Queued for Export, Preparing data to Export, or Exporting Data.

   > **Note:** The cancel job option is available for the logged in user and the hierarchy user only when the profile option ORA_ZCA_IMPEXP_RESTRICT_USERACCESS is enabled.

> **Note:** CSV String Escape: By default, the escape character is a " (double quote) for CSV-formatted files. If a value contains a comma, a newline character, or a double quote then the string must be enclosed in double quotes. For example: "Newline char in this field \n". A double quote must be escaped with another double quote. For example: "The double quote character "" is offensive.".

Note: By default, you can't view the Personally Identifiable Information(PII) such as mobile numbers in the exported data. To view this information, follow these steps:

1. Navigate to **Tools** > **Security Console**.
2. Search for the role ORA_MOT_QUOTA_EXPORT_MANAGEMENT_DUTY.
3. Edit role and click the **Data Security Policies** link.
4. Click the **Create Data Security Policy** button, and add a new data security policy on the database resource **Trading Community Contact Point** with the following details.
    - Policy Name: Custom Grant on Person Contact and Mobile Phone Data (you can provide any name)
    - Database Resource: HZ_CONTACT_POINTS
    - Data Set: All Values
    - Actions: View Trading Community Person Contact, View Trading Community Mobile Phone Number
5. Click OK to save and navigate to **Summary** step to review and save changes.

Related Topics

- How You Monitor Export Activity
- Export Queues
- What are the roles required to import or export data?

How You Monitor Export Activity

This topic explains how to monitor export activities and view their statuses.

View the Export Status

On the **Manage Exports** page, click the export activity name link to see additional information about the export activity. The Export Status page contains the following sections:

- Status Bar
- Details
- Export Attachments

The Export Status Bar

The status bar shows the progress of the export activity in a graphical format. It shows the following stages during the export process:

1. Queued for Export: The export request is queued for processing, and is waiting to begin execution.
2. Preparing data for Export: The data are loaded in the temporary staging table for further processing.

3. Exporting data: The data from the target objects are loaded into the export files (CSV).
4. Completing export activity: The export data have been loaded in the source files, and cleanup tasks, such as the generation of log files, are in progress.
5. Completed with errors: The export activity has completed with errors.
6. Completed with warnings: The export activity has completed with warnings.
7. Unsuccessful: The export activity was unsuccessful.

Activity and Record Details

The **Activity Details** section shows the name of the export activity, export job identifier, object exported, and the name of user who submitted the export. The section on date and time displays the start and end times, and the time taken to complete the export activity.

The **Record Details** section displays the number of records estimated, number of records exported, and the number of records with errors.

The object must not include any field with display name length greater than 120 characters. Your export job may fail if it includes a field with display name length greater than 120 characters.

Export Attachments

You can generate the diagnostics and log files from the **Action** menu. The **Export Attachments** section displays the list of files associated with this export activity in tabular format. The **Actions** column in this section lets you either download the file or view more details. These files include the diagnostics and log files generated.

> **Note:** The export data is stored on the UCM server for some time before it's purged. The duration after which export data should be purged is set in the profile option ZCA_EXPORT_UCM_PURGE_DURATION. The default value is 30.

How You Monitor Export Activities Using REST APIs

This topic explains how to receive completion notification through REST resource and also avoid the need to constantly keep checking the export status.

To receive export completion notification through REST service, you must define the REST service endpoint in Application Composer. You can configure and register your REST endpoint to receive notifications whenever your export job completes.

Register an External REST Endpoint in Application Composer

To register an endpoint for notification:

1. Create and enter into a sandbox by navigating to **Configuration** > **Sandboxes** > **Create Sandbox**.
2. Navigate to **Configuration** > **Application Composer** > **Web Services.** Note that this option is available only when you're inside the sand box.
3. You can edit the existing endpoints, or create a new endpoint such as `ExternalEndPoint1`, by clicking the Create icon.
4. Enter the name of the endpoint and the URL, and select the authentication scheme. For example, your URL can be in the format https://servername/ic/api/integration/v1/connections/cbveTest.
5. Select and configure the POST method by clicking the check box for POST. Currently only POST method is supported for the Export Notification feature.

6. Select and provide the code samples for the request and response payloads. Following is the sample for request and response payloads:

```
{
"items": [],
"count": 0,
"hasMore": false,
"limit": 25,
"offset": 0,
"links": [{
"rel": "self",
"href": "https://servername/ic/api/integration/v1/connections/cbveTest",
"name": "ExternalEndPoint1",
"kind": "collection"
}]
}
```

7. Click **Save and Close**.
8. After making the changes, publish the sandbox to commit your changes.

Validate the Endpoint

You can validate the REST endpoint to ensure that your REST web service configuration in Web Services in Application Composer is correct and the export process can call the endpoint successfully. To validate your REST endpoint and set an endpoint as default:

1. Navigate to **Tools** > **Export Management** > **Export Configuration** > **REST Notification**.
2. Here, select REST Notification as the notification type, and select the endpoint you registered from the **Notification Endpoint** drop-down list. In our example, select `ExternalEndPoint1`.
3. To make this connection as the default one while creating export jobs, select the **Set as default** check box.
4. To validate, click the Payload Details section, and click the Validate REST Endpoint button. If your endpoint is valid, then you see one of the following response statuses in the Response text box:
   - 200
   - 201
   - 202
   - 204

   Any other response status indicates that the endpoint is invalid.

Create the Export Activity and Monitor the Status

1. Navigate to **Tools** > **Export Management** > **Create Export Activity.**
2. Create the export activity, enter the name, and select the object to export.
3. Click the **Advanced Options** section and select the notification endpoint `ExternalEndPoint1` from the **Notification Endpoint** drop-down list. If you don't want to receive the notification, then select a blank value in the drop-down list.
4. Click **Next** and select the attributes to export on the **Map Fields** page. Create a filter for at least the top-level object, and click Next. For more information on creating an export activity, see the topic Export Data.
5. Review your export configurations and submit the export job. Once you submit the export, you can monitor the status by accessing the configured endpoint.
6. Alternatively, you can verify whether the notification is submitted by downloading the log files. The last entry in the file indicates the status of notification.

Export Notification in REST

You can use the RestNotification attribute to specify your notification endpoint while creating your export activity using REST. For example, you can use the following sample payload to create your export activity:

```
{
 "Name": "Account_Export",
 "ExportObject": "Account",
 "ExportFilterCriteria": "OrganizationName IS NOT NULL",
 "ExportFileName": "Account.zip",
 "Activate": "YES",
 "RestNotification": "ExternalEndPoint1"
}}
```

The following table describes the behavior when you don't provide the REST notification endpoint.

REST Notification Value	Endpoint Used for Export Job	REST Notification Behavior
null	Default endpoint is selected	REST notification is sent to the default REST endpoint.
REST notification not passed	Default endpoint is selected	REST notification is sent to the default REST endpoint.
""	No REST endpoint is selected	No REST notification is sent.

Related Topics

- How do I export data?

How do I export attachments?

This topic explains how to export and download the object attachments to your local directory. Here is a list of objects that support exporting of attachments:

- Account
- Activity
- Assets
- Competitor
- Contact
- ConversationMessage
- DealRegistration
- Household
- HRHelpDeskRequest
- InternalServiceRequest
- Opportunity

- Partner
- PartnerContact
- Product
- ProductGroup
- ServiceRequest
- WrapUp

You can export the attachments in two steps:

1. Export the object records and the attachment information based on the selected search criteria of the object.
2. Download the attachment files from the content management server using the External Data Loader Client tool.

Export the Object Records and the Attachment Information

To export the object records and the attachment information:

1. Click **Tools** > **Export Management**.
2. On the **Manage Exports** page, click the **Create Export Activity** button.
3. On the **Enter Export Options** page, enter the export activity information such as export name, export object, and the file name. For more information on exporting data, see the topic Export Data.
4. Select the **Export attachment** check box to enable exporting the object attachments. You can optionally enter the advanced configuration options. Click **Next**.
5. On the **Map Fields** page, you can select the attributes to export by dragging them from the **Available Fields** section to the **Selected Fields** section. The **Export Mapping** drop-down list shows the maps used in earlier export jobs. You can select an existing mapping from the drop-down list and click **Apply**. You can select the **Enabled** check box to export the child object attributes.
6. You must provide a filter criterion for at least the top-level object. To filter the records to export using conditions, click the **Filter Name** icon and enter the filter criteria for your object records. Click **Next**. On the **Review and Submit** page, review the export activity configuration and click **Submit**.
7. After the export activity completes, clicking the **My Completed Exports** infotile shows your export status. Click the ZIP file link in the **Exported Data File** column to download the exported file.

Download the Attachment Files

The ZIP file you downloaded in the previous step contains the following files:

- The attachment information CSV file - this file contains information about the attachment records such as content ID, REST resource URL, attachment file name, and so on.
- Attachment download instructions file - this HTML file contains the export details, and the sample EDLC command to download the attachments.

You can use the export command of EDLC to download the attachment files from the content management server to your directory. For example, use the following command to download your attachments exported from the previous step:

```
java -jar oscdataloader.jar export -object Attachments -export-id {export-id} -username {username} -target-url {environment-url} -output-path {output-directory-path}
```

Following are the parameters used in the command:

Parameter	Description
-objects	Indicates the object type exported. Currently this parameter supports only the value Attachments.

Parameter	Description
-export -id	Job ID of the export job.
-username	User name of the user submitting the export command. This must be the same user who submitted the export activity.
-target-url	URL of the environment.
-output-path	Directory path of the folder where the attachment files and reports are downloaded. The reports folder contains details about the attachment files exported, such as their status and error details if any This should be an existing directory with read and write permissions for the user performing the export.

You can view the details of all available parameters and their descriptions using the command export -help.

Related Topics

- How do I export data?
- Overview of External Data Loader Client
- Command-Line Parameters

12 Round-Trip Export-Import

Round-Trip Feature

This topic gets you started on the round-trip feature of Import and Export Management.

It explains how to

- Export the data from one instance of CX Sales and Fusion Service
- Makes any changes in the exported CSV files as required
- Reimport the updated CSV files either into the same instance or another instance

You can do this task without manually mapping the source file and the object attributes.

Export Data

You can use Export Management to export the data fields of an object. You can select the fields that you want to export. If you're importing the data into another instance of CX Sales and Fusion Service, then select the Enable Round Trip check box in the Advanced Options section of the Create Export page. This generates the header row in the exported CSV file that enables the round-trip feature. Don't modify the header row values in the CSV file.

You can export a single object and its child objects with attributes for each export activity. If the exported ZIP file contains the parent and child record files, then import the parent CSV file followed by the child CSV file.

You can either schedule the export process at a future date or run it immediately. The export activity generates a ZIP file that you can download.

Import Data

You can import the exported data into either the same instance or another instance of CX Sales and Fusion Service. You must use the CSV file extracted from the downloaded ZIP file. Don't edit the header row in the CSV file.

You import the data using the Import Management feature in the User Interface. During the import, the automatic mapping feature automatically maps the columns in your source file to the application attributes.

> **Note:** While doing round trip import, you need to remove the attributes FileNameSystaskId and FileRecordNum from the CSV.

Related Topics

- How do I export data?
- How do I import data?

Export and Import Account Data between CX Sales and Fusion Service Instances Using the Round-Trip Feature

This example shows how to export the Account object from one instance of CX Sales and Fusion Service and import the exported data into another instance of CX Sales and Fusion Service using the round-trip feature.

You can do this without manually mapping the source file and the application attributes.

Export Data from CX Sales and Fusion Service Using Export Management

You can export Account object records from CX Sales and Fusion Service using Export Management as follows:

1. Create an export activity for the Account object as explained in the topic Export Data.
2. Click the Advanced Options section. Select the **Enable Round Trip** check box. This enables the round-trip support for your export activity. This option generates the header row in the exported CSV file and is responsible for automatic mapping during the import. So don't modify any of the header row values. Review and submit the export activity.
3. On the **Manage Exports** page, you can see the status of your export. Once the export activity completes, click the My Completed Exports infotile to see the status of your export.
4. Click the link under the Exported Data File column to download your exported ZIP file. Save the ZIP file, and extract the CSV file.

Import Data from CX Sales and Fusion Service Using Import Management

You can import data into CX Sales and Fusion Service instance using the following steps:

1. Create an import activity for the Account object as explained in the topic Import Data. Browse and select the CSV file that you had exported in the last section.
2. Click Next to get the Map Fields page. On the **Map Fields** page, the round-trip feature automatically maps the source file attributes for you.
3. Click Next to review the import configurations and Submit.
4. On the Manage Imports page, you can see the status of your import. Once the import activity completes click the **My Completed Imports** infotile to see the status of your import.

Related Topics

- Round-Trip Feature
- How do I export data?
- How do I import data?

13 Best Practices and Troubleshooting

What are the best practices for high volume data import?

Here are some best practices for high volume data import.

At some time, you might need to load large volumes of data into your CX Sales and B2B Service instance. For example, during initial roll-out, expanding use of CX Sales and B2B Service to other users or divisions, or expanding use of CX Sales and Fusion Service to include other object types (for example, adding support for Service objects).

When loading large volumes of data to CX Sales and Fusion Service, one of the key considerations is the time taken to import data. Reducing the amount of time required to import a large volume of data is crucial, if you have a limited period of time to run the data imports (for example, during a weekend migration). Oracle recommends certain best practices that you can use to improve the performance of the data import.

Actual throughput varies for users based on a number of factors including the volume of data contained in each record, the number of relationships being created during data import, and the number of records in your source file.

Before executing the data import in a production environment, Oracle recommends that you perform these functional validation and performance optimization procedures in your test environment:

- Data Cleansing
- Validate Functional Import
- Optimization Process

Performing these exercises in your test environment ensures that these exercises don't impact existing operations or the data in your production environment.

Data Cleansing

Before proceeding with high volume imports, you need to clean the data being imported thoroughly. Ensuring that your data is in the correct format reduces the number of errors that are encountered during data import. This benefits your overall throughput in two ways:

- Processing time isn't wasted on attempting to import records that can't be imported.
- You don't have to review error logs, fix issues, and reimport data. It costs less to clean your data before attempting a data import than it does to fix issues that arise during data import.

When cleaning the data, note the following:

- Field Length - ensure that the data doesn't exceed the maximum field length in OSC
- Data Type - ensure that the data is of the correct type for the field to which it's being imported in OSC
- Required - ensure that a value is provided for all mandatory fields
- Conditionally Required - in some cases, a value is required based on the value provided for another field (for example, for Opportunity a Close Date is required if the Status of the Opportunity is set to Closed)

- Foreign Keys - provide a valid value for foreign keys to create relationships between records. The foreign keys can vary for every object.

By ensuring that your data is clean, you can avoid many issues associated with importing your data from your legacy application into CX Sales and Fusion Service.

Validate Functional Import

To verify that you have successfully cleaned your data, Oracle recommends that you validate your import in your test environment with a small set of data. Follow these guidelines to validate the functional import:

- Before you import large volumes of data, ensure that your import completes successfully and that the resulting data matches your expectations. This includes ensuring that the data is imported to the correct object, fields have been mapped correctly, and relationships are imported properly.
- Import a small number of records including values for each attribute. Oracle recommends that you use the smallest set of input data possible that can still save the variations present in your full data set.
- Identify any data issues that are reported in the import log files. Fix any specific issues reported for rows with errors. If a row doesn't have an error reported, then don't reimport that row. After you resolve all the issues and successfully import your subset of data, apply any changes to your larger data set (for example, if you determine that your time stamp format is incorrect, fix this for all records in the input data file for your full data set).

Optimization Process

Importing high volume of data is a project and should be included in the project plan for your implementation. You need to allocate time for the actual import of data and for the design and optimization of the import process for your data set.

When optimizing the data import, you identify the number of records to be included in your input data file as well as the number of concurrent import activities that can be activated. You trigger concurrent import activities by running more than multiple data import operations simultaneously. The number of concurrent import activities is the number of data imports that are running and haven't yet completed. Running import activities serially or running too many import activities concurrently can lower your throughput. Finding the right values for these two parameters is a key aspect of designing your import process. There's no right answer for every situation. Every data set is different; you need to repeat this process for any new data import operations that you plan to perform.

> **Note:** Don't import more than 100,000 records in a single import operation or perform more than five concurrent import activities.

Oracle recommends that you adhere to this process when planning high volume data import:

- Establish baseline performance
- Scale up import volume
- Optimizing Concurrent Import Activities

Each of these steps is explained in greater detail.

Establish Baseline Performance

Oracle recommends that after you have cleaned your data and validated that your import is functionally correct, you should begin the process of scaling up your import volumes. The first step in this process is to establish a performance baseline. This involves performing a set of serial imports using a high volume of records.

Oracle recommends that you begin by importing a small number of records (a few hundred to a few thousand) in a single import activity. For example, you may import 10,000 records using four import activities of 2,500 records each. After these data import activities have completed, you should note the time required to complete the import of records and calculate the overall throughput (number of records imported per second).

> **Note:** You may also want to track the time between data import operations.

Scale Up Import Volume

After you have established a baseline, you can increase the number of records in your input file and begin to run multiple imports concurrently. Scale the volumes in a controlled manner and note your throughput at every step.

Optimize Concurrent Import Activities

You can run multiple import activities simultaneously. This can improve your overall throughput versus serially running the same imports. The optimal number of concurrent import activities can vary across objects and use cases; you must perform testing prior to beginning your production data load to identify the most efficient data import plan.

You can run multiple data import activities concurrently by submitting a new import activity while the first activity is still being processed. CX Sales and Fusion Service processes both import activities without waiting for the first activity to complete before starting the second activity. You can continue to run multiple data import activities concurrently for additional data import activities.

For example, you first run a test to measure the throughput when importing 200,000 records using four serial activities of 50,000 records each. You may then run a test to import a total of 600,000 records as shown in this table:

Test Number	Total Number of Records	Number of Records per Activity	Number of Activities	Concurrency	Average Throughput
1	200,000	50,000	4	Serial	
2.1	100,000	50,000	2	Concurrent	
2.2	200,000	50,000	4	Concurrent	
2.3	300,000	50,000	6	Concurrent	

At every step, you should note the average throughput. If you reach a point where throughput is decreasing, then you may have exceeded your optimal concurrency. You may want to repeat the tests to ensure that you have sufficient data points to draw a correct conclusion.

You can import file attachments to some record types. Importing attachments impacts import performance and should be considered when planning your data import activities.

You can also adjust the data import based on the number of records in your input data file. For example, start with 25,000 records and increase by 25,000 records with every run. As you increase the number of records in each batch, note the average throughput. If you reach a point where throughput is decreasing, then you may have exceeded your optimal number of records. Oracle doesn't recommend importing more than 100,000 records in a single import activity and exceeding five concurrent import activities.

Pod Size

Significant changes to your usage patterns such as adding many new users or the execution of high volume data imports may change your pod sizing assessment. Ensure that your environment is properly sized to handle the import data volumes generated by your organization along with other operations that are performed by your users. Before starting a high volume import process or one time data load, you may want to have Oracle review your sizing. Contact Oracle help desk to start this review process.

Potential Issues When Opening CSV Files in Excel

Whenever you open the import source file or the exported source file in Excel, you might face issues with some of the field values. This topic explains the various issues that might occur and how to fix them.

Potential Issues

Potential issues that might occur include:

- Saving ID fields:

  Issue: If you save your CSV file and then reopen it in Excel, IDs and other large numbers are typically displayed in scientific notation: the product of a decimal number and a power of 10. For example, the value 123456789012 is displayed as 1.23457E+11.

  Cause: By default, Excel displays numbers that are greater than 11 characters in scientific notation.

  Workaround:

  a. Highlight the column containing the value.
  b. Right-click and select **Format Cells**.
  c. In the Format Cells dialog box, select the Category Number and set the decimal places to 0. Click **OK**.

- Saving date-related fields:

  Issue: If you save your CSV file and then reopen it in Excel, date-related fields such as PeriodName are typically displayed in yy-mmm format. For example, the value 12-16 is displayed as 16-Dec.

  Cause: By default, Excel displays date-related numbers in yy-mmm format.

  Workaround:

  a. Highlight the column containing the value.
  b. Right-click and select **Format Cells**.
  c. In the Format Cells dialog box, select the Category **Custom** and enter the type mm-yy or any other date format of your choice. Click **OK**.

- Saving numeric values that have more than 15 digits:

  Issue: If your CSV file has a value with more than 15 digits, such as 1234567890123456, then Excel displays it as 1234567890123450 when the file is opened. Excel replaces the digits beyond 15 with zeroes.

  Cause: Excel supports only 15 digits of precision.

  Workaround:

  Method 1

  a. Highlight the column containing the value.
  b. Right-click and select **Format Cells**.
  c. In the Format Cells dialog box, select the Category **Text** and click **OK**.
  d. Enter the value again in the cell.

  Method 2

  a. Highlight the cell containing the value.
  b. On the Formula Bar, precede the value with an apostrophe. For example, type the value '1234567890123456 and press enter.

Best Practices for Round-Trip Export and Import

You export data and then import it into CX Sales and Fusion Service environment forming round-trip operation. You can perform round-trip operations within an CX Sales and Fusion Service environment or between two different CX Sales and Fusion Service environments.

Before performing a round-trip operation, you must consider the identifiers and configurations. Although you can import most data directly into a target environment, you must ensure that the configurations from your source environment have been replicated in the target environment. Additionally, system-generated identifiers can't be imported and must be excluded from either the export or the import during round trip.

Use of Identifier Values

When importing records during a round-trip operation, you must ensure that the record to which you're associating (for example, if you're importing a Contact and want to assign an Owner value) already exists in the target application. You can't provide an identifier for a record that hasn't already been imported. If you attempt to associate with a record which can't be uniquely identified by the user-key provided, an error is displayed.

CX Sales and Fusion Service uses these two types of identifiers:

- Record IDs, which contain system-generated values.
- Alternate keys, whose values are set by the user.

Record IDs

Record ID values are generated by the application when you create a record. During round trip, the target application assigns record ID values to all the imported records; you can't set these using a value contained in the input data file.

When performing a round-trip operation, you have two options:

- You can exclude the record ID value during export.
- You can ignore the ID value during import mapping.

Record ID values are generally named using the convention "Record Type ID". For example, Account ID, Opportunity ID, or Contact ID.

Alternate Keys

When importing data during a round-trip operation, you must use alternate key values to identify associations between records. The alternate key values that are available for a record in the source system can be included in the data file as they're set by the user and can be assigned the same value as the source system. The set of alternate key values that are available vary by object, but generally include one or more of the following:

- Original System and Original System Reference
- Record Number (for example Account Number, Opportunity Number)
- Record Name (Custom Objects if field is marked as unique)
- Email

Round-Trip Export and Import of Extensible Object and Attributes

If the object you have exported is a custom object or a standard object with custom attributes, then you must ensure that the object definition is identical between environments. This means that the custom object and attributes must exist in the target application and must use the same object and attribute names. During data import, if a difference in the object or attribute definition prevents the import of a record, then an error is generated and reported in the import logs. For example, if the length or data type of a field differs between the source and target applications, the data import operation may not complete.