Oracle Fusion Cloud Customer Experience

Using Customer Data Management (CDM)

Oracle Fusion Cloud Customer Experience
Using Customer Data Management (CDM)

F77893-11

Author: Crescentia David

Contents

ORACLE

10 Manage Hierarchy Information   139

11 Information Protection   145

12 View Audit Histories   147

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons ⑦ to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

ORACLE

1 About This Guide

Audience and Scope

This guide is intended for the end users of the customer data management functionality such as customer data stewards and data steward managers.

It contains conceptual information and procedures needed to manage customer information and customer data quality. You can use this guide to work with the customer data management capabilities such as duplicate identification, duplicate resolution, address verification, and data enrichment.

Related Guides

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

Title	Description
Getting Started with Your Customer Data Management Implementation	Describes how to get started with the implementation of Oracle CX Customer Data Management capabilities, such as managing customer information, identifying and resolving duplicates, verifying addresses, and enriching data.
Using Customer Data Management	Describes how to manage customer information and identify and resolve duplicates, verify addresses, and enrich data.
Implementing Customer Data Management	Describes tasks to configure and set up Oracle CX Customer Data Management capabilities, such as, duplicate identification, duplicate resolution, address verification, and data enrichment.
Using Account and Contact Enrichment by Dun & Bradstreet	Describes how to use Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) to update company and contact data in your Oracle Cloud application.
Using Oracle Address, Email, and Phone Verification	Describes how to use Oracle Address, Email, and Phone Verification to verify and standardize addresses, emails, and phone numbers in your Oracle Cloud application.

2 Manage Customer Information

Overview of Customer Data Management

You can use Oracle Customer Data Management Cloud to clean, consolidate, and enrich customer information, and to create a trusted master customer profile.

Customer data management comes with these capabilities and components:

- Work areas to manage customer information
- Data quality configurations
- Data quality management capability during import process
- Separate work areas for duplicate identification, duplicate resolution, and address cleansing
- Work area for hierarchy management
- Data enrichment capability

Customer Information Management

You can manage customer information, such as profile, usage assignments, relationships, classifications, source system references, hierarchy memberships, linked records, accounts, and contacts, in the Organizations, Persons, and Groups work areas. You can also use these work areas to create customers.

Data Quality Configurations

You use data quality configurations to define how data quality services, such as data quality matching and cleansing, run during real-time and during batch execution. Data quality services use these configurations to call appropriate services of the embedded data quality engine to consolidate, cleanse, and enrich customer data.

Data Quality Management During Data Import

You can configure the import process to:

- Define deduplication within the data being loaded.
- Define deduplication of the data being loaded against the records that exist in the registry.

You can also select a matching configuration to identify duplicates and specify the action to perform on the duplicate records during the import process.

Duplicate Identification, Duplicate Resolution, and Address Cleansing

Duplicate identification lets you identify potential duplicates during data entry, data integration, or among records already in the application.

Duplicate resolution lets you resolve duplicates either by directly merging them or by creating duplicate resolution request such as merge or link. The resolution request can be verified, approved or rejected, and processed at a later date.

Address cleansing lets you cleanse address data existing in the registry and ensures data accuracy over time. Real-time address cleansing ensures that the incoming data from source systems follows the same convention as the target system for consistent information.

Hierarchy Management

You can make use of the hierarchy of your customers in many business processes. For example, you can use the hierarchy management capability to capture your customer's corporate hierarchy and to show how headquarters, branches, subsidiaries, and so on are related. You can use the corporate hierarchy information to process payments from one customer and apply them to another customer in the same hierarchy.

Data Enrichment

You can use data enrichment to make account and contact data more comprehensive. Data enrichment improves the quality of your existing account or contact data and address information as well as enriches that data with additional information.

Manage Organization Information

You can use the Organization entity to manage information for different types of institutional customers, such as business organizations and professional bodies.

An Organization exists separately from any business relationship that it enters into with another entity. For example, the same Organization can enter into different business relationships, such as buying or selling, and can be referred to differently, such as a customer or supplier, in different business flows across the application. In some Oracle Cloud applications, organizations are referred to as accounts.

You can use the Organizations work area, to search for an organization, retrieve organization data from various systems, review the data, and edit the data. The Organizations work area also provides you separate tabs to manage different types of organization information such as profile, usage assignments, relationships, classifications, source system references, hierarchy memberships, and linked records.

Create Organizations

To create organizations:

1. Navigate to the **Organizations** work area as follows: **Navigator**>**Customer Data Management**>**Organizations**.
2. Click the **Create** action menu option or button.
3. Complete the mandatory fields. Enter the following sample data:

   ○ Usage: Party of Interest.

   ○ Name: Green Corp.

   ○ Registry ID: This is auto populated. However, you can override it with a unique identifier of your choice.

   > **Note:** You can create organizations with pre-defined or customer defined party usages. These party usages must be created with the Unconditional Assignment as Yes.

4. Click **Save and Close** or **Save and Edit**, as required.

Search Organizations Using Saved Searches

You can use several saved searches to find the organization you want to work with. Let's say you want to find all organizations associated with a particular address, you can use the Search Organization saved search as follows:

1. Navigate to the **Organizations** work area as follows: **Navigator**>**Customer Data Management**>**Organization**.
2. Select Search Organizations from **Saved Search**.
3. Expand Search.
4. Click **Add Fields** and select any option prefixed with Address -. For example, Address- Address Line 1.
5. Enter the search phrase.
6. Provide value for one of the required fields such as Name or Registry ID.
7. Click **Search**.

You can see a list of organizations associated with the particular search phrase.

Edit Organizations

To edit organizations:

1. Navigate to the **Organizations** work area as follows: **Navigator**>**Customer Data Management**>**Organizations**.
2. Search for the organization that you want to edit. You can search by entering criteria such as the organization name or registry ID. You can also use the saved searches.
3. Select the organization you want to edit from the Search Results region and click through its name or registry ID to navigate to the **Edit Organization** page.
4. On the **Edit Organizations** page, you can edit the organization's details such as usage assignments, relationships, source system references, classifications, and linked records.
5. Click **Save and Close**.

Manage Person Information

You can use the Person entity to manage information for different types of individual customers and business contacts.

A Person exists separately from any business relationship that it enters into with another entity. For example, the same Person can enter into different business relationships, such as buying or selling, and can be referred to differently, such as a customer or supplier, in different business flows across the application. In some Oracle Cloud applications, person customers are referred to as contacts.

You can use the Persons work area, to search for a person, retrieve person data from various systems, review the data, and edit the data. The Persons work area also provides you separate tabs to manage different types of person information such as profile, usage assignments, relationships, classifications, source system references, hierarchy memberships, and linked records.

Create Persons

To create persons:

1. Navigate to the **Persons** work area as follows: **Navigator** >**Customer Data Management** >**Persons**.
2. Click the **Create** action menu option or button.
3. Complete the mandatory fields. Enter the following sample data:

ORACLE

- o Usage: Contact

- o Fist Name: Andrew

- o Last name: Flintoff

4. Click **Save and Close** or **Save and Edit**, as required.

Search Persons Using Saved Searches

You can use several saved searches to find the person you want to work with. Let's say you want to find all persons associated with a particular address, you can use the Search Persons saved search as follows:

1. Navigate to the **Persons** work area as follows: **Navigator>Customer Data Management>Persons**.
2. Select Search Persons from **Saved Search**.
3. Expand Search.
4. Click **Add Fields** and select any option prefixed with Address -. For example, Address- Address Line 1.
5. Enter the search phrase.
6. Provide value for one of the required fields such as Name or Registry ID.
7. Click **Search**.

You can see a list of persons associated with the particular search phrase.

Edit Persons

To edit persons:

1. Navigate to the **Persons** work area as follows: **Navigator** >**Customer Data Management>Persons**.
2. Search for the persons that you want to edit. You can search by entering criteria such as the person name or registry ID. You can also use the saved searches.
3. Select the person you want to edit from the Search Results region and click through its name or registry ID to navigate to the **Edit Person** page.
4. On the **Edit Person** page, you can edit the person's details such as usage assignments, relationships, source system references, classifications, and linked records.
5. Click **Save and Close**.

How do I manage group information in Customer Data Management

You can use the Group entity to create a customer record consisting of a collection of persons and organizations, and have a business relationship with other entities. You can assign a group to opportunities and leads.

A group includes basic information such as name, type, and certification level, and child entities such as group members, relationships, classifications, and contact methods. The group type such as Couple, Household, or Joint Ownership classifies a group based on its purpose. The Groups work area provides you separate tabs to manage different types of group information, such as profile, usage assignments, relationships, source system references, and linked parties.

ORACLE

Group Members

A group member can be a person or an organization, and their member type attribute defines the relationship of the member with the group. For example, a member of type Group Contact is the contact for the group. You can manage members of a group from the Profile tab of the Group work area.

Create Groups

To create groups:

1. Navigate to the **Groups** work area as follows: **Navigator** > **Customer Data Management** > **Groups**.
2. Click the **Create** action menu option or button.
3. Complete the mandatory fields. Enter the following sample data:
   - Name: John and Family
   - Usage: Party of Interest
   - Type: Household
4. Click **Save and Close** or **Save and Edit**, as required.

Edit Groups

To edit groups:

1. Navigate to the **Groups** work area as follows: **Navigator** > **Customer Data Management** > **Groups**.
2. Search for the group that you want to edit. You can search by entering criteria such as the group name, registry ID, and type. You can also use the saved searches.
3. Select the group you want to edit from the Search Results region and click through its identifier to navigate to the **Edit Group** page.
4. On the **Edit Group** page, you can add new group members as well as edit group details such as usage assignments, relationships, source system references, classifications, and linked records.
5. Click **Save and Close**.

How You Manage Profile Information

The profile for any customer entity, such as Group, Person, or Organization, includes information such as customer details, additional names, additional identifiers, addresses, and contact points.

You can add most of the customer profile information during record creation, except for some profile attributes, such as an organization's financial and bank details. You can edit these profile attributes for an entity from the Edit page for that entity, such as, Edit Group, Edit Person, or Edit Organization. The Edit page for an entity lets you set a primary contact point or address for that entity.

One way to quickly view the history of changes made to a customer profile is to navigate to the Profile History page.

Some of the profile attributes, such as certification and primary contact details are common for all entity types and usages. However, some other profile attributes are specific to a customer type. They are as follows:

- Organization: Includes name, organization information, certification information, legal information, and contact details.

ORACLE

- Person: Includes person details such as name, address, and contact information.

- Group: Includes name, group information, and group members.

Related Topics
- Troubleshoot and Handle Errors

Track Profile History

Profiles and profile attributes of customer entities, such as Groups, Persons, or Organizations, can change over time because of duplicate identification and resolution activities aimed at consolidating data from several different source systems.

The Profile History tab provides you with a history of the changes to the profile of a customer entity.

How You Enable Profile History Tracking

You must set the profile option: ZCH_ENABLE_SURVIVORSHIP to Yes to enable profile history tracking.

View Profile History Information

To view the profile history information for a customer entity, navigate to the specific entity record as follows:

1. Sign in as a Customer Data Management user, such as Data Steward or Data Steward Manager.
2. Navigate to the relevant work area, such as Groups, Persons or Organizations as follows: **Navigator** > **Customer Data Management**.
3. Search for the record. You can search by entering criteria such as the name, registry ID, and type. You can also use the saved searches.
4. Select the record from the Search Results region and click through its name or identifier to navigate to the relevant **Edit** page. The Edit Organization (account), Edit Person (contact), or Edit Group (Household) page appears.
5. Click the **Profile History** tab.

On the **Profile History** tab, you can use the **From Date** and **To Date** filters to view the profile history in that date range.

A quick way to determine the most recent record when multiple changes are done within a day, is to use the sequence of changes on a given date along with the effective dates. The profile history information also includes changed attributes such as name, legal status, and size.

Change Details

The Change Details section includes multiple changes done within a day and also indicate the record that's available to be used in transactions. The old and new values of different attributes, such as name, legal status, and size, are also displayed.

You can export both the profile history information and the change details to spreadsheets.

Attribute Details

The Attribute Details section contains the details of the attributes that were updated during the Last Updated Date row that was selected in the Profile History section. The Changed Attribute and Rejected Attributes columns of the Profile

ORACLE

History section display the attributes that were changed or rejected during a particular update. The Survivorship Result column in the Change Details section display the result of survivorship rules that were applied for the update selected in the Profile History section.

How You Manage Usage Assignments

You can use Usage Assignments to define how entities are used across the application and in different business flows. Entities can have multiple usage assignments, such as Partner or Customer.

You can manage usage assignments for an entity from the Edit page of the selected entity, such as Edit Group, Edit Person, or Edit Organization. You can navigate to this page by searching for the required record from the Groups, Persons, or Organizations work area.

There are two types of usage assignments:

- Conditional usage assignments
- Unconditional usage assignments

Conditional Usage Assignments

A conditional usage assignment requires a business event to occur. For example, adding a person as a contact for a group creates contact usage for the person.

You can assign rules to a conditional usage assignment to define the business event. There are four types of rules:

- Assignment rules: Define how the usage can and can't be assigned.
- Exclusivity rules: Restrict usage assignment, so that between a specified date range the usage can be the only usage allowed to be assigned.
- Incompatibility rules: Specify which usages can't be assigned concurrently during a date range.
- Transition rules: Define which usages can transition to the usage you're creating or editing.

Unconditional Usage Assignments

You can update unconditional usage assignments without the need for a business event. For example, you can update the usage for an organization from a party of interest to a customer.

How You Manage Activities

You can review, create, and edit activities for your organization, a person, or a group. These activities can be appointments or tasks. You can also record your communication, such as calls, with any resource or contact.

ORACLE

Manage Appointments

You can use this procedure to manage your appointments with a contact or resource such as a customer or partner. This activity can help you prioritize your appointments. You can also provide additional notes for a meeting, if required.

1. Sign in as a Customer Data Management user, such as Data Steward or Data Steward Manager.
2. Navigate to the relevant work area, such as Groups, Persons or Organizations as follows: **Navigator** > **Customer Data Management**.
3. Search for the record for which you want to manage appointments. You can search by entering criteria such as the name, registry ID, and type. You can also use the saved searches.
4. Select the record from the Search Results region and click through its name or identifier to navigate to the relevant Edit page. The Edit Organization (account), Edit Person (contact), or Edit Group (Household) page appears.
5. Click the Activities tab.
6. Click **Actions** > **Create Appointment** to create an appointment. To edit an appointment, search for the appointment and click **Actions** > **Edit**. To delete an appointment, search for the appointment and click **Actions** > **Delete**. Confirm to delete.
7. Specify or change the details of the appointment such as subject, timings, contact with whom the appointment is set, and so on. You can set the recurrence of the appointment. You can also create or edit notes for the appointment. For more information about notes, see How You Manage Notes section in this chapter.
8. Click Save and Close. The appointment is displayed in the list.

Manage Tasks

You can use this procedure to manage tasks, provide a due date, and specify the owner, status, and priority for the task. You can also provide additional notes, if required.

1. Sign in as a Customer Data Management user, such as Data Steward or Data Steward Manager.
2. Navigate to the relevant work area, such as Groups, Persons or Organizations as follows: **Navigator** > **Customer Data Management**.
3. Search for the record for which you want to manage tasks. You can search by entering criteria such as the name, registry ID, and type. You can also use the saved searches.
4. Select the record from the Search Results region and click through its name or identifier to navigate to the relevant Edit page. The Edit Organization (account), Edit Person (contact), or Edit Group (Household) page appears.
5. Click the Activities tab.
6. Click **Actions** > **Create Task** to create a task. To edit a task, search for the task and click **Actions** > **Edit**. To delete a task, search for the task and click **Actions** > **Delete**. Confirm to delete.
7. Specify or change the details of the task such as subject, due date, contact with whom the task is to be done, and so on. You can set the priority of the task, percentage of task completion, and status of the task. You can also create or edit notes about the task. For more information about notes, see How You Manage Notes section in this chapter.
8. Click Save and Close. The task is displayed in the list.

Manage Logging Calls

You can use this procedure to record the details of calls or any communication that you had with a contact or resource. You can also specify the status and priority for the call.

1. Sign in as a Customer Data Management user, such as Data Steward or Data Steward Manager.
2. Navigate to the relevant work area, such as Groups, Persons or Organizations as follows: **Navigator** > **Customer Data Management**.

ORACLE

3. Search for the record for which you want to manage logging calls. You can search by entering criteria such as the name, registry ID, and type. You can also use the saved searches.

4. Select the record from the Search Results region and click through its name or identifier to navigate to the relevant Edit page. The Edit Organization (account), Edit Person (contact), or Edit Group (Household) page appears.

5. Click the **Activities** tab.

6. Click **Actions** > **Log a Call** to details of a call. To edit a call log, search for the note and click **Actions** > **Edit**. To delete a call log, search for the call log and click **Actions** > **Delete**. Confirm to delete.

7. Specify or change the details of the call log such as subject, due date, type of contact, the resource contacted, and so on. You can set the priority of the call log, percentage of task completion, and status of the call log. You can also create or edit notes about the call log. For more information about notes, see How You Manage Notes section in this chapter.

8. Click **Save and Close**. The call log is displayed in the list.

How You Manage Notes

You can manage use this procedure to miscellaneous information for an organization, person, or a group in the form of notes. You can create, edit, or delete notes.

Manage Notes

Perform the following steps:

1. Sign in as a Customer Data Management user, such as Data Steward or Data Steward Manager.

2. Navigate to the relevant work area, such as Groups, Persons or Organizations as follows: **Navigator** > **Customer Data Management**.

3. Search for the record for which you want to manage notes. You can search by entering criteria such as the name, registry ID, and type. You can also use the saved searches.

4. Select the record from the Search Results region and click through its name or identifier to navigate to the relevant Edit page. The Edit Organization (account), Edit Person (contact), or Edit Group (Household) page appears.

5. Click the **Notes** tab.

6. Click **Actions** > **Create** to create a note. To edit a note, search for the note and click **Actions** > **Edit**. To delete a note, search for the note and click **Actions** > **Delete**. Confirm to delete.

7. Specify or change the type of note and type or paste the contents of the note. You can also mark the note private.

8. Click Save and Close. The note is displayed in the list of notes table.

How You Manage Relationships

You can manage complex real-life relationships among various entities such as employees, employers, contacts, and organizations in the Edit page of the selected entity, such as, Edit Groups, Person or Organization.

You can navigate to this page by searching for the required record from the Groups, Persons or Organizations work area. In Oracle Applications Cloud, a relationship is an entity's role in the context of another entity.

> **Note:** You can only view the relationships for the entity in context, unless you have the manage privilege.

You must define the following for each relationship:

- Relation types, such as employment or subsidiaries.
- Relationship role pairs, such as employee and employer.
- Relationship phrase pairs, such as employee of and employer of

In the Edit page for an entity, you can:

- View all relationships for the entity in context.
- Create relationships for an entity by specifying the relationship role, the related party name, and the relationship start and end dates for each relationship.
- Modify the end date information and any additional information captured using descriptive flexfields for the relationships.
- Delete a relationship to make it inactive.

Source System References

A source system is any data source from which you can import entity records and other related data.

Source system references are the cross references between the source system unique identifier of a record and the unique identifier of that record in Oracle Applications Cloud.

Source System References in Oracle Applications Cloud

Companies may use multiple software applications to run their businesses. Often, these applications are supplied by different vendors and run on different databases, and that can cause these issues:

- Duplication of records and data across systems.
- Logical representation or structure of records may vary.
- Keeping the data in different systems synchronized, generating a consolidated view, and sharing data across systems becomes highly complex because of the difference in the logical representation.

You can resolve these issues in Oracle Applications Cloud by:

- Defining multiple external systems as source systems. While defining source systems you can specify the type of the source system. The source system can be a Spoke system, such as a legacy system, or a Purchased system, such as data from a third party provider. You can also specify which objects, such as parties only or parties and contacts, are importable from a particular source system.
- Creating records in Oracle Applications Cloud database from one or multiple source systems by:
  - Creating master records. Multiple source system references can create one master record by merging or linking multiple duplicate records imported from multiple source systems.
  - Creating records for every source system record. If you don't allow multiple source system references, then a record will be created for every source system record. This means that you could potentially create duplicate records in the database.

ORACLE

- Using source system references, also known as cross references, to present a consolidated view. You can maintain a central register of global identities, links to master data in source systems, lists of transformation rules, and a minor subset of information that's needed to aid in matching. At runtime, you can access the source systems' master data and assemble a point-in-time consolidated view.

How You Manage Source Systems

In Oracle Applications Cloud, you can:

- View source systems contributing to the party in the context from the Referenced Source Systems table.

- View source system identifiers information for the child entities of a party for the source selected from the Referenced Source Systems table.

- Delete source system identifiers to change the status of the source system reference to inactive.

- Add source system identifiers to include a new source system reference.

Note: The source system, source system reference identifier, and the start date can't be updated. To change a source system reference identifier, delete the current record and add a new source system reference.

ORACLE

ORACLE

3 Import Your Data

About Import Management

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. **Note:** When importing child records for a parent object, ensure that the child records and the parent records are imported in the same batch (using the same import file). If you import child records in batches using parallel jobs, then the import job may fail because the parent object record may be locked during the import process.

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.

ORACLE

Option	Description
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. **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:

ORACLE

Option	Description
	- 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
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.

ORACLE

    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 are retained until you click 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 in 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 in 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. To turn on all notifications, then select the **Enable Notifications** checkbox in the Notification Preferences heading.
5. Click the Save button.

ORACLE

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. To turn on a specific event notifications, click the template for the desired event.
6. On the **Template Information** page, select the **Enabled** checkbox 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 my data import options?
- What are the roles required to import or export 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

ORACLE

- 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:

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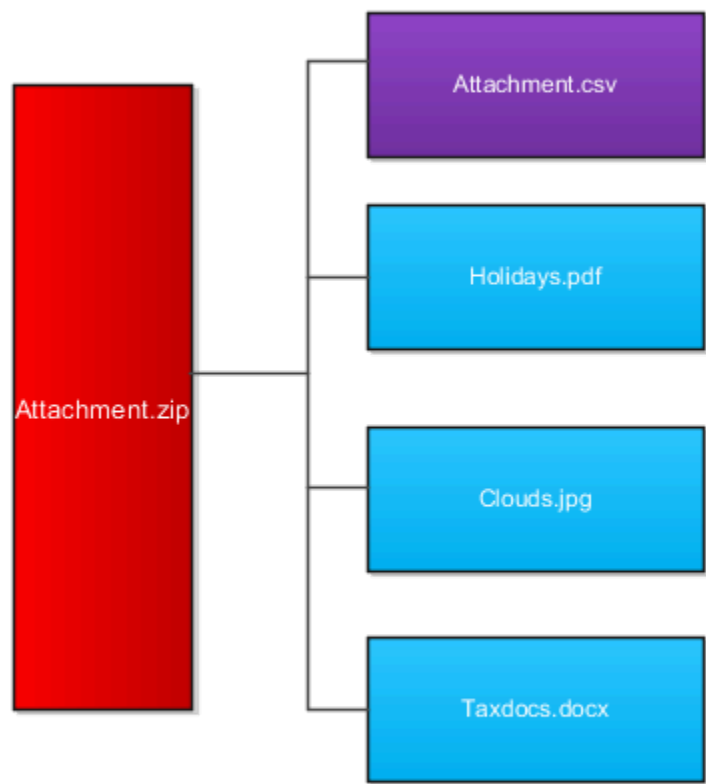
Here are the examples for the attachment.csv file shown in purple box in the image above:

Pk1Value	ObjectPuid	FileName	Url
100100004247330			http://www.yahoo.com
100100004247330		Clouds.jpg	
100100004247330		Taxdocs.docx	
	CDRM_6493		http://www.google.com

ORACLE

Pk1Value	ObjectPuid	FileName	Url
	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.

ORACLE

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?

How You Enable Survivorship During Import

Survivorship on update is available for the following four Import Management objects:

- Account
- Organization
- Contact
- Person

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file. This CSV file depends upon the object you want to import. Before you start importing, check that the CSV file contains the SourceSystem value. For more information, see Import Your Account Data, Import Your Contact Data, Import Your Person Data, and Import Your Organization Data topics in this guide.

Enable Survivorship

After you have the CSV file ready, create an import activity to import the account information and enable survivorship as follows:

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 either Account, Organization, Contact, or Person from the **Object** drop-down list.
4. Click to expand **Advanced Options** section.
5. Select **Enable survivorship logic**.

   Note: This option is available only if the selected import object is Account, Organization, Contact, or Person and attribute survivorship has been already configured. High-Volume import mode is supported, if the survivorship configuration only uses Source Confidence. If Data Quality Rules are enabled, High-Volume mode import isn't available.

   You can continue to import and review the import results.

You can then import data. For more information on how to import data, see Import Data topic in Related Topics section.

Related Topics
- How do I import account data?
- How do I import contact data?
- How do I import person data?
- How do I import organization data?

ORACLE

Import 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

ORACLE

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. To view source systems, use the Manage Trading Community Source System task.	Conditionally Required To identify an account record, use one of these:	Conditionally Required To identify an account record, use one of these:	Conditionally Required To identify an account record, use one of these:

ORACLE

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Account Record	Updating an Existing Account Record	Deleting an Existing Account Record
			• SourceSystem and SourceSystemRefe • PartyNumber	• SourceSystem and SourceSystemRefe • PartyNumber	• SourceSystem and SourceSystemReferenceValu • PartyNumber
SourceSystemReference	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.

ORACLE

> **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

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.

ORACLE

- 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:

ORACLE

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
`SourceSystemRefe`	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.

ORACLE

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

ORACLE

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	To define a country, you must specify the LevelNumber as 1.	Yes

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Country Structure Record
	geography types for your country. The values can be 1, 2, 3, and so on.		

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.

ORACLE

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

ORACLE

CountryCode	LevelNumber	GeographyType
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
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.

ORACLE

Attribute Name	Value	Description
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, 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**.

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 *Can you provide an 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

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Geography Record
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 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.	None	Required

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 using 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.

ORACLE

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

- Import Your Country Structure Data
- How do I import data?
- Potential Issues When Opening CSV Files in Excel
- Example of Importing Country Structure Data
- Can you provide an example of importing geography data?

Can you provide an example of importing geography data?

This example demonstrates how to import third party geography reference 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.

ORACLE

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	ParentSOurce	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			

ORACLE

RecordType	PrimaryGeogr	CountryCode	LevelNumber	SourceId	ParentSOurcel	IdentifierType	IdentifierSubT	IdentifierValue
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.

ORACLE

Attribute Name	Value	Description
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.
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**.

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.

ORACLE

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
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.

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

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.

ORACLE

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 Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System	Optional	Required

ORACLE

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Household Record	Updating an Existing Household Record
				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
- How do I import data?
- Potential Issues When Opening CSV Files in Excel

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 for the combination of ExistingSourceSystem and ExistingSourceSystemRefere	Not required
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

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Hub Source System Reference Record	Updating an Existing Hub Source System Reference Record
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 from the table HZ_ORIG_SYS_REFERENCES.	Not required	Conditionally required. Provide one of the following: • SourceSystemReferenceId • A combination of SourceSystem, SourceSystemReference and OwnerEntityObject

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Hub Source System Reference Record	Updating an Existing Hub Source System Reference Record
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
- 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 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.

ORACLE

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 SourceSystemReference • 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 • PartyNumber	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber
PartyNumber	The public unique identifier of the party.	Know party number.	Conditionally Required	Conditionally Required

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
		To obtain a list of all party IDs and party numbers, export the Party object.		
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 location is a branch, in some countries the "DUNS" number of the headquarters is used to run the query. Otherwise,	No validation	Optional	Optional

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
	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**.

ORACLE

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
- 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:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
				• 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: • 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

ORACLE

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
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 SourceSystemReference • 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 Community Source System task.	Conditionally required To identify a person record, use one of these: • Combination of SourceSystem and SourceSystemReference • PartyNumber	Conditionally required To identify a person record, use one of these: • 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.

ORACLE

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?

ORACLE

4 Export Your Data

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

ORACLE

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
- Export Data
- How You Monitor Export Activity

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 *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.

ORACLE

Field	Description of the value
	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.
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.

   o 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	Comma

ORACLE

Option	Description	Default Value
	- Question Mark - Semi-Colon - Star Symbol - Tilde Symbol	
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: - EU-YYYY/MM/DD - ISO 8601 - YYYY-MM-DD - UK/Canada - DD/MM/YYYY - US - MM/DD/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

ORACLE

Option	Description	Default Value
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
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	N/A

ORACLE

Option	Description	Default Value
	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.	

- ○ 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?

Export Queues

This topic describes the different infotiles displayed on the Manage Exports page of the Export Queue tab.

ORACLE

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.
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

ORACLE

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
- Business Plan Goals
- Business Plan Initiatives
- 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*

ORACLE

- Geography Zones
- Goals
- Household
- HRHelpDeskRequest
- Hub Source System Reference
- Inbound Message
- Incentive Compensation Performance Measure
- Incentive Participant
- Incentive Participant Goal
- Incentive Participant Role Assignments
- Interaction
- Interaction Data
- Interaction Participant
- KPI
- Linked Party
- MDF Budget
- MDF Claim
- MDF Request
- Nonduplicate
- Note
- Objective
- Opportunity
- Organization
- Partner
- Partner Programs
- Partner Rollups
- 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

ORACLE

- 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.

ORACLE

Column	Description
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.

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.

ORACLE

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

-

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.
-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
- Export Data
- Overview of External Data Loader Client
- Command-Line Parameters

ORACLE

ORACLE

5 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
- Export Data
- How do I import data?

ORACLE

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
- Export Data
- How do I import data?

ORACLE

6 Enrich Data

Overview of Data Enrichment

You can use Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) to enrich your sales account and contact data. Oracle Account and Contact Enrichment by Dun and Bradstreet (D&B) has the most up-to-date data for over 300 million companies and over 100 million contacts worldwide.

Data enrichment improves the quality of your existing sales account and contact data, and it also enriches the data with additional information. Sales Representative can enrich sales accounts and contacts in real-time in Sales, and data stewards can enrich data in bulk in CDM, using either batch data enrichment in the Data Enrichment work area or manually using bulk import and export. Additionally, you can download new account and contact data from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).

Batch Data Enrichment

The batch data enrichment option lets you enrich data in bulk by creating and submitting batch-processing jobs in the Data Enrichment work area. This enrichment process flow comprises the following steps:

1. Create a Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) user and assign appropriate privileges
2. Configure CX Sales and Fusion Service to Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) integration
3. Create and submit batch-processing jobs
4. Monitor batch status and take appropriate follow-up action

You can do the following two batch data enrichment types:

- **Enrich Existing Records**: Use this option to submit the existing records in the application for a bulk data enrichment.

- **Synchronize D&B Updates**: Use this option to synchronize your D&B updates, including your previously enriched sales organization and person records as well as new records imported from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), to uptake the latest updated information from D&B.

Manual Data Enrichment

CX Sales and Fusion Service comes with preconfigured mappings of data attributes to import sales account and contact data from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B). If you require additional attributes not in these mappings, you must create a custom mapping and manually import the data using that mapping.

1. Export data to a CSV file.
2. Enrich the data using Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).
3. Download the enriched data file from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).
4. Import the enriched data file into the application.

Here's a figure to show the available data enrichment process flows.

It illustrates the process flows for Customer Data Management.
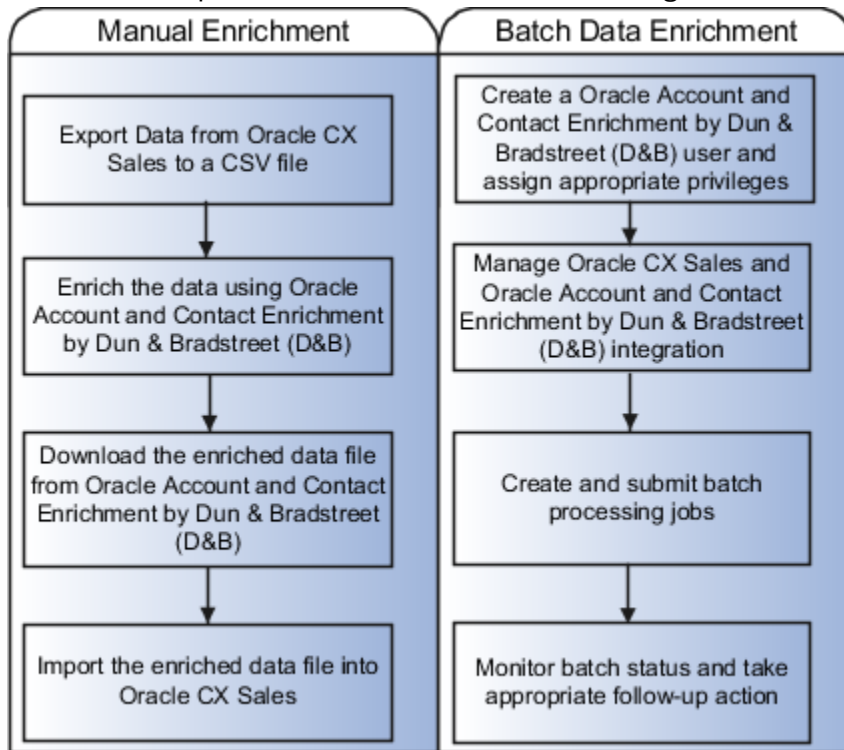
Batch Data Enrichment

Batch Data Enrichment Using Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)

You can use the batch data enrichment functionality to enrich your sales account and contact (Fusion Service contact) data in bulk with additional information using D&B data.

You must complete the following prerequisites before you can enrich data in bulk:

1. Purchase a subscription to Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).
2. The service administrator must create a new user with the Data Service Client API AppID role. This user is used by the application to securely communicate with the REST API for Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).
3. The service administrator must set up CX Sales and Fusion Service and Data Cloud integration.

Types of Batch Data Enrichment

You can do the following two batch data enrichment types:

- **Enrich Existing Records**: Use this option to submit the existing records in the application for a bulk data enrichment.

ORACLE

- **Synchronize D&B Updates**: Use this option to synchronize your D&B updates, including your previously enriched Sales Organization and person records as well as new records imported from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), to uptake the latest updated information from D&B.

How You Enrich Existing Data

You can enrich both organization (sales account) and person (contact) records by creating and submitting batch-processing jobs in the Data Enrichment work area. These batches, in the background, export the records to Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B). The exported records are enriched in Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) by the REST API. Finally, the enriched records are imported back. You can review the status of the scheduled and processed batches on the Data Enrichment work area.

> **Note:** Before enriching contacts using the batch data enrichment process, you must enrich the associated sales accounts.

Data Enrichment Processing Options

To enrich your existing records, you can select one of the following two processing options:

- **Review Batch**: Select this processing option to review the results of data enrichment in the matched candidate records in the batch before importing the enriched data. Note that the review batch option shows only the first 100 records from the data enrichment batch.
- **Process Batch mode**: Select this processing option to submit the data enrichment batch for processing without a review.

How You Synchronize D&B Updates

You can periodically synchronize your D&B updates, including your previously enriched Sales organization and person records as well as new records imported from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), to uptake the latest updated information from D&B. You can synchronize these records from the Data Enrichment work area, using the Synchronize D&B Updates Oracle Enterprise Scheduler Service job. For more information, see: Synchronizing Previously Enriched Data: Procedure.

Data Enrichment Results

You can search for the status of scheduled and processed batches on the Data Enrichment work area. The batch ID contains the link to the Batch Details page. You can download the details of the processed records by clicking on the linked number on the Batch Details table. Batches submitted with the Review Batch processing option appear on the Data Enrichment work area in the status Review when completed. After reviewing the results of data enrichment in the matched candidate records in the batch, you must click Import to uptake the enriched data.

Create a Data Enrichment Batch

Use this procedure to create a data enrichment batch to enrich existing customer data in bulk with additional information using D&B data. Before you proceed with batch data enrichment, verify that the data enrichment configurations are complete including any custom import mappings.

For more information, see the Overview of Configuring Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for Data Enrichment topic in the Related Topics section.

ORACLE

To create a data enrichment batch:

1. Navigate to the **Data Enrichment** work area as follows: **Navigator** > **Customer Data Management** > **Data Enrichment**
2. Click the **Create** action menu option or button to run the data enrichment batch definition process train.
3. Enter the following basic information in the **Create Data Enrichment Batch** page. Enter the following sample data:

   ○ **Batch Name**: Data_Enrichment_Batch_1

   ○ **Confidence Score**: You can leave it at default 90 or specify a new score.

   ○ **Party Type**: Select Organization to enrich a sales account record or Person to enrich a contact record.

   ○ **Processing Option**:

     - Review Batch: Select this processing option to review the results of data enrichment in the matched candidate records in the batch before importing the enriched data. Note that the review batch option shows only the first 100 records from the data enrichment batch.
     - Process Batch: Select this option if you want to submit your data enrichment batch for processing without a review. This is the default batch data enrichment option.
4. Click **Next**
5. Enter the record selection criteria on the **Enrich Organizations: Selection Criteria** page.
6. Click **Preview** to verify that the selection criteria yielded records in the batch.
7. Review the batch and click **Next**. **Create Data Enrichment Batch: Review** page appears.
8. Click **Submit** to send the records for batch data enrichment.

You can search for the status of scheduled and processed batches on the Data Enrichment work area. The batch ID contains the link to the Batch Details page. You can download the details of the processed records by clicking on the linked number on the Batch Details table.

Batches submitted with the **Review Batch** processing option appear on the Data Enrichment work area in the status **Review** when completed. After reviewing the results of data enrichment in the matched candidate records in the batch, you must click Import to uptake the enriched data.

Related Topics
- Manual Data Enrichment
- Overview of Configuring Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for Data Enrichment

Synchronize D&B Updates

You can periodically synchronize your D&B updates, including your previously enriched organization (sales account) and person (contact) records as well as new records imported from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), to uptake the latest updated information from D&B.

You can synchronize these records from the Data Enrichment work area, using the Synchronize D&B Updates Oracle Enterprise Scheduler Service job. You can update or synchronize records only if they have a Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) ID assigned to them. In case some records were originally excluded from synchronization in the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) Administrator UI, these records can't be synchronized and updated.

Before you proceed with the synchronization process, verify that the data enrichment configurations are complete including any custom import mappings. For more information, see the Related Topics section.

> **Note:** Note that a synchronization job updates one million records at a time. If you have more than one million records to update, you must submit the synchronization batch a second time.

Perform the following steps to synchronize your D&B updates:

1. Navigate to the Data Enrichment work area.
2. Click **Actions**.
3. Select Synchronize Organizations or Synchronize Persons. The Schedule Updates for Person or Schedule Updates for Organization page appears.
4. Click **Advanced** to select batch run options such as As soon as possible or Using a schedule. By default, the batch run is scheduled for As soon as possible.

   In the Advanced Option section of the Schedule Updates for Persons or Schedule Updates for Organizations page, you can update the frequency in which you want the batch to run. You can also set a start and end date to the batch schedule.
5. Click **Submit**.
6. Click **OK** in response to the confirmation message.

You can search for the status of scheduled synchronization batches on the Data Enrichment work area. The batch ID contains the link to the Batch Details page. You can download the details of imported (synchronized) and not imported (not synchronized) records by clicking the linked number on the Batch Details table.

> **Note:** You can't see the list of records that were excluded from synchronization in the Imported or Not Imported record list.

Related Topics
- Overview of Configuring Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for Data Enrichment

Manual Data Enrichment

Manual Data Enrichment

You can manually enrich sales account and Fusion Service contact data using the Oracle Account and Contact Enrichment by Dun & Bradstreet service.

For detailed steps, see the topics About Matching Records and Enrich Data in CX Sales in the Using Account and Contact Enrichment by Dun & Bradstreet guide.

Related Topics
- Manual Data Enrichment

ORACLE

How You Import New Records from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)

You can import sales accounts or contacts from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) into your application instance.

To import data from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B):

1. Export the sales accounts or contacts from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).
2. Import the CSV file into the application.

Before importing Fusion Service contacts, you must ensure that the sales accounts related to the contacts you want to import exist in your application instance.

Export Accounts or Contacts from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)

You can either export a set of sales account or contact data or export all available sales accounts and account contacts from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B).

You can search for sales accounts and contacts you want to import from the Search window. After searching for the records you want to export, click **Export** . You must select **Use CRM Template** as the export template so that the exported file can be later imported into the application.

For more information, see Using Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) guide.

Import Accounts or Contacts

You can import the sales account or contact data exported from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) into CX Sales and Fusion Service using Import Management.

To import data using Import Management:

1. Navigate to **Tools** > **Import Management**
2. On the Manage Imports page, click the **Create Import Activity** button to create an import activity.
3. Enter the appropriate import details. While specifying the import object, select **Account** to import sales account data and **Contact** to import contact data.
4. Browse and select your source data file in CSV format.

   The application provides predefined mappings to import sales account or contact data from Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B). The application tries to automatically map each of the source file columns to the appropriate target object attribute. However, you must map the columns that aren't mapped. The data in unmapped columns isn't imported.
5. Click **Validate Data** to check the field mapping.
6. Submit the import process.
7. Verify the imported data.

Related Topics
- Enrich Data in CX Sales

ORACLE

7 Verify Data

Verify Customer Information

Considerations for Scheduling a Data Verification Process

You may find data verification processes to be time consuming, depending on the batch sizes.

Therefore, you must consider the following before scheduling a data verification process:

- Process Completion Time
- System resources
- Process dependencies

Process Completion Time

The time required to complete the data verification process depends on the number of records, cleansing complexity, and hardware characteristics. You must calculate the estimated completion time taking into account these three factors and the available benchmark.

System Resources

You must estimate system performance based on recent data, by reviewing the batch and environment statistics. You can also review various object lists to know the time when most system resources are available for the data verification process.

Process Dependencies

You must understand process dependencies before scheduling the data verification process. For example, you must consider whether other processes are waiting for the results of the data verification process.

Related Topics
- Best Practices for Accepting Data Verification Results
- Create Data Verification Batches

Considerations for Creating Data Verification Batches

You create a data verification batch to cleanse and validate data.

Consider the following before creating a data verification batch that best suits your address cleansing needs:

- Create new or use a copy of an existing data verification batch
- Create a data verification batch for a single or periodic run

ORACLE

Create New or Use a Copy of an Existing Data Verification Batch

You can quickly create a data verification batch by copying an existing verification batch. You can edit the batch details such as batch selection criteria, address cleansing mode, and scheduling before you submit the batch.

> **Note:** You can search for existing data verification batches using the Saved Searches.

You create a new data verification batch, instead of copying an existing verification batch, if your data verification batch details are unique.

Create a Data Verification Batch for a Single or Periodic Run

You can create a data verification batch for a single run or a periodic run. You can run data verification batches periodically for tasks that are mostly ongoing and repetitive, such as the execution of registry address cleansing or phone number verification.

You can schedule the batch to run at a specific time or at a specific interval. For example, you can schedule the batch to run daily, every night at 9 PM, weekly, or every Sunday at 10 PM.

Create Data Verification Batches

You can use data verification cleansing to verify addresses, phone numbers, and email addresses data that already exists in the registry.

This process updates and completes the addresses, phone numbers, email addresses in your database using the verified address from Oracle Address, Email, and Phone Verification. For example, it can add a missing postal code in an address.

You can create an data verification batch and specify selection criteria on the Create Data Verification Batch page. You specify selection criteria, also known as filter criteria, to narrow down the list of candidate records for data verification.

You can use this procedure to create a data verification batch and specify the selection criteria:

1. Navigate to the Create Address Cleansing Batch page as follows: **Navigator** > **Customer Data Management** > **Data Verification**.
2. Click Create from the Actions menu.
3. Enter a **Batch Name**.
4. Select an appropriate **batch mode**. Select Simulated mode to review and accept the verified data before committing the data verification job. Select Automated mode to verify the data and save it automatically.
5. Provide a batch description, if required.

ORACLE

6. Specify the following Cleansing Configuration Parameters to override the configuration that was specified using the Manage Address Cleansing Configurations task:

   ○ Minimum Verification Level: Used to specify the level of verification to which the input data matches the available reference data during the verification process.

   ○ Minimum Verification Score: Used to specify the similarity between the address entry and closest reference data match as a percentage between 0 (no match) and 100 (perfect match).

   ○ Default Country: Used to specify the country to cleanse the address, if no identifiable country can be found in an input address.

   ○ Output Casing: Used to specify the letter case for an output address. For example, the Output Casing is set to Mixed, this 411 THEODORE FREMD AVE # 300 RYE NY 10580 input address is displayed as 411 Theodore Fremd Ave # 300 Rye NY 10580.

   ○ Correct Partially Verified Addresses: Determines if you want to correct the addresses entry that are partially verified.

   ○ Correct Ambiguous Addresses: Determines if you want to correct the unclear addresses entry and resolve it to the correct address.

   ○ Return Verified Address in Native Script: Displays verified addresses in the native script of the country selected in the Default Country field. This is supported for a native (local) language to Latin (English) output or from Latin to a native output. Note that requests in a non-Latin language can't have a verified output in another non-Latin language. When this option Return Verified Address in Native Script is selected, addresses are cleansed in the native script of the input address when possible. When this option isn't selected, DaaS automatically decides whether the data has to be cleansed in the native script based on the input address.

   Note: The configuration settings that you set in the Manage Address Cleansing Configurations setup task are displayed as the default values on this page. The values that you specified on this page are applicable only to this address cleansing batch request. For more information about the configuration parameters, see the Address Cleaning Setup chapter of the Implementing Customer Data Management guide.

7. Click **Create** on the Action menu in the section Address Cleansing Batch: Selection Criteria.

8. Enter the **Selection Criteria**. We highly recommend that each time you submit a batch request, you ensure that the batch size and the number of results of the selection criteria do not exceed the data verification usage quota. Tightly knit the conditions in the selection criteria to narrow down the number of records that will be submitted for the data verification cleansing process.The following table contains sample selection criteria.

Object	Attribute	Operator	Value
Location	Country	Equal to	US
Location	State	Equal to	CA
Location	Creation Date	Before	7/18/19
Location	Creation Date	After	1/11/19
Phone	Phone Number	Contains	90

9. Click **Schedule** to specify process options. The Schedule Address Cleansing Batch page appears.

ORACLE

10. Click **Submit**.
11. Click **OK** to confirm the batch submission.

Related Topics

- Best Practices for Accepting Data Verification Results

Best Practices for Accepting Data Verification Results

You can accept or reject the results of a batch data verification process run in simulated mode.

You have the following options:

- Accept or reject results for the entire batch
- Accept or reject results by country
- Accept or reject results by record

> **Note:** All verified addresses displayed with Cleansed status are counted against the Oracle Address, Email, and Phone Verification quota irrespective of their accept or reject status.

> **Note:** If you submit a batch for verifying in the automated mode, then you can't accept or reject the process results. The verified data is automatically saved to the database. All verified data are counted as verified against the Oracle Address, Email, and Phone Verification quota.

Accept or Reject Results for the Entire Batch

Accept the results for the entire batch only if you're sure that the data verification results are accurate. Reject the results if you're not sure about the reliability or accuracy of the batch results, or if the process results may reduce the data quality.

Accept or Reject Results by Country

The data verification process results depend on the data quality, coverage, and the geography information of the country or region.

Consider the following before accepting or rejecting address cleansing process results by country:

- If the percentage of errors is high and the results for all countries aren't acceptable, then Accept results only for countries with acceptable cleansing results.
- Reject results for countries with very high percentage of errors.

Accept or Reject Results by Record

Accept or reject cleansing results of each individual record. You can click Exclude to exclude verified records from the current and subsequent data verification batches. You can also select more than one record at a time using the check boxes and then click Accept, Reject, or Exclude. Be cautious of using the select all check box on the table header because the changes apply to all the records. We recommend that you review all the records before you use the select all check box.

ORACLE

Interpret Data Verification Results

You can drill down the data verification batch results and click View Details to see the statistics of the data verification results. You can also see the visual representation of these statuses.

To view the results:

1. Navigate to the Create Address Cleansing Batch page as follows: **Navigator** > **Customer Data Management** > **Data Verification**.
2. Search for a batch and click its status.

Similarly, you can click the data verification results of each country to view the statistics and visual representation of the statuses of cleansed records by country.

Here are the statuses of verified records:

- Processed: Indicates the total number of records that were processed.

- Failed: Indicates the number of records that couldn't be processed. This can happen due to unexpected errors.

- Cleansed: Indicates the number of records that were verified. That is, the input data and a record from the available Loqate reference data were matched.

- Skipped: Indicates the number of records that weren't cleansed. A record is skipped when the record couldn't be verified to the minimum acceptable level specified during the cleansing configuration. The following data verification configuration criteria impact the number of skipped records:

  - Minimum Verification Score
  - Minimum Verification Level
  - Correct Partially Verified Addresses
  - Correct Ambiguous Addresses

  For example, the Minimum Verification Level was set to 5 and the input address belongs to United Arab Emirates. Loqate supports verification level of L4 for United Arab Emirates. This address record is skipped.

In batch cleansing, failed and skipped aren't counted against the quota usage. In real-time and while importing data, all records are counted regardless of the record's cleansing status.

Further, verified records can be in the following states:

- Accepted: The number of verified records accepted by the data steward.

- Rejected: The number of verified records rejected by the data steward.

- Error: The number of records that weren't updated in the application database.

ORACLE

FAQs for Data Verification

What's an Address Cleansing Batch?

You use an address cleansing batch to select and submit a set of records for address cleansing. Batch cleansing validates and cleanses address data in the registry. This resolves existing errors as well as updates the addresses with the changes in the geography reference data such as postal code.

Can I resubmit an address cleansing batch?

No. However, if you update or edit the addresses you can resubmit the modified addresses as a new batch.

What's the difference between Automated Cleansing mode and Simulated Cleansing mode?

Automated Cleansing mode doesn't require any user action. You use this mode to automatically save cleansed addresses to the database. All cleansed addresses are counted as cleansed by Oracle Address, Email, and Phone Verification.

Simulated Cleansing mode lets you review the addresses verified using Oracle Address, Email, and Phone Verification. You can accept or reject cleansed data in its entirety, by country, or by individual address. All cleansed addresses, irrespective of their accept or reject status, are counted as verified by Oracle Address, Email, and Phone Verification. For example, 100 addresses go through the batch verification and 60 addresses are returned as cleansed. These 60 addresses are counted in Oracle Address, Email, and Phone Verification irrespective of you accepting or rejecting them.

Related Topics
- Best Practices for Accepting Data Verification Results

Why did the batch cleansing process skip some records?

Batch cleansing skips a record if the record is already cleansed and validated. For example, an address that already follows the formats, norms, and standards of the related postal directory.

ORACLE

Why did some records fail the batch cleansing process?

Records can fail the batch cleansing process because of Oracle Address, Email, and Phone Verification connection or Oracle Address, Email, and Phone Verification configuration issues. Exceeding the address verification usage quota can also cause records to fail the batch cleansing process.

How can I view the Oracle Address, Email, and Phone Verification usage information?

You could be using Oracle Address, Email, and Phone Verification in various applications like Oracle Customer Data Management, Oracle CX Sales, Oracle Procurement Cloud, or even in your test environment. Oracle Address, Email, and Phone Verification doesn't distinguish between a production environment or a test environment. When you purchase Oracle Address, Email, and Phone Verification, you purchase one instance of Oracle Address, Email, and Phone Verification. This instance could be used initially for testing and later in the production environment. You can view the address record usage on the Oracle Address, Email, and Phone Verification home page. For more information about the usage dashboard, see the Related Topics section.

Related Topics
- About Address Verification

ORACLE

8 Identify Duplicates

Identify Duplicate Customer Information

How You Manage Duplicates

You can identify potential duplicates in your database by creating and running duplicate identification batches. These batches, when complete, contain sets of two or more potential duplicate records, which are identified by the application for your review.

You can analyze each of these duplicate sets and determine whether you want to resolve them by creating a merge or link resolution request.

While managing duplicate sets you can:

- Use the Test Merge duplicate resolution request type to test your merge configurations, such as survivorship rules and agreement rules, without any impact your application data.

- Resolve duplicates within each identified duplicate set through a merge or link request. A merge request combines duplicate records and a link request joins duplicate records. You can also create a generic request to select the resolution later.

- Remove records that you don't want to include in the duplicate resolution request. You can also restore the previously removed records back to the set from the removed records table.

- Mark a pair of records as nonduplicate, so that these records aren't identified as potential matches. You can remove the pair from the nonduplicate list by changing the end date.

- Change the master record.

- Submit the duplicate sets as merge or link requests for resolution.

Related Topics
- Create and Submit Resolution Requests in Duplicate Identification Work Area
- Create Duplicate Identification Batches and Define Subset Rules

Considerations for Creating Duplicate Identification Batches

You can create a duplicate identification batch using the following options:

- Create the duplicate identification batch from scratch for a single or periodic run.
- Create the duplicate identification batch from a copy of an existing duplicate identification batch.

You can choose between two of the following batch match modes while creating a duplicate identification batch:

- Within the batch: Runs the duplicate identification process within the batch.
- Against the registry: Runs the duplicate identification process against the registry.

ORACLE

Batch Creation for Single or Periodic Run

You can create duplicate identification batches for a single or periodic run. You are likely to run a batch periodically for an ongoing or a repetitive task, such as the execution of registry duplicate identification.

You can schedule the periodic batch to run at a specific time or at a specific interval. For example, you can schedule the batch to run daily, every night at 9 PM, weekly, or every Sunday at 10 PM.

Create New or Use a Copy of an Existing Duplicate Identification Batch

You can use a copy of an existing duplicate identification batch to quickly create a new one. . You can edit the batch details, such as subset rules or batch selection criteria rules, duplicate identification rules, and schedule of the batch process before you submit the batch.

But, if your duplicate identification requirements are unique, you should create a new batch instead of copying an existing one.

Identify Duplicates within the Batch

You can look for duplicates in a batch by using the **Within the Batch Match** mode. In this mode, the application includes records in a batch based on configured subset rule conditions or the batch selection criteria rules and checks for duplicates only among the records within that batch.

Identify Duplicates Against the Registry

You can identify duplicates across the database by using the **Against the Registry Batch Match** mode. In this mode, the records that meet the subset rule conditions are included in the duplicate identification batch. The application matches these records against one another as well as against other records in the database.

Add Additional Attributes to Define Subset Rules

You define subset rules as a part of creating a duplicate identification batch.

These rules, also known as batch selection criteria rules, retrieve a subset of records from the database in the duplicate identification batch for matching them against one another as well as against other records in the database. You can define these rules on the Create Duplicate Identification Batch page using the available objects, attributes, and operators, followed by an AND or OR condition.

In case the attributes available out of the box on this UI don't meet your business requirements you can add additional standard or custom account (organization) or contact (person) attributes.

To add new attributes to the batch selection criteria, you must add the required attributes to the lookup types `ZCH_MATCH_OBJ_PERSON` and `ZCH_MATCH_OBJ_ORGANIZATION`, as lookup codes. Before you update the lookup types, you must identify the display name and API (internal) name for each attribute that you want to add.

Identify Display Name and API Name for an Attribute

You must identify the display name and the API (internal) name of the attributes that you want to add as subset rule selection criteria.

You can find the list of standard attributes for accounts and contacts, along with their lookup code, display name (meaning), and API name (tag), from the topic "List of Additional Attributes for Subset Rule ". Use the following steps to

ORACLE

identify the display name and the API name of the custom attributes of an account (organization) or contact (person) using Application Composer.

> **Note:** You can view and update objects in Application Composer only if you're in an active sandbox.

1. Sign in as a setup user, such as Master Data Management Application Administrator, and navigate to **Application Composer**.
2. Expand the **Standard** Objects list and navigate to Account or Contact.
3. Click **Fields** under Account or Contact. The Fields page appears.
4. Select the Custom tab to see the list of available attributes.
5. Click the **Display Label** link that you want to add. The Edit Custom Field page appears.
6. Copy the Display Name and the API Name.

Update Attribute Lookups with New Attributes

You can add new attributes to the subset selection criteria, by adding the required attributes to the attribute lookup types for person (contact) object `ZCH_MATCH_OBJ_PERSON` or to the organization (account) object, `ZCH_MATCH_OBJ_ORGANIZATION`, respectively.

You can follow these steps to add the required attributes to the attribute lookup types as lookup codes:

1. Sign in as a setup user, such as Master Data Management Application Administrator. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Standard Lookups
2. Search for and navigate to the task **Manage Standard Lookups**.
3. Enter the required **Lookup Type**.
   - Use the lookup type `ZCH_MATCH_OBJ_ORGANIZATION` to add new custom or standard attributes to the subset rule selection criteria of the organization (account) object.
   - Use the lookup type `ZCH_MATCH_OBJ_PERSON` to add new attributes to the subset rule selection criteria of the person (contact) object.
4. Click **Search**.
5. Click **New** on the Lookup Codes section of the Manage Standard Lookups page.
6. Add a Lookup Code for each attribute.
   - **Lookup Code**: An internal name for the attribute. This field is case-sensitive. The value should be in all capital letters and the space should be replaced with an underscore. For example, CUSTOM_ATTR can be a lookup code for custom attribute.

     > **Note:** For date fields, you must suffix the lookup code with _DATE. This enables the application to identify the attribute value as date and display the date picker.

   - **Display Sequence**: The order in which the lookup code must be displayed. This isn't a mandatory field.
   - **Meaning**: The display name of the attribute. This field is mandatory and case-sensitive.
   - **Description**: The description of attribute that you see on the duplicate identification work area.
   - **Tag**: The API (Internal) Name of the attribute. This field is mandatory and case-sensitive.
7. Click **Save and close**.

ORACLE

To hide or remove any attribute, you must delete the lookup code.

> **Note:** You must publish the sandbox to activate the newly added attributes. Only after you publish the sandbox, the newly added attributes appears in the Subset Rules for Identifying Duplicates section of the Create Duplicate Identification Batch page. If the sandbox isn't published, the tag value with the attribute name is considered invalid.

List of Additional Attributes for Subset Rule

You can find a detailed description of the standard account and contact attributes available for use in Subset Rule Selection Criteria in this topic.

> **Note:** For date related attributes, you must suffix the lookup code with _DATE. Standard Attributes for Accounts.

Standard Attributes for Accounts

This table lists the standard attributes for account (organization) along with their lookup code, display name (meaning), and API name (tag) that you can add as subset rule selection criteria for identifying duplicates:

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
ANALYSIS_FY	Analysis Year	AnalysisFy
BANK_CODE	Bank Code	BankCode
BANK_OR_BRANCH_NUMBER	Bank or Branch Number	BankOrBranchNumber
BRANCH_CODE	Branch Code	BranchCode
BRANCH_FLAG	Branch Indicator	BranchFlag
BUSINESS_SCOPE	Business Scope	BusinessScope
CEO_NAME	Chief Executive Name	CeoName
CEO_TITLE	Chief Executive Title	CeoTitle
CERTIFICATION_LEVEL	Certification Level	CertificationLevel
CERTREASON_CODE	Certification Reason	CertReasonCode
CLEANLINESS_SCORE	Cleanliness	CleanlinessScore

ORACLE

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
COMMENTS	Comments	Comments
COMPLETENESS_SCORE	Completeness	CompletenessScore
CONG_DIST_CODE	Congressional District	CongDistCode
CONTROL_YR	Organization Control Year	ControlYr
CORPORATION_CLASS	Corporation Class	CorporationClass
CREATION_DATE	Creation Date	CreationDate
CURRENT_FY_POTENTIAL_REV	Current Fiscal Year's Potential Revenue	CurrFyPotentialRevenue
DATA_CLOUD_STATUS	Enrichment Status	DataCloudStatus
DATA_CONFIDENCE_SCORE	Data Confidence	DataConfidenceScore
DB_RATING	D&B Credit Rating	DbRating
DIS_ADV_IND	Disadvantaged Indicator	DisadvantagedIndicator
DOM_ULTIMATE_DUNSNUM_C	Domestic D-U-N-S number	DomesticUltimateDunsNumC
DO_NOT_CONFUSE_WITH	Do Not Confuse With	DoNotConfuseWith
DUNS_NUMBER_C	D-U-N-S number	DunsNumberC
DUPLICATE_INDICATOR	Duplicate Type	DuplicateIndicator
DUPLICATE_SCORE	Duplication	DuplicateScore
EmailAddress	Email Address	EmailAddress
EMPS_AT_PRIMARY_ADDRESS	Number of Employees at Identifying Address	EmpAtPrimaryAdr
EMPS_AT_PRIMARY_ADDR_EST	Number of Employees at Identifying Address Estimated Qualifier	EmpAtPrimaryAdrEstInd
EMPS_AT_PRIMARY_ADDR_MIN	Number of Employees at Identifying Address Minimum Qualifier	EmpAtPrimaryAdrMinInd
EMPLOYEES_TOTAL	Number of Employees	EmployeesTotal

ORACLE

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
ENQUIRY_DUNS	ENQUIRY_DUNS	EnquiryDuns
ENRICHMENT_SCORE	Enrichment	EnrichmentScore
EXPORT_IND	Exporter Indicator	ExportInd
FISCAL_YEAREND_MONTH	Fiscal Year End Month	FiscalYearendMonth
GLOBAL_ULTIMATE_DUNSNUM_C	Global Ultimate D-U-N-S Number	GlobalUltimateDunsNumC
GROWTH_STRATEGY_DESC	Growth Strategy Description	GrowthStrategyDesc
GSA_INDICATOR_FLAG	GSA Indicator	GsaIndicatorFlag
HOME_COUNTRY	Home Country	HomeCountry
HQ_BRANCH_INDICATOR	HQ branch indicator	HqBranchInd
IMPORT_IND	Importer Indicator	ImportInd
INCORP_YEAR	Year Incorporated	IncorpYear
INTERNAL_FLAG	Internal	InternalFlag
JGZZ_FISCAL_CODE	Taxpayer identification number	JgzzFiscalCode
LABOR_SURPLUS_IND	Labor Surplus Indicator	LaborSurplusInd
LAST_ASSIGNMENT_DATE	Last Assigned Date	LastAssignedDate
LAST_ENRICHMENT_DATE	Last Enrichment Date	LastEnrichmentDate
LAST_SCORE_UPDATE_DATE	Last Score Date	LastScoreUpdateDate
LAST_SOURCE_UPDATE_DATE	Last Source Update Date	LastSourceUpdateDate
LAST_UPDATE_DATE	Last modified date	LastUpdateDate
LAST_UPDATED_BY	Last modified by	LastUpdatedBy
LAST_UPDATE_SOURCE_SYSTEM	Last Update Source System	LastUpdateSourceSystem

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
LEGAL_STATUS	Legal Status	LegalStatus
LINE_OF_BUSINESS	Line of Business	LineOfBusiness
LOCAL_ACTIVITY_CODE	Local Activity Code	LocalActivityCode
LOCAL_ACTIVITY_CODE_TYPE	Local Activity Code Type	LocalActivityCodeType
LOCAL_BUS_IDENTIFIER	Common Business Identifier	LocalBusIdentifier
LOCAL_BUS_IDEN_TYPE	Common Business Identifier Type	LocalBusIdenType
MINORITY_OWNED_IND	Minority-Owned Indicator	MinorityOwnedInd
MINORITY_OWNED_TYPE	Type of Minority-Owned Organization	MinorityOwnedType
MISSION_STATEMENT	Mission Statement	MissionStatement
NAMED_FLAG	Named Account	NamedFlag
NEXT_FY_POTENTIAL_REVENUE	Next Fiscal Year's Potential Revenue	NextFyPotentialRevenue
OOB_IND	Out of Business Indicator	OobInd
ORGANIZATION_NAME	Name	OrganizationName
OWNER_PARTY_ID	Owner ID	OwnerPartyId
PARENT_DUNS_NUMBER_C	Parent D-U-N-S Number	ParentDunsNumC
PARENT_SUB_IND	Subsidiary Indicator	ParentSubInd
PARTY_ID	Party Id	PartyId
PARTY_NUMBER	Registry ID	PartyNumber
PREF_CONTACT_METHOD	Preferred Contact Method	PreferredContactMethod
PREF_CONTACT_PERSON_ID	Preferred Contact Person Id	PreferredContactPersonId
PREF_FUNCTIONAL_CUR	Preferred Functional Currency	PrefFunctionalCurrency

ORACLE

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
PrimaryPhoneNumber	Primary Phone	PrimaryPhoneNumber
PRINCIPAL_NAME	Principal Name	PrincipalName
PRINCIPAL_TITLE	Principal Title	PrincipalTitle
PUBLIC_PRIVATE_OWNER_FLAG	Private Ownership	PublicPrivateOwnershipFlag
RECENCY_SCORE	Recency	RecencyScore
REGISTRATION_TYPE	Registration Type	RegistrationType
RENT_OWN_IND	Rent or Own Indicator	RentOwnInd
SALES_PROFILE_STATUS	Sales Profile Status	SalesProfileStatus
SALES_PROFILE_TYPE	Type	SalesProfileType
SMALL_BUS_IND	Small Business Indicator	SmallBusInd
STOCK_SYMBOL	Stock Symbol	StockSymbol
TOTAL_EMP_EST_IND	Number of Employees Estimated Qualifier	TotalEmpEstInd
TOTAL_EMPLOYEES_IND	Number of Employees Includes Subsidiaries	TotalEmployeesInd
TOTAL_EMP_MIN_IND	Number of Employees Minimum Qualifier	TotalEmpMinInd
TOTAL_EMP_TEXT	Total Number of Employees	TotalEmployeesText
TOTAL_PAYMENT_AMOUNT	Total Payments	TotalPayments
UNIQUE_NAME_ALIAS	Organization Name	UniqueNameAlias
UNIQUE_NAME_SUFFIX	Name Suffix	UniqueNameSuffix
VALIDITY_SCORE	Validity	ValidityScore
WOMAN_OWNED_IND	Woman-Owned Indicator	WomanOwnedInd
YEAR_ESTABLISHED	Year Established	YearEstablished

ORACLE

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)

Standard Attributes for Contact

This table lists the standard attributes for contact (person) along with their lookup code, display name (meaning), and API name (tag) that you can add as subset rule selection criteria for identifying duplicates:

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
CERTIFICATION_LEVEL	Certification Level	CertificationLevel
CERT_REASON_CODE	Certification Reason	CertReasonCode
CLEANLINESS_SCORE	Cleanliness	CleanlinessScore
COMMENTS	Comments	Comments
COMPLETENESS_SCORE	Completeness	CompletenessScore
CREATED_BY	Created by	CreatedBy
CREATION_DATE	Creation date	CreationDate
DATA_CLOUD_STATUS	Enrichment Status	DataCloudStatus
DATA_CONFIDENCE_SCORE	Data Confidence	DataConfidenceScore
DATE_OF_BIRTH_DATE	Date of Birth	DateOfBirth
DATE_OF_DEATH_DATE	Date of Death	DateOfDeath
DECEASED_FLAG	Person Deceased	DeceasedFlag
DECLARED_ETHNICITY	Declared Ethnicity	DeclaredEthnicity
DEPARTMENT	Department	Department
DEPARTMENT_CODE	Department Code	DepartmentCode
DO_NOT_CALL_FLAG	Do not call	DoNotCallFlag
DO_NOT_CONTACT_FLAG	Do not contact	DoNotContactFlag

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
DO_NOT_EMAIL_FLAG	Do not e-mail	DoNotEmailFlag
DO_NOT_MAIL_FLAG	Do not mail	DoNotMailFlag
DUPLICATE_INDICATOR	Duplicate Type	DuplicateIndicator
DUPLICATE_SCORE	Duplication	DuplicateScore
EmailAddress	Email Address	EmailAddress
ENRICHMENT_SCORE	Enrichment	EnrichmentScore
GENDER	Gender	Gender
INTERNAL_FLAG	Internal	InternalFlag
JGZZFISCAL_CODE	Taxpayer identification number	JgzzFiscalCode
JOB_TITLE	Job Title	JobTitle
JOB_TITLE_CODE	Job Title Code	JobTitleCode
LAST_ASSIGNMENT_DATE	Last Assigned Date	LastAssignedDate
LAST_CONTACT_DATE	Last Contact Date	LastContactDate
LAST_ENRICHMENT_DATE	Last Enrichment Date	LastEnrichmentDate
LAST_KNOWN_GPS	Last Known Location	LastKnownGPS
LAST_SCORE_UPDATE_DATE	Last Score Date	LastScoreUpdateDate
LAST_SOURCE_UPDATE_DATE	Last Source Update Date	LastSourceUpdateDate
LAST_UPDATE_DATE	Last modified date	LastUpdateDate
LAST_UPDATED_BY	Last modified by	LastUpdatedBy
LAST_UPDATE_SOURCE_SYS	LastUpdateSourceSystem	LastUpdateSourceSystem
MARITAL_STATUS	Marital Status	MaritalStatus

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
MARITAL_STATUS_EFF_DATE	Marital Status Effective Date	MaritalStatusEffectiveDate
NAMED_FLAG	Named Contact	NamedFlag
OWNER_PARTY_ID	Owner ID	OwnerPartyId
PARTY_ID	PartyId	PartyId
PARTY_NUMBER	Registry ID	PartyNumber
PERSON_ACADEMIC_TITLE	Academic Title	PersonAcademicTitle
PERSONAL_INCOME	Annual Income	PersonalIncome
PERSON_FIRST_NAME	First name	PersonFirstName
PERSON_INITIALS	Initials	PersonInitials
PERSON_LAST_NAME	Last name	PersonLastName
PERSON_LAST_NAME_PREFIX	Last Name Prefix	PersonLastNamePrefix
PERSON_MIDDLE_NAME	Middle Name	PersonMiddleName
PERSON_NAME_SUFFIX	Suffix	PersonNameSuffix
PERSON_PRENAME_ADJUNCT	Prefix	PersonPreNameAdjunct
PERSON_PREV_LASTNAME	Previous Last Name	PersonPreviousLastName
PERSON_SECOND_LASTNAME	Second Last Name	PersonSecondLastName
PERSON_TITLE	Title	PersonTitle
PLACE_OF_BIRTH	Place of Birth	PlaceOfBirth
PREF_CONTACT_METHOD	Preferred Contact Method	PreferredContactMethod
PREF_FUNCTIONAL_CUR	Preferred Functional Currency	PrefFunctionalCurrency
PrimaryPhoneNumber	Primary Phone	PrimaryPhoneNumber

ORACLE

Lookup Code	Meaning (Attribute Display Name)	Tag (API Name)
RECENCY_SCORE	Recency	RecencyScore
RENT_OWN_IND	Rent or Own Indicator	RentOwnInd
SALES_AFFINITY_CODE	Affinity	SalesAffinityCode
SALES_BUYING_ROLE_CODE	Buying Role	SalesBuyingRoleCode
SALES_PROFILE_STATUS	Sales Profile Status	SalesProfileStatus
SALES_PROFILE_TYPE	Type	SalesProfileType
SALUTATION	Salutation	Salutation
UNIQUE_NAME_SUFFIX	Name Suffix	UniqueNameSuffix
VALIDITY_SCORE	Validity	ValidityScore

Create Duplicate Identification Batches and Define Subset Rules

You can create a duplicate identification batch and define subset rules to retrieve a subset of the records to identify duplicates within the batch or in the database.

Subset rules, also known as batch selection criteria rules, specify the criteria for retrieving a subset of records in the duplicate identification batch. The data quality engine identifies potential duplicates from this subset of records based on one of these rules:

- Match all keywords: Select this option to perform an AND operation.

- Match any keyword: Select this option to perform an OR operation.

Now that you have an overview of the task, let's first create a duplicate identification batch to identify duplicate persons in the registry, and then create a rule to retrieve a subset of records where the person name contains John and the address contains Redwood. Note that you can use predefined or custom attributes.

1. Navigate to the Duplicate Identification work area as follows: **Navigator** > **Customer Data Management** > **Duplicate Identification** .
2. Click **Create** menu option or button. The **Create Duplicate Identification Batch** page appears.
3. Enter a batch name and description.

   Note: Another way is to copy an existing duplicate identification batch and quickly create a new batch from it. You can modify the details for this batch before submitting it.

4. Specify the **Batch Match Mode** such as **Against the Registry** or **Within the Batch**.

ORACLE

In the **Within the Batch Match** mode, the duplicate identification is limited to the records in a batch that meet the subset rule conditions. In the **Against the Registry Batch Match** mode, the process aggregates the records that meet the subset rule conditions in a batch, and these records are matched against one another as well as against other records in the database.

5. Specify the **Party Type** as **Person**.

6. Specify the **Automatic Processing** option as **Create Merge Request** to merge the duplicate persons.

7. Provide the **Batch Options**. The batch options available depends upon the selected **Automatic Processing Option**. The following options are available when **Create Merge Request** is selected as the **Automatic Processing Option**:

   o Select an appropriate value for **Cluster Key Level** such as Typical.

   o Enter a value between 1 and 101, such as 70 for **Match Threshold**.

   o Enter a value between 1 and 101, such as 75 for **Automerge Threshold**.

   > **Note:** You need to keep in mind that the **Automerge Threshold** and **Autolink Threshold** values that you provide in the Batch Options area override the values set in the Manage Customer Hub Profile Options page.

   o Select **Send Notifications** to notify the status of the duplicate identification batch to all interested parties such as initiator or submitter. For more information about these statuses, see How You Merge Duplicate Records in the Related Topics section. The default value for the Send Notifications field is set using the Merge Request Notifications option in the Manage Customer Data Management Options Setup and Maintenance task. You can't set the value of the Send Notifications field if the Merge Request Notifications option is set to disable all notifications. For more information about Merge Request Notifications, see Duplicate Resolution Simplified Profile Options topic in the Related Topics section.

8. Click **Add** menu option or button under **Duplicate Identification Batch: Selection Criteria**.

9. Specify the **Apply Rules** options as **Match any keyword**.

10. Enter the following sample information in the Duplicate Identification Batch: Selection Criteria table:

Object	Attribute	Operator	Value
Person	Name	Starts with	John
Address	Address Line 1	Contains	Redwood

11. Click **Save and Close** or **Schedule** per your requirement.

Related Topics

- Automerge
- How do I merge duplicate records?
- Customer Hub Profile Options

ORACLE

Create and Submit Resolution Requests in Duplicate Identification Work Area

After you have identified potential duplicates in your database through a duplicate identification batch, you can resolve these duplicate sets by creating and submitting a duplicate resolution request.

Each duplicate set contains two or more potential duplicate records, which are identified by the application for your review. You can analyze each of these duplicate sets and modify them. For example, you can

- View the match rule names to understand why a duplicate set was formed and which match rule drove the duplicate identification score. To display the Match Rule column, click **View** > **Columns** > **Match Rule**. The ability to view match rules also simplifies the validation of the match configuration. Implementors can fine-tune match rules and test the effects of rule changes on the duplicate identification result sets.

- Remove records that you don't want to include in the duplicate resolution request. You can also restore the previously removed records back to the set from the removed records table.

- Mark a pair of records as nonduplicate, so that these records aren't identified as potential matches. You can remove the pair from the nonduplicate list by changing the end date.

- Change the master record.

To create and submit a resolution request:

1. Navigate to the Duplicate Identification work area as follows: **Navigator** > **Customer Data Management** > **Duplicate Identification**.
2. Click on the Batch ID of the batch for which that you want to review and resolve duplicate sets. The application displays a list of sets containing duplicate records.
3. Click on the Duplicate ID of the set that you want to review for resolution.
4. Review the duplicate records in the selected set and determine whether you want to merge or link these records. You can view the Match Rule column to understand the match rule that drove the duplicate identification score of each record. To display the Match Rule column, click **View** > **Columns** > **Match Rule**. Note that the match rule for the master record is blank.
5. Click Create Request and specify an appropriate duplicate resolution request type, such as Merge (to combine duplicate records), Link (to join duplicate records), Test Merge (to test the merge configuration without impacting the application data) or Generic (to select the resolution later). Once the request is submitted, the application generates a Request ID, which you can use to track the status of the duplicate resolution process.

   Note: The approval for processing this request is controlled by the ORA_ZCH_DS_MERGE_REQUESTS profile option. This profile option can be set using the Data Steward Merge Handling Setting in the Manage Customer Data Management Options setup task.

   Note: The master record designation within the duplicate set is a preliminary value and the final determination of the master record occurs within the duplicate resolution process based on the duplicate resolution Master Record Selection Setting option.

ORACLE

View Nonduplicate Mapping

Manage Nonduplicate Records

You mark a pair of records as nonduplicate, so that this pair isn't identified as a potential match.

You can view such nonduplicate records on the Manage Nonduplicate Records, UI page using these steps:

1. Navigate to the Duplicate Identification work area.
2. Click Tasks.
3. Click Manage Nonduplicate records. The Manage Nonduplicate Records page appears.
4. Search for the nonduplicate records.

You can modify the period for which a record is a nonduplicate by changing the end date. You can also delete the nonduplicate status of a record by changing the end date.

FAQs for Duplicate Identification

Why am I unable to assign or reject duplicate identification batches?

Your ability to assign or reject a duplicate identification batch is dependent on your role in the application. If you're a Data Steward Manager, you can assign batches to data stewards and also reject any batch. However, as a Data Steward, you won't be able to assign batches to others. Also, you can only reject the batches that are assigned to you. As a Data Steward Manager, you can assign a duplicate identification batch by using the **Assign** button on the Duplicate Identification Batch page. You can choose the assignees from the 'Assign To' list on the Assign Duplicate Identification Batch page, but, keep in mind that only the users who are assigned with the role of Data Steward will be visible in this list.

How can I cancel a batch process?

You can cancel a batch process in the Scheduled Processes Overview page. You can navigate to this page as follows: **Navigator** > **Tools** > **Scheduled Processes**. You must search for the batch process by its process ID, and then cancel the batch process request.

How can I schedule a saved duplicate identification batch?

You can schedule a saved duplicate identification batch by searching for it on the Duplicate Identification work area and editing its processing options.

ORACLE

When do I select the Create Single Request option?

You use the **Create Single Request** option on an individual duplicate set in a batch to specify duplicate processing options at a set level. You typically use this option to specify duplicate processing options at individual duplicate set level that are different from the duplicate processing options selected at the batch level. You can specify different duplicate processing options for different duplicate sets, using this option.

ORACLE

9 Resolve Duplicates

How do I create duplicate resolution requests?

You create a duplicate resolution request to resolve potential duplicates in the database.

Depending on your business scenarios, you may create duplicate resolution requests using one of the following options:

- Create Duplicate Resolution Requests Manually.
- Create Duplicate Resolution Requests during the Duplicate Identification Flow.

Create and Process Generic Resolution Requests

You can choose to create a generic duplicate resolution request when not clear whether you want to merge or link the duplicate parties. Specifying a generic resolution request lets you make the merge or link decision later. You have the option of creating generic duplicate resolution requests while:

- Creating duplicate identification batches by selecting the None as the Automatic Processing option on the Create Duplicate Identification Batch page.
- Reviewing duplicate sets and creating single requests for each duplicate set on the Duplicate Identification Batch details page.
- Creating a duplicate resolution request manually for confirmed duplicates on the Create Resolution Request UI page.

You can review these resolution requests on the Duplicate Resolution work area and complete processing them by creating duplicate resolution requests of the type merge or link. For more information, see the How You Process Duplicate Resolution Requests topic.

Create Duplicate Resolution Requests Manually

When you're sure that two or more records are confirmed duplicates, you can decide to create a duplicate resolution request manually using the following steps:

1. Navigate to the Duplicate Resolution work area as follows: **Navigator > Customer Data Management > Duplicate Resolution**.
2. Click **Tasks** and then click **Create Resolution Request.**
3. Search for the records that you want to merge, link, or test merge. For example, select the Party Type as Person and enter the Name as John, and click Search.

   > **Note:** You can only search on standard fields using the Advanced Search option. Custom fields of the Accounts or Contacts objects aren't available.

4. Select two or more duplicate records using the Shift or Control key.
5. Click **Actions > Create Request**.
6. Enter a name for the request in the **Create Request: Select Type dialog**.
7. Select the request type as Merge, Link, or Test Merge. You can also select the Master Record, if needed.
8. Click **OK**.

ORACLE

You can also submit request dispatch jobs directly from the Duplicate Resolution work area by clicking the Dispatch button, which will submit the job for immediate processing.

Create Duplicate Resolution Requests during the Duplicate Identification Flow

You create a duplicate identification batch in the Duplicate Identification work area to identify potential duplicates in the database.

As part of the duplicate identification batch creation flow, you have the option of specifying a duplicate resolution request of an appropriate type, such as merge, link or none, to resolve the identified duplicates. You can also create a duplicate resolution request of type Test Merge to test the merge request configuration without changing your application data. This test option helps you fine-tune your merge request configurations such as survivorship rules and agreement rules.

Considerations for Selecting the Duplicate Resolution Request Type

You can resolve duplicates by creating a duplicate resolution request to either merge or link the potential duplicate records. The type of request that you select determines how these duplicate records are handled after resolution.

Test Merge

You can create a duplicate resolution request of type Test Merge to test your merge request configuration, such as survivorship rules and agreement rules, without:

- Changing the application data

- Depending upon Run Request Dispatcher Job task to review merge results

This helps you to get immediate feedback on the behavior of your merge configuration. After the test merge request is complete, you can drill down into the test resolution request to examine the results of the merge. You can also choose the override flow for the merge request to inspect the merge behavior in complete detail.

Merge Request

You create a merge duplicate resolution request to combine duplicate records into one new master record. After the merge request is completed, all duplicate records are deleted from the data registry and you can update only the master record. The duplicate records that are deleted are also called non-master records. Note that merge supports transfer of attachments from duplicate records to master record.

Link Request

You create a link request to associate the duplicate records. The linked records are treated as unique records in the data registry, and have their own unique identifiers.

While creating the request, you define one of the records as the master record. The resolution process marks and links the other records to the master record, and marks them as duplicates.

ORACLE

Related Topics
- Why You Link Duplicate Records

Process Duplicate Resolution Requests

You can review and process duplicate resolution requests in new status in the Duplicate Resolution work area.

As part of processing these requests, you can:

- Choose to submit or reject them.
- Decide the duplicate resolution request type, merge or link, based on whether you want to merge or link the duplicate records.

You can create duplicate resolution requests while:

- Create duplicate identification batches by selecting the Create Merge Request as the Automatic Processing option on the Create Duplicate Identification Batch page. Review duplicate sets and creating single requests for each duplicate set on the Duplicate Identification Batch details page.
- Create a duplicate resolution request manually for confirmed duplicates on the Create Resolution Request UI page.

A request dispatcher is run periodically for pending requests, and it sets the status of pending requests to New. You can also request your administrator to run the Run Request Dispatch Job from the Setup and Maintenance area to set the status of the pending requests to New.

> **Note:** A setup user can access the Run Request Dispatch Job task in the Setup and Maintenance work area, using the following:
> - Offering: Customer Data Management
> - Functional Area: Customer Hub
> - Task: Run Request Dispatch Job
>
> You can also submit request dispatch jobs directly from the Duplicate Resolution work area by clicking the Dispatch button, which will submit the job for immediate processing. You can process a duplicate resolution request using these steps:
> - Select the duplicate resolution request to process.
> - Select the duplicate resolution request type.
> - Manage the duplicate set.

ORACLE

> **Note:** Use the **Purge Duplicate Resolution Data** scheduled process to purge the duplicate resolution data such as resolution logs and to delete duplicate resolution batches and requests. You can schedule this process from the Scheduled Processes work area. You can access this work area as follows: **Navigator** > **Tools** > **Scheduled Processes**. Similarly, you can purge merged records using the Manage Party Purge Activities scheduled process. If you purge merged records, the non-master records of the merge request are purged too.

Select Duplicate Resolution Request

1. Navigate to the Duplicate Resolution work area.
2. Select a new duplicate resolution request.

Select Duplicate Resolution Request Type

1. Click the **Process** option on the Actions menu on the Duplicate Resolution work area.
2. On the Select Type of Request page, select the duplicate resolution request type as:

   - Merge - to combine duplicate records

   - Link - to join duplicate records with the master record

   - Test Merge - to test the merge request configuration without modifying your application data

Manage Duplicate Sets

1. As appropriate, mark a record as nonduplicate, set as master a record other than the default master record, remove records that you don't want to include in the resolution request.
2. Submit the duplicate set, as appropriate, as merge or link requests for resolution.

Related Topics
- Considerations for Selecting the Duplicate Resolution Request Type
- How You Manage Duplicates

Duplicate Resolution Request Statuses

You can get detailed reasons for the rejection or failure of a duplicate resolution request from it's status.

You can use the status to correct data or system errors, and resubmit a resolution request with the updated data for processing. For more information, see Configuring the Diagnostic Testing Framework for Normal Operation, Oracle Fusion Applications Administrator's Guide 11g Release 1 (11.1.1.5).

The request status check uses the resolution request ID of the duplicated resolution request as an input parameter to check the request status. The duplicate resolution request status can be Rejected, Error, Completed, or Pending. The check result also includes the reasons for the status.

You can select one or more merge requests that are in new, error, or rejected statuses and change their status to pending by clicking **Action** > **Reset** on the Duplicate Resolution page. However, you can't change the status of a merge request that's in completed status.

ORACLE

How do I merge duplicate records?

Let's have a look at the process to merge records for resolving duplicates.

Suppose you have created a merge request. Your request may undergo some or all of the following processing stages before the merge is performed. In this process flow, we assume that notifications are turned on. For more information about turning on notifications for merge requests, see the Related Topics section.

- First the survivorship rules are used to determine the master record for the merge.

- After this, the agreement rule check is performed to verify if the merge request is violating any veto conditions. If the agreement rule check succeeds then a check is performed to determine if system mapping must be overridden or not. If the agreement rule check fails, then the merge request is rejected and a rejection notification is sent to the initiator.

- However, a rejected merge request can also be restored in which case a new merge request is created.

- If system mapping is overridden then the new mapping is stored before the merge request can be submitted. After the merge request is submitted, the actual merge is performed.

- If the merge completes successfully then a completion notification is sent to the initiator and the submitter. If the merge fails then an error notification is sent to the initiator and the submitter.

Note: Check if you have the Master Customer Data Management Administrator role to perform merge. Use the Purge Duplicate Resolution Data scheduled process to purge the duplicate resolution data such as resolution logs and to delete duplicate resolution batches and requests. You can schedule this process from the Scheduled Processes work area. You can access this work area as follows: **Navigator** > **Tools** > **Scheduled Processes**.

Let's look at the following figure that illustrates the merge process flow.
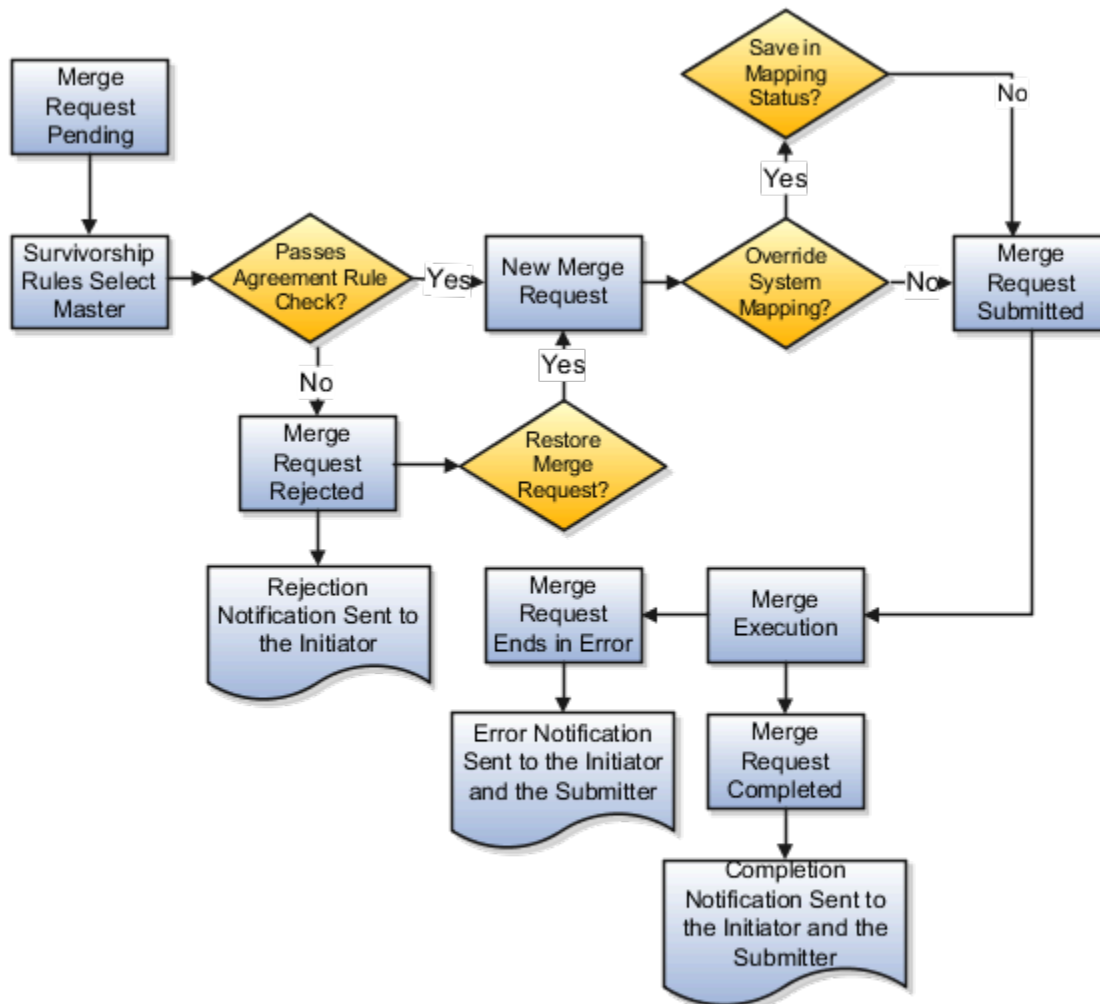
Merge Request Creation Options

A merge request is created as a result of one of the following:

- The batch duplicate identification process creates a duplicate resolution request automatically for each identified duplicate set.

- A data steward or another user creates a merge request and submits the request through the Create Resolution Request UI page or through the Accounts or Contact UI page.

- A data steward or another user creates a merge request for processing a generic resolution request on the Duplicate Resolution work area.

ORACLE

- You can create a test merge request, examine the results, modify the test merge configuration multiple times until you're satisfied with the merge results, and then create a merge request as per your requirements.

- A bulk or file-based import process creates a merge request.

Note: You can also use the duplicate resolution request web service to create merge requests.

List of Merge Request Statuses

Your merge request may be in different statuses depending on its stage of processing.

This table lists the possible statuses of a merge request.

Status	Description
Pending	All merge requests, and generic duplicate resolution requests, are created with the status as Pending. The requests with pending status require review by a data steward.
New	The request dispatcher is run periodically for pending requests, and sets status of pending requests to New. When the request dispatcher is run, the application selects the master record and attributes based on the survivorship rules, and runs the agreement rule check for the request.
Submitted	This status indicates that the merge request has been submitted for processing. You can also create merge requests with the status as Submitted to process the request without data steward intervention.
Rejected	This status indicates that the merge request is rejected by the data steward or by the process for agreement rule violations. You can restore a rejected merge request.
Error	This status indicates the request has failed because one or more records can't be processed.
Completed	This status indicates that the request has been processed successfully.

How You Select Master and Records to Merge

You can review new merge requests to:

- Select the master record
- Mark records as nonduplicates
- Remove records from the duplicate set to avoid merging them

The merge process selects the master record based on set master rules, if survivorship rules are active. However, you can select to review and override system settings.

When to Override System Mapping

You can override system mappings, during the merge request review, if the system mapping of the request doesn't meet your requirements. You can select the accounts, account addresses, and the relationships that should be merged, transferred, or removed.

Merge Request Related Notifications

You can enable or disable notifications to notify the status of merge requests to interested parties. You can choose to enable notifications while you're creating a duplicate identification batch or while processing individual duplicate resolution requests. For more information about creating a duplicate identification batch, see Create Duplicate Identification Batches and Define Subset Rules Related Topics section. To receive notifications for individual duplicate resolution requests, select the request and click **Actions > Notify** in the Duplicate Resolution work area.

The merge process sends the following related notifications:

- Rejection: This notification is sent to the merge request's initiator, such as a business user, salesperson, or administrator. You can restore and resubmit a rejected merge request, by selecting a different master record or by removing some records from the batch.

- Error: This notification is sent to the merge request's initiator and submitter. The notification indicates that the merge request has errors and can't be processed.

- Completion: This notification is sent to the initiator and the assignee of the merge process. The process merges duplicate records and updates the record hierarchies. The notifications include information such as the master and duplicate records.

After receiving the completion notification, the request initiator and assignee can:

- Verify if the updated hierarchies are correct in the Manage Hierarchies work area.

- Optionally, make the necessary edits to the updated hierarchies.

Related Topics
- How do I override system mapping?
- Create Duplicate Identification Batches and Define Subset Rules

How do I override system mapping?

You can override system mapping for merge requests by manually modifying it. To manually modify system mapping, you must select the master record and its associated attributes, and then specify the resolution for the child entity conflicts and errors.

You can resolve child entity conflicts and errors by merging, transferring, or removing the record attributes.

You can override system mapping using these steps:

1. Navigate to the Duplicate Resolution work area as follows: **Navigator > Customer Data Management > Duplicate Resolution**.

ORACLE

2. Select the duplicate resolution request for which you want to override system mappings and drill down through the request ID to the **Review Merge Request** page.

> **Note:** You can override system mappings only for those merge requests that are in New status, which indicates that the request is open for review and processing. The status depends on the following:
> - The merge request isn't an auto-merge request and the profile option ZCH_USER_MERGE_REQUESTS is set to Process Subject to Approval. For more information about this profile option, see Customer Hub Profile Options topic listed in the Related Links section.
> - Your administrator has run the Run Request Dispatch Job from the Setup and Maintenance area to change the merge request status from Pending to New. A request dispatcher is run periodically for pending merge requests, and sets the status of pending requests to New. You can also request your administrator to run the Run Request Dispatch Job from the Setup and Maintenance area to set the status of the pending requests to new. A setup user can access this task in the Setup and Maintenance work area, using the following:
>   - Offering: Customer Data Management
>   - Functional Area: Customer Hub
>   - Task: Run Request Dispatch Job

3. Click **Override** on the **Review Merge Request** page to view the **Override System Mapping: Select Master Record** page.
4. In the duplicate set on the page, select the record that you want to make the master and click **Set Master**.

   Optionally, you can also remove records from the duplicate set to prevent them from being merged. You can also mark the removed record as a nonduplicate to exclude it from all the subsequent merge requests.
5. Click **Next** to navigate to the **Override System Mapping: Map Profile Attributes** page.
6. Select a value from any of the duplicate records for each profile attribute to be retained in the master record.

   If the number of duplicate records is five or less than five, you can select the value from the record columns. If the number of duplicate records is greater than five, you can select the value from the value choice list. In the profile attribute value choice list, you can hover over the value to see the attribute value's record. This helps you associate the correct value with the master record. You can also manually enter a new value in the **Final Value** column for an attribute.
7. On the **Override System Mapping: Map Entities** page, you can merge two or more entities into a single entity. You can also remove merge entities, such as addresses, from the merge processes by clicking the Remove icon. If the Remove icon isn't available, you must enable the ORA_ZCH_ALLOW_REMOVE_FEATURE profile option. For more information about creating this profile option, see the Enable the Remove Option on the Override System Mapping UI section in this topic. Child entities associated with the entities that are removed using the Remove icon won't be transferred to the master record.
8. Click **Next** to view the **Override System Mapping: Review** page. Now you can review the mapping settings and click Submit to override the default system mappings. In case there are edits, click Back to make updates to the mapping settings before submission.

ORACLE

Enable the Remove Option on the Override System Mapping UI

You can enable the Remove icon on the Override System Mapping UI by enabling the profile option ORA_ZCH_ALLOW_REMOVE_FEATURE by setting its value to Yes as follows:

1. Sign in as a setup user such as, Sales Administrator, Master Data Management Application Administrator, or Application Implementation Consultant.
2. Click **Navigator** > **Setup and Maintenance** work area.
3. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
4. Search for the Profile Option ORA_ZCH_ALLOW_REMOVE_FEATURE.
5. Click Actions, New in the ORA_ZCH_ALLOW_REMOVE_FEATURE: Profile Values area.
6. Select **Site** as the profile level and **Y** as the profile value.
7. Click **Save and Close**.

How do I remove a party from duplicate resolution request?

Removing a party from a duplicate resolution request doesn't automatically modify attribute level mappings of the request. If you want to manually remove parties from a merge request, you must either manually select the values that have to be removed from the 'Map Profile Attributes' page, or reprocess the merge request after removing the party using the following steps:

1. Remove a party from a duplicate resolution request as described in the beginning of this topic and click **Save and Close**.
2. Select the merge request and click **Reset**.
3. Select the merge request and click **Dispatch** to run the dispatch job once again.

Related Topics
- Customer Hub Profile Options

Automerge

The automerge functionality merges duplicate records without any approval or intervention from the data steward. Automatic processing of merge requests is critical when processing large volumes of customer data as automerge can expedite the resolution of duplicate records without manual review.

During automerge, the child entities of the duplicate records, such as contact points, relationships, classifications, and cross references, become the child entities of the master record. Note that groovy scripts on relationship objects don't run during merges. If they're critical, you can re-implement the scripts on the parent account or contact.

How Records are Selected for Automerge

Records are selected for automerge based on the following criteria:

- Score threshold: The score threshold is defined in the Match Configuration and determines if a record is included in a duplicate set.
- Automerge threshold: The automerge threshold is defined by the ZCH_AUTO_MERGE_THRESHOLD profile option and determines if the merge request for a duplicate set is processed automatically or if it must be reviewed manually.

ORACLE

Three possible outcomes for each record with regard to duplicate identification and merging are as follows:

- Low score below score threshold: The record isn't included in duplicate set and in the merge request for that duplicate set.

- Medium score above score threshold and below automerge threshold: The record is included in duplicate set but merge request for that duplicate set must be reviewed manually.

- High score above score threshold and above automerge threshold: The record is included in duplicate set and merge request is processed automatically.

The score for all the records in a duplicate set must be above the automerge threshold for automated processing. If one record in the duplicate set is below automerge threshold, and the other records are above the automerge threshold, the merge request must be reviewed manually.

> **Note:** When you merge two or more records with exactly same children information under phone, email, or address the children information is merged and rolled up to the master record.

How You Configure Automerge

Enabling Automerge involves several implementation steps that must be completed by an implementor using the following tasks from the Customer Data Management offering in the Setup and Maintenance work area:

- **Manage Customer Hub Profile Options**: Use this task from the Customer Hub functional area to perform the following implementation steps:
  - Set Auto Merge Threshold profile option (ZCH_AUTO_MERGE_THRESHOLD) to the required value. This profile option specifies the threshold for auto merge. Merge requests with lower scores need data steward review. An exact match is 100.
  - Review the Record Size Limit of Duplicate Set (ZCH_DI_MERGEREQ_REC_SIZE). This profile option determines the maximum number of records in the duplicate set that can be merged automatically. By default, the maximum number is set to 10 records.
  - Set the Survivorship Enabled profile option (ZCH_ENABLE_SURVIVORSHIP) to Yes. This profile option enables the survivorship rules to select the master record and retain the attributes during a merge operation.

- **Manage Survivorship Rules**: Use this task from the Customer Hub functional area to create Set Master survivorship rules to choose the master record for merge requests created from the duplicate identification batch and set the rule to active.

  If there are no active Set Master rules or if the Set Master rules didn't trigger, the merge request must be reviewed manually, even if the ZCH_AUTO_MERGE_THRESHOLD profile option is set, the score for all records is above the threshold value, and the number of records is below the record size limit.

  > **Note:** You can use the Set Attribute rules with Set Master rules to determine the Golden Master record. For automerge, Set Master rule is mandatory.

- **Manage Enterprise Data Quality Matching Configurations**: Use this task from the Data Quality Foundation functional area to perform the following implementation steps:
  - Create an active Match Configuration in Manage Enterprise Data Quality Matching Configurations task or use a predefined Match Configuration. Rebuild the keys if necessary.
  - Enable EDQ Real Time and Batch Basic Match Server in Manage Server Configurations task.

ORACLE

Run Automerge

This task involves the following two steps:

1. Create a duplicate identification batch and select Create Merge Request as the Automatic Processing Option.
2. Perform the task Run Request Dispatch Job to disposition the duplicate resolution sets.

The Dispatch Job processes any resolution request in Pending or Submitted status. You can run this job in two modes:

- On demand: **Run Request Dispatch Job** > **Submit**

- Per a specific schedule: Do the following steps to set up a recurring job:
    a. Click **Advanced** on the **Run Request Dispatch Job**task.
    b. Click **Schedule** tab and select the **Using a Schedule** radio button.
    c. Select the frequency you want and click **Submit**.

To see the list of dispatch jobs, and their statuses, navigate to **Scheduled Processes** under **Tools**.

Troubleshoot Automerge Issues

After you create your Duplicate Identification Batch, drill down into the completed batch to see the results. If duplicate sets have been found, and automerge is enabled, resolution requests are automatically submitted for merge.

If the resolution request wasn't submitted automatically, you can drill down to the duplicate set and compare the score for each record with the threshold in the ZCH_AUTO_MERGE_THRESHOLD profile option and the number of records with the limit in the ZCH_DI_MERGEREQ_REC_SIZE profile option. If all scores are above the threshold and the number of records is below the limit, verify that the following are true:

- Set Master rules are active and triggered to choose a master for the records in the duplicate set.

- ZCH_ENABLE_SURVIVORSHIP is set to yes.

Perform Automerge Using a SOAP Web Service

This topic describes how to automatically merge confirmed potential duplicates based on duplicate resolution requests using the `DuplicateResolutionRequestService` Web service.

Performing automerge involves the following tasks:

- Enabling automerge.

- Using the `DuplicateResolutionRequestService` Web Service to create an automatic merge request.

- Running automerge.

- Finding out the merge result.

Enable Automerge

1. Set the **User Merge Requests** profile option to **Allow Processing Without Approval**. When the User Merge Requests profile option is set to this value, user merge requests are processed immediately without requiring any approval from Data Steward.
2. Set the **Merge Request Enabled** (ZCA_MERGE_REQUEST) profile option to Yes.

3. Enable the **User Merge Requests** (ZCH_USER_MERGE_REQUESTS) profile option. This profile option controls the behavior after the merge request is entered. See the section Customer Hub Profile Options.

Use the Web Service to Create an Automatic Merge Request

1. To create an automatic merge request using the Web service, use the following URL:

   `https://servername/crmService/DuplicateResolutionRequestService?WSDL`

   For more information on DuplicateResolutionRequestService, see the Trading Community Real Time Data Quality section in the SOAP Web Services for CX Sales and Fusion Service guide.

2. You can use your proprietary, or a third party, SOAP Web services client to use the DuplicateResolutionRequestService Web service to create an automatic merge request. Enter the URL and run the createMergeRequest operation with the appropriate payload.

   For more information on Invoking SOAP Web Services, see the Invoking SOAP Web Services chapter in the SOAP Web Services for CX Sales and Fusion Service guide.

Run Automerge

Request your administrator to perform the task Run Request Dispatch Job to disposition the duplicate resolution sets. The Dispatch Job processes any resolution request in Pending or Submitted status. You can run this job in two modes:

On demand:

1. Navigate to the **Run Request Dispatch Job** task.
2. Click **Submit**.

Per a specific schedule:

1. Click **Advanced** on the **Run Request Dispatch Job** task.
2. Click **Schedule** tab and select the **Using a Schedule** radio button.
3. Select the frequency you want and click **Submit**.

Find Merge Result

1. Use the getMergeResult operation of the DuplicateResolutionRequestService Web service to find the merge result.
2. Use the operation with appropriate payload to view the result.

How You Manage Rejected Merge Requests

Merge requests are rejected either manually by a data steward or automatically by the application if the agreement rules are violated. You must login as a data steward to review or restore rejected merge requests in the Duplicate Resolution work area.

As a data steward, you can:

- Review rejected requests: You review the rejected requests by drilling down through their request ID to the **Review Merge Request** page to find out the rejection reasons.

ORACLE

- Refresh merge request details: You can refresh the merge request so that it has the latest details. For example, one of the records that must be merged could have been deleted after the merge request was created and before the data steward reviewed the merge request. Drill down the merge request, click **Actions > Reprocess Merge** on the Review Merge Request page to refresh the details of the merge request. Note that this option refreshes the details of the current merge request and does not trigger another merge request. Also, if this merge request is created from duplicate identification batch, it doesn't trigger duplicate identification process to recreate the merge request.

- Restore rejected requests: After reviewing rejected requests, you can correct the rejection reason and then restore rejected requests by clicking **Restore** on the **Review Merge Request** page. You can either select a different master record or remove certain records from the merge request and submit the merge request for reprocessing.

How you Consolidate Confirmed Duplicate Records

If you know for sure that two or more records are confirmed duplicates, you can create a request to consolidate them from the Create Resolution Request UI page.

Consolidating confirmed duplicate records involves the following tasks:

- Identify duplicate records
- Select duplicate resolution request type such as merge or link
- Create and submit the resolution request

Note: Groovy scripts on relationship objects don't run during merges. If they're critical, you can re-implement the scripts on the parent account or account.

Merge Confirmed Duplicate Records

You can merge confirmed duplicate records by creating and submitting a merge request from the Create Resolution Request UI page as follows.

Note: In this procedure you select the duplicates, which is quite unlike system merge in which the matching configuration selects duplicates.

1. Navigate to the **Duplicate Resolution** work area as follows: **Navigator > Customer Date Management > Duplicate Resolution.**
2. Click the Tasks menu and then click Create Resolution Request.
3. Provide the search criteria to search for the records that you want to merge. For example, select the Party Type as Person and type the Name as John.
4. Click Search.
5. From the search results, using the Shift or Control keys, select the records that you want to merge.
6. Click **Actions > Create Request**.
7. Provide a name for the request in the **Create Request: Select Type** dialog box.
8. Select the request type as **Merge (Request to physically merge records into one record.)**.

   Note: You can select the request type as Link, if you want to link the records.

ORACLE

9. Optionally, select a master record.

10. Click OK.

   You can see a message that the duplicate resolution request was submitted. The merge happens immediately if the data governance profile: User merge requests is set to Allow Processing Without Approval. If the profile is set to Process Subject to Approval, the merge is reviewed and processed later by a data steward.

11. Click Done.

Why You Link Duplicate Records

You use linking to associate two or more duplicate records while resolving duplicate records. This association only creates a link between the records and doesn't affect the records. You use this association, which has a unique ID, to refer to the member records of a link.

You can also create links for normal records even if they aren't duplicate records. In a link, you designate one of the records as the master and the others as duplicates. This helps users identify the master records for use in transactions.

During merge, duplicate records are combined into a single master record. However, some parties can't be merged because of functional or legal reasons. For example, for certain bank operations, you can't merge duplicate records from different business units or geographical regions. In these scenarios, we create a link between duplicate records instead of merging them.

A link doesn't change the party and the associated child entities such as addresses, contact points, and relationships. A link doesn't affect the transactional processing of the record. The link is a separate record in the data model, and has its own registry ID.

Related Topics
- Manage Links
- How do I create duplicate resolution requests?

Manage Links

You can manage links that are created either by duplicate resolution requests or by a data steward in the Manage Links page. Data stewards create links to resolve duplicate parties by manually linking them without a duplicate resolution request on the Create Link page.

You can access the managing links functionality by clicking on **Manage Links** on the Duplicate Resolution work area or by clicking **Linked Parties** on the Organization, Persons, or Groups work area.

Create Links

To create links:

1. Navigate to the **Manage Links** page as follows: **Navigator** > **Customer Data Management** > **Duplicate Resolution** > **Tasks**.
2. Select **Create** from the **Actions** menu.

ORACLE

3. In the **Create Link** page, enter the details about the link.

4. In the Link Members area, select and add two or more parties that you want to link by selecting **Add** from the **Actions** menu. You must select one of the parties as the master.

5. Click **Save and Close**.

Update Links

To update links:

1. Navigate to the **Manage Links** page as follows: **Navigator** > **Customer Data Management** > **Duplicate Resolution** > **Tasks**

2. Search for the link that you want to update. You can search by entering criteria such as link identification number, status, description, or the names of member record. You must select the **Master Party Type** to search for links.

3. Select the link you want to update from the Search Results region and click **Edit**.

   Optionally, you can also delete a link by selecting the link and clicking **Delete**.

4. In the **Edit Link** page, you can add link members, remove link members, and change the master record of the link.

   > **Note:** If you remove the members of a link, you can't restore them. To restore a link member, you must add it again to the link.

5. Click **Save and Close**.

Related Topics
- Why You Link Duplicate Records

How do you automatically link duplicate records?

You can create a duplicate identification batch and define subset rules to retrieve a subset of the records to identify duplicates within the batch or in the database.

The auto linking task involves the following two steps:

1. Create a duplicate identification batch and select Create link request for all records as the automatic processing option.

2. Perform the task Run Request Dispatch Job to disposition the duplicate resolution sets.

Create a duplicate identification batch and a subset rule

We first proceed to creating a duplicate identification batch. To do this, you can specify the criteria for retrieving a subset of records in the duplicate identification batch. This is known as defining Subset rules, which are also known as Batch Selection Criteria rules. The data quality engine identifies potential duplicates from this subset of records based on one of these rules:

- Match all keywords: Select this option to perform an AND operation.

- Match any keyword: Select this option to perform an OR operation.

ORACLE

Now that you have an overview of the task, let's first create a duplicate identification batch to identify duplicate organizations in the registry, and then create a rule to retrieve a subset of records where the organization was created after 6 June 2024. Note that you can use predefined or custom attributes.

1. Click **Navigator** > **Customer Data Management** > **Duplicate Identification**.
2. Click the **Create** button.

   The Create Duplicate Identification Batch page appears.
3. Enter a batch name and description.

   > **Note:** Another way is to copy an existing duplicate identification batch and quickly create a new batch from it. You can modify the details for this batch before submitting it.

4. Specify the Batch Match Mode such as **Against the Registry** or **Within the Batch**.

   In the Within the Batch Match mode, the duplicate identification is limited to the records in a batch that meet the subset rule conditions. In the Against the Registry Batch Match mode, the process aggregates the records that meet the subset rule conditions in a batch, and these records are matched against one another as well as against other records in the database.
5. Select the **Party Type** as Organization.
6. Select the **Automatic Processing Option** as **Create link request for all records**.
7. Provide the Batch Options. The batch options available depends upon the selected Automatic Processing Option. The following options are available when Create link request for all records is selected as the Automatic Processing Option:
   - Select an appropriate value for Cluster Key Level such as Typical.
   - Enter a value between 1 and 101, such as 70 for Match Threshold.
   - Enter a value between 1 and 101, such as 75 for Autolink Threshold.

     > **Note:** You need to keep in mind that the Autolink Threshold values that you provide in the Batch Options area override the values set in the Manage Customer Hub Profile Options page.

8. Click **Add** menu option or button under Duplicate Identification Batch: Selection Criteria.
9. Specify the Apply Rules option as **Match any keyword**.
10. Enter the following sample information in the Duplicate Identification Batch: Selection Criteria table:

    Duplicate Identification Batch: Selection Criteria

Object	Attribute	Operator	Value
Organization	Creation date	After	6 June 2024

11. Click **Save and Close** or **Schedule** per your requirement.

Run Request Dispatch Job

We will now proceed to running the request to disposition the duplicate resolution sets.

The dispatch job processes any resolution request in Pending or Submitted status. You can run this job in two modes:

- On demand: Submit request dispatch jobs directly from the **Duplicate Resolution** work area by selecting the batch and clicking the **Dispatch** button. This submits the job for immediate processing.
- Per a specific schedule: Do the following steps to set up a recurring job using the Run Request Dispatch Job. A setup user can access the Run Request Dispatch Job task in the Setup and Maintenance work area.

    a. Click the **Advanced** button on the Run Request Dispatch Job page.

    b. Click Schedule tab and select the **Using a Schedule** radio button.

    c. Select the frequency you want and click **Submit**.

To see the list of dispatch jobs, and their statuses, navigate to **Tools** > **Scheduled Processes**.

Create Duplicate Identification Batches and Define Subset Rules

You can create a duplicate identification batch and define subset rules to retrieve a subset of the records to identify duplicates within the batch or in the database.

Subset rules, also known as batch selection criteria rules, specify the criteria for retrieving a subset of records in the duplicate identification batch. The data quality engine identifies potential duplicates from this subset of records based on one of these rules:

- Match all keywords: Select this option to perform an AND operation.

- Match any keyword: Select this option to perform an OR operation.

Now that you have an overview of the task, let's first create a duplicate identification batch to identify duplicate persons in the registry, and then create a rule to retrieve a subset of records where the person name contains John and the address contains Redwood. Note that you can use predefined or custom attributes.

1. Navigate to the Duplicate Identification work area as follows: **Navigator** > **Customer Data Management** > **Duplicate Identification** .
2. Click **Create** menu option or button. The **Create Duplicate Identification Batch** page appears.
3. Enter a batch name and description.

   > **Note:** Another way is to copy an existing duplicate identification batch and quickly create a new batch from it. You can modify the details for this batch before submitting it.

4. Specify the **Batch Match Mode** such as **Against the Registry** or **Within the Batch**.

   In the **Within the Batch Match** mode, the duplicate identification is limited to the records in a batch that meet the subset rule conditions. In the **Against the Registry Batch Match** mode, the process aggregates the records that meet the subset rule conditions in a batch, and these records are matched against one another as well as against other records in the database.

5. Specify the **Party Type** as **Person**.
6. Specify the **Automatic Processing** option as **Create Merge Request** to merge the duplicate persons.
7. Provide the **Batch Options**. The batch options available depends upon the selected **Automatic Processing Option**. The following options are available when **Create Merge Request** is selected as the **Automatic Processing Option**:

   ○ Select an appropriate value for **Cluster Key Level** such as Typical.

   ○ Enter a value between 1 and 101, such as 70 for **Match Threshold**.

   ○ Enter a value between 1 and 101, such as 75 for **Automerge Threshold**.

   > **Note:** You need to keep in mind that the **Automerge Threshold** and **Autolink Threshold** values that you provide in the Batch Options area override the values set in the Manage Customer Hub Profile Options page.

- Select **Send Notifications** to notify the status of the duplicate identification batch to all interested parties such as initiator or submitter. For more information about these statuses, see How You Merge Duplicate Records in the Related Topics section. The default value for the Send Notifications field is set using the Merge Request Notifications option in the Manage Customer Data Management Options Setup and Maintenance task. You can't set the value of the Send Notifications field if the Merge Request Notifications option is set to disable all notifications. For more information about Merge Request Notifications, see Duplicate Resolution Simplified Profile Options topic in the Related Topics section.

8. Click **Add** menu option or button under **Duplicate Identification Batch: Selection Criteria**.
9. Specify the **Apply Rules** options as **Match any keyword**.
10. Enter the following sample information in the Duplicate Identification Batch: Selection Criteria table:

Object	Attribute	Operator	Value
Person	Name	Starts with	John
Address	Address Line 1	Contains	Redwood

11. Click **Save and Close** or **Schedule** per your requirement.

Related Topics

- Automerge
- How do I merge duplicate records?
- Customer Hub Profile Options

Run the Request Dispatch Job

The Dispatch Job processes duplicate resolution requests in Pending or Submitted status. Run this process to manage and monitor resolution requests. Running the Dispatch Process You can run this job in two modes:

- On demand. Complete the following steps to run the job on an ad-hoc basis:
  a. Open the Run Request Dispatch Job task from the implementation project. Alternatively, in the Setup and Maintenance work area, go to the following:
     - Offering: Customer Data Management
     - Functional Area: Customer Hub
     - Task: Run Request Dispatch Job
  b. Click Submit and make a note of the Process ID.

- Per a specific schedule. Do the following steps to set up a recurring job:
  a. Open the Run Request Dispatch Job task from the implementation project. Alternatively, in the Setup and Maintenance work area, go to the following:
     - Offering: Customer Data Management
     - Functional Area: Customer Hub
     - Task: Run Request Dispatch Job

ORACLE

    b. Click Advanced on the Run Request Dispatch Job task.

    c. Click Schedule tab and select the Using a Schedule radio button.

    d. Select the frequency and start date that you want and click Submit and make a note of the Process ID.

Review the Status of the Process

To see the list of dispatch jobs, and their statuses:

1. Go to the Tools section on the Navigator.
2. Click the Scheduled Processes link under Tools.
3. Use the Process ID that you noted earlier to search and view the status of the Schedule Duplicate Resolution Requests process.

Manage Links in Redwood Sales

How do you manually link duplicate records?

As a sales administrator, you can resolve duplicate accounts by manually linking the individual account records that you have determined as duplicates.

Here's how you manually link duplicate records:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Drill down to any account.
3. Search for Add Duplicate Account using the action bar.
4. Select a record from the picker on the Add Duplicate Account popup.

    Note: Filter the accounts list by using the ellipses (...) beside the picker.

5. Click **Add**.

View the list of duplicate accounts on the sales accounts page

An account can link to one or more duplicate accounts.

You can view the list of duplicate accounts by following these steps:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**
2. Drill down to any account.

    The main record and up to five duplicates are displayed.
3. Click **View All Duplicate Accounts** on the Duplicate Accounts panel.

All the duplicates of the selected account are displayed.

ORACLE

View the consolidated list of sales transactions on the Sales Accounts page

An account is associated with other transactions, such as opportunities, lead, asset, sales order, and so on.

Here's how you view the consolidated list of sales transactions of a sales accounts:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Search and select an account.

   All the transactions that belong to the selected account such as opportunities, lead, asset, sales order, and so on are displayed.
3. Drill down on the account to view details.

How do you remove a sales account from the duplicate set?

You may have wrongly added an account to a list of duplicate sets. You have the choice to remove it from the duplicate set.

Here's how you remove a sales account from a list of duplicate records:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Drill down to any account.
3. Click **View All Duplicate Accounts** on the Duplicate Accounts panel.
4. Scroll down to the required account.
5. Click the ellipses (...) under the Actions column and click **Remove**.

The selected account is removed from the list of duplicates.

How do you promote a different sales account to be the main account?

A particular account may be the main account in the list of duplicate accounts. Later, you may want to change the main account for some business reason.

Here's how you promote an account as the main account:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Drill down to any account.
3. Click **View All Duplicate Accounts** on the Duplicate Accounts panel.
4. Scroll down to the required account.
5. Click the ellipses (...) under the Actions column and click **Promote to Main**.

The selected account is now the main account.

How You Purge Duplicate Resolution Data

Legacy duplicate resolution data, such as resolution logs and legacy duplicate resolution batches and requests can clutter the duplicate resolution work area and affect the performance of the application.

Use the Purge Duplicate Resolution Data scheduled process to purge the duplicate resolution data, such as resolution logs and to delete duplicate resolution batches and requests. You can schedule this process from the Scheduled Processes work area. You can navigate to this work area as follows:**Navigator** > **Tools** > **Scheduled Processes** .

This scheduled process lets you purge duplicate resolution data based on status and date range. You can specify the status of the duplicate resolution requests to be purged, such as duplicate resolution requests in Completed, Error, Pending, New, or Rejected status. You can also specify a date range by specifying the start and an end date to select duplicate resolution requests to be purged. For more information, see: Submitting Scheduled Processes and Process Sets: Procedure

Related Topics

- Submit Scheduled Processes and Process Sets
- Process Sets
- View Status and Other Details for Scheduled Processes

FAQs for Duplicate Resolution

Can I undo a merge of records after a merge has been completed?

Merges can't be reversed after they're completed. The merge process can be configured to require a review and explicit submission before merge requests are processed to completion. Agreement rules can also be created to prevent the completion of merge requests based on configurable logic.

Can I include a member party in more than one link?

No. A member party can only participate in one link.

What happens if I include a record in a link?

Records participating in a link remain intact. Only an association is created between members of a link.

ORACLE

Can I create a link without a duplicate resolution request?

Yes. Use the managing link functionality to create a link directly. You can access the managing links functionality by clicking on Manage Links on the Duplicate Resolution Work Area.

Can I include members of different party types in a link?

No. A link must contain members of the same party type.

Can I override system mapping for all types of duplicate resolution request?

No. You can override system mapping only for duplicate resolution request of the type merge.

How can I access link information?

Use the managing links functionality to access link information. You can access the managing links functionality by clicking on Manage Links on the Duplicate Resolution Work Area or by clicking Linked Parties in the Party Center.

How can I cancel a batch process?

You can cancel a batch process in the Scheduled Processes Overview page. You can navigate to this page as follows: **Navigator** > **Tools** > **Scheduled Processes**. You must search for the batch process by its process ID, and then cancel the batch process request.

How can I make sure that a merge request contains the latest merge details?

Drill down the merge request, click **Actions** > **Reprocess Merge** on the Review Merge Request page to refresh the details of the merge request. You can refresh the details of a merge request only when the merge request is in error, rejected, or new statuses. Note that this option refreshes the details of the current merge request and doesn't trigger another merge request. Also, if this merge request is created from a duplicate identification batch, it doesn't trigger duplicate identification process to recreate the merge request.

Why am I unable to assign duplicate resolution requests?

You must be logged in as a Data Steward Manager to assign duplicate resolutions requests. Data Steward Managers assign requests in the Duplicate Resolution work area.

Why am I unable to reject duplicate resolution requests?

You must be logged in as a Data Steward or a Data Steward Manager to reject a request. Data Steward Managers can reject any request. Data Stewards can reject only those requests that are assigned to them.

Why am I unable to process a particular duplicate resolution request?

You can process duplicate resolution requests only if their status is New, and if the request type isn't link or merge. In short, you can only process generic duplicate resolution requests that are in New status.

ORACLE

10 Manage Hierarchy Information

Manage Hierarchy Information

How You Manage Hierarchies

A hierarchy captures the hierarchical relationships a party, such as a customer, has with other parties. This capability is frequently used to capture your customer's corporate hierarchy and to show how headquarters, branches, subsidiaries, and so on are related.

It can be used to capture the hierarchy of any entity, such as a prospect, supplier, or partner, and not just of customers.

Organizing customer data as hierarchies offers the following advantages:

- Enables you to understand and get a better view of your customer's organization.

- Enables you to better analyze customer-related data.

- Application modules using the hierarchy can use hierarchies to roll up transactions, and apply business rules.

You can leverage the hierarchy of your customers in many business processes. For example, the territory management functionality uses customer hierarchy information to define account dimensions. Financial applications use customer hierarchy information to process payments from one customer and apply them to another customer in the same hierarchy. The revenue roll-up report uses customer hierarchy information to roll up revenue numbers from opportunities across all customers in a hierarchy.

Oracle Cloud Applications have a common framework to manage various hierarchies called the Tree framework. The party hierarchy uses this common framework.

Here are the predefined hierarchy types:

- HZ_CUSTOMER_HIERARCHY: This predefined tree structure is used to maintain a hierarchy among sales prospects, sales accounts, legal entities, and customers.

- HZ_DNB_HIERARCHY: This predefined tree structure is used for maintaining the Dun & Bradstreet corporate hierarchy.

- HZ_PARTY_HIERARCHY: This predefined tree structure is used for maintaining party hierarchies such as the organization and person hierarchies.

You can create or modify hierarchies, using the Manage Hierarchies UI. You can access the Manage Hierarchies UI as follows:

Navigator > **Customer Data Management** > **Hierarchies**

Create Hierarchies

To create hierarchies:

1. Navigate to the **Manage Hierarchies** UI.
2. Click the **Create** option or button on the **Actions** menu. The Create Hierarchy: Enter Basic Information page appears.

ORACLE

3. Complete the mandatory fields. You can use the following sample data:

   o Hierarchy Name: Green Corp.

   o Hierarchy Type: Customer Hierarchy

   o Hierarchy Status: Active

   o Effective Start Date: Enter appropriate date and time.

4. Click **Next**. The Create Hierarchy: Add Parties page appears.
5. Click the **Add** option or button on the **Actions** menu. The Add Tree Node pop-up appears.
6. Select one of the following as the Tree Node Type:

   o Specific value

   o Values from referenced hierarchy

7. Click **Next**. The Create Hierarchy: Review page appears. Verify the hierarchy information and click **Back** to make any modifications.
8. Click **Finish** to complete creating the new hierarchy.

Edit Hierarchies

To edit hierarchies:

1. Navigate to the **Manage Hierarchies** UI.
2. Search and select the hierarchy you want to edit.
3. On the **Actions** menu, select one of the following options:

   o **Edit Hierarchy Version**: Lets you make the changes to the hierarchy available immediately.

   o **Create New Version**: Lets you make the changes to the hierarchy available at a later point in time.

4. Click **Add** or **Remove** option or button on the **Actions** menu as required to update the tree nodes.
5. Click **Save and Close** to complete editing the hierarchy.

Hierarchy Validation Rules

Hierarchy validation rules ensure that newly created or updated hierarchies are properly structured. These rules are run each time you create or modify hierarchies.

All hierarchy types, including the predefined hierarchy types: Party Hierarchy, Dun and Bradstreet Hierarchy, and Customer Hierarchy, enforce the following validation rules in active versions of customer hierarchies.

- A hierarchy can't contain a merged party.

- A hierarchy can contain parties with only certain party usages such as sales account, sales prospect, (internal) legal entity, external legal entity, and buying customer. A buying customer is also considered as an external legal entity.

- If a party is an external legal entity, its parent can only be an external legal entity.

- If a party is an (internal) legal entity, its parent can only be a (internal) legal entity.

- If a party isn't an external legal entity or (internal) legal entity, its parent can only be an eligible customer. For example, a sales prospect, sales account, external legal entity, (internal) legal entity or a buying customer.

- A party can be present in only one active tree across all trees in the customer hierarchy.

ORACLE

- If there are sales accounts organized in a customer hierarchy, all nodes in that hierarchy must be sales accounts. Sales accounts that appear within larger sales accounts are called in-between sales account nodes.

- A Named Sales Account can only have named sales accounts as ancestors.

Note: 'Named' is a sales account attribute stored in the Sales Account Profile entity.

These validation rules are enforced in the Hierarchy UI as much as possible while users select nodes to add to the hierarchy. Also, a background audit job implements these rules to ensure that all hierarchies that don't pass the validation are marked inactive.

Guidelines for Creating Hierarchies and Hierarchy Versions

While creating hierarchies, you have to decide whether you want to create a new hierarchy or use a new version of an existing hierarchy.

When to Create a New Hierarchy

You can create a new hierarchy when any of the following is true:

- You have a new customer, and a new hierarchy is required to represent the corporate structure of the new customer.

- Your existing customer has changed the structure of its organization radically. It is quicker and more efficient to create a new version rather than edit the existing one.

When to Create a New Hierarchy Version

You can create a new version of a hierarchy when any of the following is true:

- You have minor changes to make to an existing version of a hierarchy, such as adding a new customer, or removing or repositioning an existing customer in the hierarchy.

- You must make extensive changes to an active hierarchy, but want to render the changes active only when they're all incorporated into the hierarchy. Then, create a new version of the hierarchy and set it to become active after a reasonable window period. You can make all the required changes and have the new version ready for activation by the scheduled date.

Guidelines for Editing Hierarchies and Hierarchy Versions

While editing a hierarchy, you must decide whether you want to edit the existing version of the hierarchy or create a new one.

The changes you make to the existing version become active immediately, but the new versions of a hierarchy become active only on the date on which the hierarchy becomes active.

Edit Active Hierarchies

When you edit the existing version of a hierarchy, the changes are saved instantly and are available to users even as you edit them. However, you can't cancel any changes while editing existing hierarchy versions.

Two ways to deal with the changes while editing active hierarchies are:

- You can render hierarchies inactive before you edit them. Once you have made your changes, you can change their status to active again.

  > **Note:** The hierarchy isn't available to users while it's inactive.

- You can create a new hierarchy version and set it to be active the next day. Thus, while the existing version is active, you can make your changes to the new version and activate it the next day.

Edit Merged Hierarchies

The merge process consolidates the duplicate parties and updates the hierarchies to which these parties belong. If the updates to the hierarchies done by the merge process aren't as expected, then edit the updated hierarchies in the Manage Hierarchy Types task.

Related Topics
- How do I merge duplicate records?

FAQs for Manage Hierarchy Information

How can I create a new hierarchy type?

You can create a new hierarchy type using the Manage Tree Structures task. Select Trading Community Model as the application, an existing data source or new custom data source, and any labeling scheme you want. The next step is to, enter the other required details, such as the appropriate usage of the new hierarchy type. Note that tree structures don't support the Date Range, Allow Multiple Root Nodes, or the Reference Data Set options for the Restrict Tree Node List of Values Based on field. Tree structure only support fixed values. Finally, add the newly created hierarchy type under the Party Hierarchy Type lookup to include the new hierarchy type in the lookups for hierarchy types.

Can I create multiple versions of the same hierarchy?

Yes. You must ensure that the date on which the new version is active doesn't overlap with the date of any existing active version of the same hierarchy.

How can I respond to a merge completion notification if I don't have the privileges to edit hierarchies?

If you don't have the privileges to edit hierarchies, reassign the merge completion notification to a user with the appropriate privileges. So, if you're a sales person you can reassign a merge completion notification to the Sales Administrator.

Why is the hierarchy type I created not visible in the Manage Hierarchy UI?

When you create a hierarchy type, you must also update the list of hierarchy lookups. You can't use the new hierarchy type, unless you have updated the hierarchy lookup list.

You can update the list of hierarchy types using the Manage Hierarchy Lookups task. Select Party Hierarchy Type (PARTY_HIERARCHY_TYPE) lookup type to edit. Add the new hierarchy type to the Party Hierarchy Type lookup type. After updating the list of hierarchy type lookups and saving your changes, you can view the new hierarchy type under the list of hierarchy types.

Why is an active hierarchy version that has been saved recently sometimes set automatically to inactive?

The newly edited hierarchy is saved as an auto-commit process, even before you save and close it. The application triggers the tree flattening service and the audit job, when you save and close your changes. It doesn't wait for the job to complete, and notifies you to revisit the version after the audit job is complete, to check the version status of the hierarchy.

If the audit job identifies any errors at the time of hierarchy validation, then the status of the hierarchy is set to Inactive. However, the application doesn't notify you of this. You must revisit the hierarchy management interface and rectify issues in the previously saved version, if the status is inactive.

What's the table name and the column name where Hierarchy Name of customer or party hierarchies is stored?

You must refer to the TREE_NAME column of the FND_TREE_VL table for hierarchy names.

11 Information Protection

How You Work with Protected Information

In Oracle Cloud applications, your access to protected information depends on your job role. In case you don't have access to the information you need to work with, contact the IT security manager for the necessary privileges.

Securing and protecting customer information against data breaches, data theft, or unauthorized access is an increasing concern in any enterprise. To address this issue, Oracle Applications Cloud provides restricted access to information that's considered private to an individual, also known as Personally Identifiable Information (PII).

PII is any information that uniquely identifies an individual, such as personal phone number, personal email address, personal address, citizenship number, or Social Security Number (SSN). You can use PII data to uniquely identify, contact, or locate an individual, or you can use it with other sources to uniquely identify a person. For example, a SSN uniquely and directly identifies an individual, whereas a telephone area code identifies a set of people.

The attributes that are identified as PII are as follows:

- Home Address
- Home Phone Number
- Personal Email Address
- Taxpayer Identification Number (Social Security Number)

In Oracle Applications Cloud, access to the PII data is restricted to a set of job roles. If you need to work with PII data for business purposes, then contact the IT security manager for the necessary privileges.

Related Topics
- Export Data

ORACLE

ORACLE

12 View Audit Histories

Audit Reports

You can use the Audit Reports work area to view changes to the application data, such as the business objects that were created, updated, and deleted.

To view the history or to create a report, you must have a role with the View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) privilege assigned to it. For appropriate assignment of roles and privileges, check with your security administrator.

Audit Events

Transactional events in the application trigger the audit process based on the create, update, and delete operations. For events to trigger the audit process for the business objects, you must first enable the objects for auditing.

These are the events that trigger the audit process.

Transactional Event	When the Audit Activity is Triggered	Audit Report Content
Create	Whenever business object data is created and stored in the database	• Name of the created object • Name of the user who created the object • Time of creation
Update	Whenever the existing business object data is updated	• Both old and updated values of the object • Name of the user who updated the object • Time of updating
Delete	Whenever the existing business object data is removed from the database	• The last value that the object attributes contained • Name of the user who deleted the object

The event details are stored in the audit table. The attributes of the audited object data can be used in lookups and foreign keys to display values in the audit history. The application supports displaying the audited information according to the language settings configured.

For Oracle Fusion Middleware products, events such as failed sign-in attempts are used as triggers. In absence of an audit table, the information is stored in the sandbox and presented only in English.

> **Note:** This topic focuses on the create, update, and delete event types available in Fusion Applications. For details on events used in the Oracle Fusion Middleware products, refer to the Oracle Fusion Middleware documentation. See: *Introduction to Oracle Fusion Middleware Audit Framework*

ORACLE

Related Topics
- View Audit Reports

ORACLE