# Oracle® Cloud

# Import Customer Records from an FTP Server to Oracle ERP Cloud

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Oracle Cloud Import Customer Records from an FTP Server to Oracle ERP Cloud,

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Primary Author: Oracle Corporation

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# Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

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- Diversity and Inclusion
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## Documentation Accessibility

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## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at `http://cloud.oracle.com`.

## Conventions

The following text conventions are used in this document.

| Convention | Meaning |
| --- | --- |
| **boldface** | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| *italic* | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| `monospace` | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

# 1

# About This Recipe

Use this recipe to import customer records in bulk from an FTP server to Oracle ERP Cloud.

> **Note:**
>
> This recipe is available as **FTP Server — Oracle ERP Cloud | Import Customers** in the Integration Store. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

## Overview

This recipe imports customers from an FTP server location to Oracle ERP Cloud, according to a schedule specified in Oracle Integration.

To use the recipe, you must install the recipe and configure the connections and other resources within the recipe. Subsequently, you can activate and run the integration flow of the recipe manually or specify an execution schedule for it. When triggered, the integration flow reads the zip file containing Comma Separated Values (CSV) from a specified location in FTP and imports them as customer records to your Oracle ERP Cloud instance.

## System and Access Requirements

- Oracle Integration, Version 21.2.1.0.0 or higher
- Oracle ERP Cloud
- An account on Oracle ERP Cloud with the Administrator role
- An FTP server
- An FTP client to access the FTP server

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# Before You Install the Recipe

You must perform the following configuration tasks on your Oracle ERP Cloud instance and FTP server in order to successfully connect to these external systems using Oracle Integration and import customer records.

## Configure Oracle ERP Cloud

To access the Oracle ERP Cloud instance from Oracle Integration, you'll require a separate user account on Oracle ERP Cloud.

Also, generate the CSV zip file with customer records, and update ESS job definition fields.

Log in to your Oracle ERP Cloud instance as an **Administrator** and perform the following tasks.

1. Create a user account for Oracle Integration. Make a note of the user name and password you set for the account. You'll use the credentials of this user account to connect to Oracle ERP Cloud from Oracle Integration.

2. Assign the following roles to the user account. For more information on these roles, see Assign Required Roles to an Integration User.

   - `Integration Specialist`

   - `Oracle ERP Cloud-specific data access to the integration user`

3. Generate the CSV zip file.

   a. Navigate to **Receivables**, select **Billing**, and then select **Customers**.

   b. Click **Upload Customers from Spreadsheet**.

   c. In the Manage Customer Uploads page, click **Download Customer Spreadsheet Template**.

   d. Populate the template with all the customer details. Further, follow the instructions in the template to generate and download the CSV zip file.

4. Update the ESS job definition fields.

   a. Navigate to **My Enterprise** and select **Setup and Maintenance**.

   b. Choose **Financials** from the **Subject Area** drop-down menu. Further, click **Search**.

   c. In the search box, search for **Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications**, and select the same from the search results.

   d. On the resulting page, navigate to the **Manage Job Definitions tab**.

   e. Update the following ESS job definition fields.

| Field | Description | Information to Enter |
|---|---|---|
| **JobDefinitionName** | The name of the ESS job | `UploadCustomerEss` |

| Field | Description | Information to Enter |
|---|---|---|
| **JobPackageName** | The name of the package containing the ESS Job | `/oracle/apps/ess/financials/ receivables/customerSetup/ customerProfileClasses/` |

f. Update the parameters for each ESS job definition fields. Navigate to the **UploadCustomerESS: Parameters** tab to view and edit the parameters.

| Parameter | Description |
|---|---|
| **Batch Name** | Enter the name of the batch in which the customers must be created in bulk |
| **Data File** | Enter the name of the file being imported |
| **Batch ID** | Enter the unique ID of the batch. |
| **ATTRIBUTE4** | Specify the action. For example, `CREATE`. |

> **Note:**
>
> If you prefer to customize any of the above-mentioned values, ensure that you make necessary changes while updating the integration properties.

# Access Your FTP Server

Obtain an FTP server and ensure that you can access it.

1. Login to the server using your username and password through an FTP client; for example, FileZilla

2. Create a directory on the server to store the CSV zip file. Note down the path of the directory.

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# Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1.  On the Oracle Integration Home page, in the **Use a recipe/accelerator** section, click **View all**.

2.  Find the recipe you want to install, then click **Get**.

    A message confirms that the recipe was successfully installed, and the recipe card shows **In use**.

3.  Click **Configure**  on the recipe to configure its resources.

    The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.

## Configure the Oracle ERP Connection

Use the following steps to configure the **Oracle ERP Connection** connection.

1.  In the Connections section, click the connection name.

2.  In the Properties section, enter the Oracle ERP Cloud host name. For example: `https://your_domain_name.fa.DC.oraclecloud.com`.

3.  In the Security section, enter the following details:

| Field | Information to Enter |
|---|---|
| **Security Policy** | Select **Username Password Token**. |
| **User Name** | Enter the user name of the account created for Oracle Integration on Oracle ERP Cloud. See Configure Oracle ERP Cloud. |
| **Password** | Enter the password of the account created for Oracle Integration on Oracle ERP Cloud. |

4.  Click **Save**. If prompted, click **Save** again.

5.  Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

    A message confirms if your test is successful.

6.  To return to the project workspace, click **Go back** .

## Configure the Oracle FTP Connection

Use the following steps to configure the **Oracle FTP Connection** connection.

1.  If you are using an external FTP, find out the IP and port where the FTP server runs.

If you are using File Server, find its IP and port:

    **a.**   In the navigation pane, click **Settings**, then **File Server**, then **Settings**.

    **b.**   From the **General** section, copy the IP and port.

**2.**  In the Connections section, click the connection name.

**3.**  In the Properties section, enter the following details:

    **a.**   **FTP Server Host Address**: the IP for your external FTP file server or the IP you copied from the File Server settings. For instance, `server123.company_name.com`.

    **b.**   **FTP Server Port**: the port for your external FTP file server or the port you copied from the File Server settings. For instance, `21`.

    **c.**   **SFTP Connection**: specify the value as `No`.

**4.**  In the Security section, enter the following details:

| Field | Information to Enter |
| --- | --- |
| **Security Policy** | Select **FTP Server Access Policy**. |
| **User Name** | Enter the user name to connect to your FTP server. |
| **Password** | Enter the password to connect to your FTP server. |

**5.**  Click **Save**. If prompted, click **Save** again.

**6.**  Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

A message confirms if your test is successful.

**7.**  To return to the project workspace, click **Go back** .

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# Activate and Run the Recipe

After you've configured the connections, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project deployment selected, choose an appropriate tracing option, then click **Activate**.

   A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

2. Update property values for the integration flow. You can update the integration properties only after activating this flow.

   | Integration Property | Description |
   | --- | --- |
   | **ESSJobDefinitionName_Param** | Specify the name of the ESS job definition. |
   | **ESSJobPackageName_Param** | Specify the name of the package that contains the ESS job definition. |
   | **ESSjOB_Wait_Count_Param** | Specify the number of minutes the integration must wait for the ESS job to be completed. |
   | **ftpOutputDir** | Specify the path of the FTP directory where you can download the job run log files. |
   | **ftpInputDir** | Specify the path of the FTP directory where the integration must import the CSV zip file with customer records. See Access Your FTP Server. |

   For the procedure to update the integration properties, see Steps 7 and 8 in Override Design-Time Properties in an Integration.

3. Log in to your FTP server and upload the CSV zip file with the customer data in the corresponding directory. See Configure ERP Cloud.

4. Run the recipe.

   a. In the Integrations section of the project workspace, click **Actions** ... on the integration flow, then select **Run**.

   b. On the Configure and run page, click **Run**.

      You've now successfully submitted the integration for execution.

      > ✏️ **Note:**
      >
      > You can also schedule this integration to run at a date, time, and frequency of your choosing. See Define the Integration Schedule.

5. Monitor the running of the integration flow in Oracle Integration.

   a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.

   b. To manage errors in your project, see Manage Errors in a Project.

6. Log in to Oracle ERP Cloud and check for new customer records.

   a. Navigate to **Receivables**, select **Billing**, and then select **Manage Data Import**.

   b. Click the corresponding **Batch ID** to view details such as total number of records, records processed, and error records.

   You can also view individual customer records. To do so, navigate to **Billing Work Area**, select **Manage Customers**, and search for the specific customer record.

**Related Documentation**

- *Using the FTP Adapter with Oracle Integration 3*
- *Using the Oracle ERP Cloud Adapter with Oracle Integration 3*