Oracle
Sales Cloud
Understanding Import and Export Management

Release 13 (update 18B)
## Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td></td>
<td>i</td>
</tr>
<tr>
<td>1</td>
<td>About This Guide</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Audience and Scope</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Related Guides</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Functional Overview</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Import Documentation: Overview</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Import Process: Overview</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>File-Size Limits for Import: Explained</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Getting Started with Import</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Importing Data: Procedure</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Importing Attachments: Procedure</td>
<td>10</td>
</tr>
<tr>
<td>4</td>
<td>Managing Import Queues</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Import Queue: Explained</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Import Monitoring: Explained</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>Import Options: Explained</td>
<td>16</td>
</tr>
<tr>
<td>5</td>
<td>Managing Import Mappings</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>Import Field Mapping: Explained</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>Creating Import Mapping: Worked Example</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Managing Import Mappings</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>Import Mapping: Explained</td>
<td>22</td>
</tr>
<tr>
<td>6</td>
<td>Managing Import Objects</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Managing Import Objects: Explained</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Using Templates to Import Data: Procedure</td>
<td>26</td>
</tr>
<tr>
<td>7</td>
<td>Generating Diagnostic Logs for Data Import and Export</td>
<td>29</td>
</tr>
<tr>
<td></td>
<td>Generating the Diagnostics Log for Import: Procedure</td>
<td>29</td>
</tr>
</tbody>
</table>
# Importing Custom Objects

- Import of Custom Objects: Explained ................................................................. 31
- Inserting Custom Object: Worked Example ..................................................... 31
- Updating Custom Object: Worked Example .................................................... 34

# Importing Your Data

- Importing Your Account Data ........................................................................... 37
- Importing Your Activity Data ............................................................................. 39
- Importing Your Activity Assignee Data ............................................................ 72
- Importing Your Activity Contact Data ............................................................... 80
- Importing Your Activity Objective Data ............................................................. 89
- Importing Your Address Data ............................................................................ 97
- Importing Your Asset Data ................................................................................ 110
- Importing Your Asset Contact Data ................................................................. 114
- Importing Your Asset Team Member Data ......................................................... 117
- Importing Your Attachment Data ...................................................................... 120
- Importing Your Classification Data ................................................................... 125
- Importing Your Contact Data ............................................................................ 138
- Importing Your Opportunity Data ...................................................................... 141
- Importing Your Opportunity Competitor Data ................................................... 143
- Importing Your Opportunity Contact Data ....................................................... 146
- Importing Your Opportunity Lead Data ............................................................. 149
- Importing Your Opportunity Partner Data ......................................................... 152
- Importing Your Opportunity Revenue Data ....................................................... 154
- Importing Your Opportunity Source Data .......................................................... 157
- Importing Your Opportunity Team Member Data .............................................. 160
- Importing Your Relationship Data .................................................................... 163
- Importing Your Sales Lead Data ........................................................................ 172
- Importing Your Sales Lead Contact Data .......................................................... 178
- Importing Your Sales Lead Product Data .......................................................... 183
- Importing Your Sales Lead Resource Data ........................................................ 187

# Importing Data Using External Data Loader Client

- External Data Loader Client: Overview ............................................................. 193
- Downloading and Installing the External Data Loader Client .......................... 193
- Using the External Data Loader Client: Explained ............................................ 194
Preface

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

Using Oracle Applications

Using Applications Help

Use help icons 🔄 to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.
- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

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

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

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

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

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide is intended for anyone who is involved in importing and exporting business data in Oracle Sales Cloud. This guide assumes your company’s sales cloud service is up and running at a basic level, as described in the use case contained in the Oracle Sales Cloud, Getting Started with Your Implementation guide.

If you want to set up and work with the additional features of Oracle Sales Cloud, see Oracle Sales Cloud documentation on Oracle Help Center at https://docs.oracle.com.

Related Guides

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud File-Based Data Import for Oracle Sales Cloud</td>
<td>Directs you to reference information that you can use to create an importable source data file for the import of individual objects.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Extending Sales</td>
<td>Describes how to create and expand objects and configure the user interfaces and navigation menus.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Getting Started with Your Implementation</td>
<td>Describes your initial Oracle Sales Cloud service implementation procedures, based on a simple sales-force-automation use case.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Implementing Customer Data Management</td>
<td>Contains information to help implementors define the setup for managing customer information and the configuration for customer hub deployment.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Implementing Sales</td>
<td>Contains conceptual information and procedures required to implement components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Using Sales</td>
<td>Contains information about performing day-to-day tasks in Oracle Sales Cloud. Aimed at salespeople, sales managers, and other sales users.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Using Customer Data Management</td>
<td>Contains information about managing customer information and customer data quality.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2 Functional Overview

Import Documentation: Overview

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

The main sources of information for import are:

  - Explore the latest critical reference content supporting Oracle Sales Cloud.
  - Download PDF versions of guides, find links to reference materials and white papers, and search for specific topics.
  - Browse import data topics on the Administer tab that provide key import information.

- Oracle Sales Cloud Help
  - Click the Help icon in Oracle Sales Cloud, and browse general topics on import or search on individual import objects for examples, attributes, and other information.
  - Access an online version of Oracle Applications Help here: (https://fusionhelp.oracle.com/helpPortal/faces/AtkHelpPortalMain?_adf.ctrl-state=w9peupsov_5)


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

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

Import Process Flow
The following figure explains the various stages in the import process:

1. Evaluate your import data.
2. Identify the relevant import objects.
3. Map your data to the import objects.
4. Create an import activity.
5. Verify the import results.

Import Objects and Import Queue

**Import Objects** tab displays details about the target object and target attributes for each object. You can download the templates for each import object on the **Import Objects** tab by clicking the Download icon. When you create an import, you must specify a mapping of the fields in your file to the attributes of the import object. You can create the mapping while creating an import or separately using the **Import Objects** tab. The mapping is stored and managed as a separate object. You can create a new import mapping, upload a map, or manage an existing mapping using the **Import Objects** tab.

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

Application Composer and Custom Extensions

If you create additional attributes on an object in Application Composer, then these extensions are available for import and export once you generate the import and export artifacts in Application Composer.

File-Size Limits for Import: Explained

You perform an import by clicking **Tools > Import Management**. The maximum size of a data file that is imported using Import Management is 50,000 records for each file. The size of the file cannot exceed 250 MB. You can import files with more than 50,000 records or larger than 250 MB using the External Data Loader Client.
Chapter 2

Functional Overview
3 Getting Started with Import

Importing Data: Procedure

Using the Import Management option available from the Tools work area, you can import a wide range of business data from text files. Your import data can either create, update, or delete application records.

Use the steps outlined in this topic as a guide to importing data. The import options and other details differ by the type of data that you're importing. Before importing, you must understand how the data in your file maps to the attributes in Oracle Applications Cloud and what values are expected in the import file.

Note: Do not submit duplicate import jobs for the same import object because they create duplicate object records.

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

Importing Data from a File

You must be signed in as an administrator or setup user to perform the import. To import data:

1. In the Tools work area, click the Import Management icon.
2. On the Manage Imports page, click the Create Import Activity button. The Create Import Activity: Enter Import Options page appears.
3. Provide values for each field on the page as shown in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description of the value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the import.</td>
</tr>
<tr>
<td>Object</td>
<td>Object that you are importing.</td>
</tr>
</tbody>
</table>

If you cannot find your object in the drop-down list, then you can search and select the object 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 are importing is not listed then verify if you have the roles and privileges required to import the object.

<table>
<thead>
<tr>
<th>Attachment Object</th>
<th>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.</th>
</tr>
</thead>
</table>

For more details on importing attachments, review the topic Importing Attachments: Procedure in the related topics section.
Understanding Import and Export Management

Chapter 3
Getting Started with Import

<table>
<thead>
<tr>
<th>Field</th>
<th>Description of the value</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
<td>Browse and select a text file in CSV format.</td>
</tr>
</tbody>
</table>

**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 allows 50,000 records for each import job. Alternatively, you can use the Oracle Sales 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.

4. Optionally if you want to set additional import configurations, then 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 be available depending on the object that you’re importing:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Import Mode</strong></td>
<td>You can specify whether you want to create and update records or update them only.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Update and create records</strong> - a new record is created if a matching record is not found. This is the default option.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Create records</strong> - all the records in the file are new records which have to be created. If there are any existing matching records, then they are marked as errors.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Delete records</strong> - all the records in the file are deleted.</td>
</tr>
<tr>
<td><strong>Notification email</strong></td>
<td>The email of the individual who receives import processing notifications. The user submitting the import receives an email notification automatically. If you want to have more than one email recipient, separate the email addresses with a semicolon.</td>
</tr>
<tr>
<td><strong>Delimiter</strong></td>
<td>If your file doesn’t use a comma to separate values, then select the correct delimiter in the Delimiter drop-down list.</td>
</tr>
<tr>
<td><strong>Decimal Separator</strong></td>
<td>The decimal separator used in your import file.</td>
</tr>
<tr>
<td><strong>Date Format</strong></td>
<td>The format of the date fields in your file.</td>
</tr>
<tr>
<td><strong>Time Stamp Format</strong></td>
<td>The format of time fields in your file.</td>
</tr>
<tr>
<td><strong>File Encoding</strong></td>
<td>The format in which your source file has been encoded.</td>
</tr>
</tbody>
</table>

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

5. Click **Next**. The **Create Import Activity: Map Fields** page displays the first row of the data in 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 could not be mapped, then drag the target attribute onto the **Attribute Name** column under the **Source File** region.

6. You also have the option of selecting an appropriate mapping from the list of available mappings under the **Import Mapping** drop-down list. If you’re reusing an import mapping, then both the source and target columns are already populated. The **Source File** region represents your import file.
You can choose not to import a column in your file by leaving the **Attribute Name** field blank.

7. To validate the mapping of fields, click the **Validate Data** button. Validation process is triggered and displays any mapping errors on the **Mapping Validation** screen. Additionally, the first 10 rows of the file are validated.

8. Click **Next**. The **Create Import Activity: Review and Submit** page appears. On this 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.

9. Click the **Validate Data** button to run the validation. Validation errors, if any, are displayed on the **Mapping Validation** screen. The data in unmapped columns are not imported. If you get warnings about unmapped columns, then you can ignore these columns, and proceed to submit the import job.

10. **Submit** to activate the import.

### Monitoring the Import Status

To monitor the status of your import:

1. After you submit your import, you can view the status on the **Manage Imports** page that appears. It shows the following infolets:

<table>
<thead>
<tr>
<th>Infolet Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Imports</td>
<td>Shows the active, completed, and unsuccessful imports.</td>
</tr>
<tr>
<td>Active Imports</td>
<td>Shows all the imports that are currently running.</td>
</tr>
<tr>
<td>My Completed Imports</td>
<td>Shows the imports that have completed.</td>
</tr>
<tr>
<td>Unsuccessful</td>
<td>Shows the unsuccessful imports.</td>
</tr>
</tbody>
</table>

2. Click the **My Completed Imports** tab to view the imports that have completed.

3. Monitor the status of your import. A status of Completed or Completed with Errors indicates that the import has completed. Alternatively, you can wait for the notification email. For more details on monitoring the status of import, see the topic **Import Monitoring: Explained** referenced in the related links section.

4. Click the import name link to see additional information about the import. You can generate the diagnostics and log files from the **Action** menu. Download the log files by clicking the download icon under the **Import Attachments** section.

### Suppressing Business Events for the Objects

While bulk loading data into Oracle Sales Cloud, business events on standard objects are triggered in the Create and Update operations. This may have an adverse impact on performance. You can suppress this behavior using the following profile options:

- **ZCA_PUBLIC_BUSINESS_EVENTS**: You can use this profile option to suppress the business events for Accounts, Activity, Asset, Contacts, Deal Registration, Leads, and Opportunity objects. This profile option has the default value set to Y. Y indicates that all business events are enabled. When you set the profile option value to N, then the business events are suppressed until the same profile option is set to Y once again.

- **ZPM_ENABLE_PARTNER_EVENTS**: You can use this profile option to suppress the business events for Partner, Partner Contact, and Partner Notes objects. This profile option has the default value set to N. However, the profile option **ZCA_PUBLIC_BUSINESS_EVENTS** should be disabled to suppress events for any object. The profile option **ZCA_PUBLIC_BUSINESS_EVENTS** overrides **ZPM_ENABLE_PARTNER_EVENTS**.
Importing Attachments: Procedure

This topic describes how to import attachments using the Import Management feature. You can import attachments associated with any supported object.

The following objects support importing attachments:

- Activity
- Asset
- Lead
- Opportunity

The following are the file types supported for attachment files:

- CSV
- PDF
- PNG
- PPTX
- TIF
- TEXT
- XLSX
- XML

Importing Attachments

You can use the following steps to import attachments using Import Management:

1. Click Tools > Import Management.
2. On the Manage Imports page, click the Create Import Activity button. The Create Import Activity: Enter Import Options page appears.
3. In the Name field, enter a name for your import. In the Object drop-down list, and select Attachment.
4. In the Attachment Object drop-down list that appears, select the object associated with the attachment.
5. Browse and select the ZIP file that contains the attachment files and the source data file with the object records information for which you import the attachment.
6. The ZIP file must contain at least a file named Attachment.CSV, and optionally one or more attachment files. The Attachment. CSV file has the format shown in the following table:

<table>
<thead>
<tr>
<th>Pk1Value</th>
<th>ObjectPuid</th>
<th>FileName</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>300100111735265</td>
<td>Sales.txt</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

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. There is no limit on the number of attachments that can be imported in a single import job. However, the size of the attachment ZIP file cannot exceed 250 MB.

**Note:** A record in the CSV file cannot have values for both FileName and Url columns. You can pass either the Primary key or the PUID, but not both for an object record.

7. Click Next. On the Create Import Activity: Map Fields page, click the Apply button next to the Import Mapping drop-down list to map the source and target attributes automatically.

8. Click Next to navigate to the Review and Submit page.

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

Import Queue: Explained

This topic describes the different infolets displayed on the Manage Imports page of the Import Queues tab.

Import Queues

The following infolets are displayed on the Manage Imports page:

- All Imports: This infolet displays the count of active, completed, and unsuccessful imports submitted by all users. Clicking this infolet displays the imports created by all the users and in all possible statuses.
- Active Imports: This infolet displays the count of imports submitted by all users that are either in progress or in queued status. Clicking this infolet displays the active imports created by all the users.
- My Completed Imports: This infolet displays the count of imports submitted by the current user that are either successful or failed with warnings or errors. Clicking this infolet displays the completed imports created by the current user.
- Unsuccessful Imports: This infolet displays the count of unsuccessful imports submitted by all users. Clicking this infolet displays the unsuccessful imports created by all users.

Import Details

You can view more details about the imports on clicking the infolets. The following details about the import are displayed:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the import job.</td>
</tr>
<tr>
<td>File Name</td>
<td>The name of the source file.</td>
</tr>
<tr>
<td>Object</td>
<td>The object imported.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the import job. For more information about the statuses, see the topic Import Monitoring: Explained in the related topics section.</td>
</tr>
<tr>
<td>Start Time</td>
<td>The start date and time of the import.</td>
</tr>
<tr>
<td>End Time</td>
<td>The end date and time of the import.</td>
</tr>
<tr>
<td>Submitted By</td>
<td>The user who submitted the import.</td>
</tr>
</tbody>
</table>

You can filter the import 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.
Import Monitoring: Explained

This topic explains how to monitor all imports that are currently scheduled to run, have completed successfully, or have failed with errors. For each import, you can view the details pertaining to the underlying process and make the necessary updates for any failed records that you want to import again.

You can view the list of imports from the Manage Imports page of the Import Queue tab. To view the status of an import job:

1. You can filter the list of import jobs by selecting one of the icons at the top of the page: All Imports, Active Imports, My Completed Imports, Unsuccessful Imports.

2. To further filter the imports, select the filter criterion from the Search drop-down list. You can filter based on one of the following criteria:
   - Submitted By
   - End Time
   - Start Time
   - File Name
   - Name
   - Status
   - Object
   - Estimated Completion Time

Enter the filter value in the adjacent text box, and click the search icon. You can see the imports matching your filter criterion.

3. Select the import job that you want to monitor by clicking the link in the corresponding Name column. The Import Status page is displayed, that shows status of the most recently executed instance of the import definition. The Import Status page contains the following sections:
   - Status Bar
   - Details
   - Import Attachments

Status Bar

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

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

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

### Details

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

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

<table>
<thead>
<tr>
<th>File Processing Summary Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records Read From File</td>
<td>The number of records read from the source file.</td>
</tr>
<tr>
<td>Records Loaded Successfully</td>
<td>The number of import object records that were imported to the application destination tables.</td>
</tr>
<tr>
<td>Records With Errors Reported</td>
<td>The number of records that failed with errors when importing data from the interface tables to the destination tables. You can view the error details in the Exception and Error files attached to the process.</td>
</tr>
<tr>
<td>Records With Warnings</td>
<td>The number of records that were uploaded with warnings when importing data from the interface tables to the destination application tables.</td>
</tr>
</tbody>
</table>

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

### Import Attachments

The **Import Attachments** section displays the list of files associated with this import in tabular format. The **Actions** column lets you either download the file or view more details. These files include the source data file, map file, any log files that are generated and the process log file. The following files are downloadable from the **Import Attachments** section:

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

Related Topics
• Importing Data: Procedure
• Generating the Diagnostics Log for Import: Procedure

Import Options: Explained

This topic describes the options available while creating import activities. You can view the basic options under the Summary section of the Create Import Activity page. You can view the advanced options by expanding the Advanced Options section of the Create Import Activity page. For more details on creating an import, see topic Importing Data from a File: Procedure referenced in the related links section.

Standard Options
Following are the standard options visible by default:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the import job.</td>
</tr>
<tr>
<td>Object</td>
<td>The object that is imported. You must select the parent or child object from the drop-down list.</td>
</tr>
<tr>
<td>File Name</td>
<td>The name of the source file that contains import records.</td>
</tr>
</tbody>
</table>

Advanced Options
The following options are used to identify the formatting of source file data so that the data can be correctly interpreted by the import process.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delimiter</td>
<td>The character used to delimit the individual values in the source file. Possible values are comma, semi-colon, and tab.</td>
<td>Comma</td>
</tr>
<tr>
<td>Decimal Separator</td>
<td>The format of the fractional portion of numeric values in columns mapped to attributes with a decimal attribute type. Possible values are comma, and period.</td>
<td>Period</td>
</tr>
<tr>
<td>Date Format</td>
<td>The format for values in columns mapped to attributes with a date attribute type. Possible values are US-MM/DD/YYYY, EU-YYYY/MM/DD, and UK/Canada-DD/MM/YYYY</td>
<td>US-MM/DD/YYYY</td>
</tr>
</tbody>
</table>
### Managing Import Queues

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Stamp Format</strong></td>
<td>The format for values in columns mapped to attributes with a time stamp attribute type. Possible values are US-MM/DD/YYYY hh:mm:ss PM, Canada-DD/MM/YYYY hh:mm:ss PM, EU-YYYY/MM/DD 24:mm:ss and UK-DD/MM/YYYY 24:mm:ss.</td>
<td>US-MM/DD/YYYY hh:mm:ss PM</td>
</tr>
<tr>
<td><strong>File Encoding</strong></td>
<td>The overall encoding of the characters within the file. Possible values are Unicode - UTF - 8, Unicode - UTF - 16, Unicode - UTF - 16BE Mac Linux, Unicode - UTF - 16LE MS Windows, Chinese Simplified - GB CP936, Chinese Traditional - CP950, Eastern European - Win CP1250, Greek - MS Windows CP1253, Japanese - Shift-JIS CP932, and Western European - Win CP1252.</td>
<td>Unicode - UTF - 8</td>
</tr>
</tbody>
</table>

The following options are used to define how the import processes the source file data and the schedule frequency of import.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Import Mode</strong></td>
<td>You have the option of specifying whether you want to create and update records, update only, or delete records.</td>
<td>Update and create records</td>
</tr>
<tr>
<td><strong>Notification email</strong></td>
<td>The user submitting the import automatically receives an email notification. This field is used to specify any additional recipients. You can specify a mailing list address so that a large number of recipients can be notified without having to paste the list of users into this field.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Create Schedule</strong></td>
<td>You can schedule the import to either run immediately or at a future date. If you select the Future option, then you must provide a start date and time by clicking the calendar icon in the Start Time text box.</td>
<td>Immediate</td>
</tr>
</tbody>
</table>

**Related Topics**
- Importing Data from a File: Procedure
5 Managing Import Mappings

Import Field Mapping: Explained

After entering your import options, you must map fields in the source file to the corresponding target attributes. This topic explains the steps in the process:

- Automatic Mapping
- Mapping the Fields
- Saving the Import Mapping

Automatic Mapping

The automatic mapping feature of the application tries to map the source file columns to the target attribute columns. The application automatically saves the mapping created under the name Automatic Mapping and displays it in the Importing Mapping drop-down list.

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

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

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

Mapping the Fields

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

The following table outlines the source columns.

<table>
<thead>
<tr>
<th>Source Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Header</td>
<td>Represents the column header for the text files.</td>
</tr>
<tr>
<td>Example Value</td>
<td>Values are derived from the first source file saved with the predefined mapping. If you didn’t select a predefined mapping, then the example values are taken from the first data row in the source file selected in the first step of the Import Activity definition.</td>
</tr>
<tr>
<td>Attribute Name</td>
<td>Represents the target attribute that is to be mapped to the source column.</td>
</tr>
</tbody>
</table>
The following table outlines the target columns.

<table>
<thead>
<tr>
<th>Target Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Attribute</td>
<td>The attribute name that represents the corresponding table column for the object.</td>
</tr>
<tr>
<td>Required</td>
<td>Indicates whether the target attribute is a required or a user key. Required indicates that the key is mandatory while creating a new record. User key indicates that the key is mandatory while updating an existing record.</td>
</tr>
</tbody>
</table>

Saving the Import Mapping

Automatic mapping is used to map the source file attributes to target attributes as described in the previous section. If you want to map additional attributes or override existing mappings, then click the Save As button to provide a name for your custom map. The name of a mapping file must be unique within the scope of an object. After saving a mapping, the value in the Import Mapping drop-down list is updated to the name of the saved mapping.

Related Topics

- Importing Data: Procedure

Creating Import Mapping: Worked Example

This example demonstrates how to create an import mapping. You can create an import mapping by:

- Creating an import mapping manually.
- Generating the import map from the sample source file.

Manual Map Creation

1. Sign in as a setup or administrator user.
2. In the Tools work area, click the Import Management icon.
3. Click the Import Objects tab, to navigate to the Import Object Details section.
4. Click the Account link under the Display Name column to create mapping for the Account object.
5. On the Manage Mapping page, click the Create Import Mapping button.
6. On the Edit Import Mapping page, enter the name of the mapping, and provide a description for the mapping. The Target Attributes section displays the attributes of the Account object that should map to the source file columns. The Required column indicates whether the attribute is required or a user key.
7. In the Source File section, click the Add Column button. This button inserts a column to the mapping file.
8. To create the mapping column for the Organization Name attribute, drag and drop the Organization Name attribute from Target Attributes section to the Target Attribute column under the Source File section.
9. Provide the column header name, such as organization name. Provide an example value, such as Green Corp. Follow steps 7 to 9 to add any additional mapping columns.
10. Click the Save and Close button to save the mapping.
Generating an Import Map from a Sample Source File

1. Sign in as a setup or administrator user.
2. In the Tools work area, click the Import Management icon.
3. Click the Import Objects tab, to navigate to the Import Object Details section.
4. Click the Account link under the Display Name column to create mapping for the Account object.
5. On the Manage Mapping page, click the Create Import Mapping button.
6. On the Edit Import Mapping page, enter name of the mapping, select the object such as Account, and provide a description for the mapping. The Target Attributes section displays the attributes of the Account object that should map to the source file columns. The Required column indicates whether the attribute is required or a user key.
7. From the Actions menu under Source File section, click Select Source File.
8. In the Source File dialog box, browse and select the comma-separated source file that should be the source for your mapping file. This creates the mapping file based on the column header and example values in the source file.
9. Click Save and Close button to go to the Manage Mapping page. This page displays the newly created mapping file.

Managing Import Mappings

This topic describes how to manage import mappings. Import mappings let you map the data in your import file to the Oracle applications database. You can copy and modify existing mappings to suit your business requirements. You can also download an existing import mapping from one Oracle application instance and upload the mapping into another Oracle application instance.

Copying and Modifying a Mapping

You can copy and modify existing mappings to suit your business requirements. To copy or modify a mapping:

1. In the Tools work area, click the Import Management icon.
2. Click the Import Objects tab.
3. In the Import Object Details section, click the Object name for which the template is required.
4. Click the link under the Mapping Number column for the required mapping.
5. On the Edit Import Mapping page, select the Copy Import Mapping option from the Actions menu.
6. You can drag the target object attributes to the Target Attribute field under the Source File section on the left.
7. You can also add attributes to the object by clicking the Add Column button.
8. After editing the mapping, provide a new name in the Name text box and click Save to save the mapping.
9. You can delete a mapping by selecting the Delete Import Mapping option from the Actions menu.

Downloading the Map File

You can download an existing import mapping from one Oracle application instance and upload the mapping into another Oracle application instance. To download a map file:

1. In the Tools work area, click the Import Management icon.
2. Click the Import Objects tab.
3. In the Import Object Details section, click the Object name for which the template is required.
4. Click the link under the Mapping Number column for the required mapping.
5. On the Edit Import Mapping page, select the Download Map option from the Actions menu.
6. You can save the map file to a location on your hard drive.

Uploading the Map File
You can upload a map file that you downloaded from one instance, as described in the previous section, to another instance as follows:

1. In the Tools work area, click the Import Management icon.
2. Click the Import Objects tab.
3. In the Import Object Details section, click the Object name for which the template is required.
4. On the Manage Mapping page, click the Upload Map button. Browse and select a map file. Click OK.
5. On the Edit Import Mapping page, provide a name in the Name text box and click Save to save the mapping.

Note: If you upload a map file, then you can reuse the mapping while creating an import. You can select the mapping from Import Mapping drop-down list on the Create Import Activity: Map Fields page. You can use the Download and Upload Map File features to move custom maps between Sales Cloud instances. It is not recommended to manually edit downloaded map files.

Downloading Import Templates from an Import Mapping
You can download import templates from an import mapping and use them to import your data. To download a template:

1. In the Tools work area, click the Import Management icon.
2. Click the Import Objects tab.
3. In the Import Object Details section, click the Object name for which the template is required.
4. On the Manage Mapping page, click the link under the Mapping Number column for the required mapping.
5. On the Edit Import Mapping page, select Download Template option from the Actions menu.

Import Mapping: Explained
Import mapping enables you to predefine a mapping between the columns provided in a source file and the attributes pertaining to the objects being imported. Once you create a mapping, it can be reused in the import definition.

In the Tools work area, click the Import Management icon. Click the Import Objects tab to navigate to the Import Object Details section. Click the Object link to navigate to the Manage Mapping page. You can create a mapping by clicking the Create Import Mapping button. For more details about creating a mapping, refer to the topic Creating Import Mapping: Worked Example referenced in the Related Topics section. Click the mapping you created to navigate to the Edit Import Mapping page where you can edit your mapping.

This page contains the following sections:

- Import Mapping Options
- Source File Options
- Target Options

Import Mapping Options
The following attributes pertain to the import mapping.
Attribute | Description
---|---
Object | The business object to be imported.
Name | The name that identifies the mapping in the Import Mapping and Import Activity UIs.
Mapping Number | The unique number used to identify the import mapping.

Source File Options
The following table describes the details related to columns provided in the source file:

<table>
<thead>
<tr>
<th>Source Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Header</td>
<td>The column name expected in the source file.</td>
</tr>
<tr>
<td>Example Value</td>
<td>Values from the first data row in the source file.</td>
</tr>
<tr>
<td>Attribute Display Name</td>
<td>Represents the target attribute that is to be mapped to the source column.</td>
</tr>
<tr>
<td>Select Source File</td>
<td>Use this button from the <strong>Action</strong> menu to import mapping from a source file.</td>
</tr>
<tr>
<td>Delete Column</td>
<td>Use this button from the <strong>Action</strong> menu to delete a column from the mapping file.</td>
</tr>
</tbody>
</table>

Target Attributes
The following table describes the details related to corresponding attributes in the target application table:

<table>
<thead>
<tr>
<th>Target Attributes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Attribute</td>
<td>The attribute name that represents the corresponding table column for the object.</td>
</tr>
<tr>
<td>Required</td>
<td>Indicates whether the target attribute is a user key or a required key.</td>
</tr>
<tr>
<td>Description</td>
<td>Provides a brief description of the attribute.</td>
</tr>
</tbody>
</table>

**Related Topics**
- Importing Data: Procedure
Managing Import Objects: Explained

This topic describes how to manage the various objects available for import. It describes the following sections:

- Import Object Details
- Target Attributes

Import Object Details

Click **Tools > Import Management**. Click the **Import Objects** tab to navigate to the **Import Object Details** page. You can see the following details about each importable object.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>The importable object.</td>
</tr>
<tr>
<td>Language Independent Code</td>
<td>The internal name of the object.</td>
</tr>
<tr>
<td>User Key</td>
<td>Clicking this icon shows the target attribute or the group of attributes which are used to uniquely identify a record.</td>
</tr>
<tr>
<td>Required Attributes</td>
<td>Clicking this icon shows the target attribute or the group of attributes for which a value is required to be provided. These fields are required when you're trying to insert a record. These fields can't be set to NULL when updating a record.</td>
</tr>
<tr>
<td>Description</td>
<td>Provides a brief description of the object.</td>
</tr>
<tr>
<td>Download</td>
<td>Provides link to download the template files for each object along with its child objects.</td>
</tr>
</tbody>
</table>

Target Attributes

The **Target Attributes** section displays the details about the target attributes of the selected object as shown in the following table.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>The display name of the target attribute.</td>
</tr>
<tr>
<td>Attribute Name</td>
<td>The name of the attribute.</td>
</tr>
<tr>
<td>Type</td>
<td>The data type of the target attribute.</td>
</tr>
</tbody>
</table>
Using Templates to Import Data: Procedure

This topic describes how to download an import template for an object, such as account, and use it as a source file to import data. You can use the import object templates to simplify creating an import job. Templates let you use the automapping feature of the import framework. For automapping, the column headers in the source file must match the names of the columns (attributes) of the objects imported. The column headers shown in the first row of the downloadable templates are the same as the column names of the corresponding objects in Sales Cloud. Therefore, building source files from the templates allows the automapping process.

For example, if your source file has a column with a header called "URL" when you import into the Account object, this column is automatically mapped to the Account URL column in Sales Cloud. However if your source file’s column header is “Website”, then automapping fails and you should create the mapping manually.

Populating the Import Templates

The downloaded ZIP file for an import object contains the CSV template files for both the parent as well as all the child objects related to that import object. You can update the downloaded template to use it for importing data using the following steps:

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

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

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

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

Related Topics

- Importing Data: Procedure
7 Generating Diagnostic Logs for Data Import and Export

Generating the Diagnostics Log for Import: Procedure

In case of any issues faced during the import, you must provide the diagnostic log files to technical support to help them resolve the issue. You can generate the diagnostic logs by clicking the Generate button. You can then attach the log files (in ZIP format) to the Service Request (SR). This helps the technical support to resolve the issues.

To generate the diagnostic logs for an import:

1. Click Tools > Import Management.
2. On the Manage Imports page, click the Name link for your import that has failed.
3. On the Import Status page, click the Generate Diagnostics button in the Action menu to generate the diagnostics files.
4. After the log files are generated, the Import Attachments section is populated with the link to download the generated files. You can download the files to a location on your desktop by clicking the Download icon under the Actions column of the Import Attachments table. Clicking the Details icon displays more details about the files such as file name, title, and description.
8 Importing Custom Objects

Import of Custom Objects: Explained

Object artifacts are required to register your extensions and make them available for importing. Before you can import data for custom objects, you must generate the object artifacts using Application Composer. The new custom objects do not appear in the list of available objects until you generate the object artifacts. This topic describes how to generate the object artifacts, and subsequently import custom objects.

Enabling Import for Custom Objects

The changes you make using Application Composer do not automatically create the artifacts required by the import processes. Accordingly, after completing your object model configurations, you must generate the required artifacts to register your configurations and make them available for importing.

Note: You cannot generate import artifacts within a sandbox. You can generate them after publishing the sandbox changes.

To enable the import of custom object data:

1. Confirm that you're not in a sandbox.
2. In Application Composer, click the Import and Export link in the Common Setup pane, or in the local area of the main Overview page.
3. On the Import and Export page, click the Generate button.

After you generate the required artifacts you can schedule your import by clicking Import Management from the Tools menu. You must import the custom child objects after importing the parent object.

Using the RecordName Attribute

When defining your custom object in Application Composer, you can mark the RecordName attribute as unique. If marked as unique and the RecordName value in the source file record is unique (no matching record exists in the CSV file or database table), then the import activity is successful for both insert and update operations. If the RecordName is marked as unique and the RecordName value exists in the database, then the existing record is updated. If the RecordName for a custom object is not marked as unique, then you can insert a duplicate record but cannot update based on the RecordName field.

Inserting Custom Object: Worked Example

This example explains how to insert custom object data into Oracle Sales Cloud.
Creating the Parent and Child Custom Objects

To create parent and child custom objects:

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

Inserting Data for Parent Custom Object Only

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

1. Create the CSV file using the following table:

<table>
<thead>
<tr>
<th>RecordName</th>
<th>OrderName</th>
<th>OrderCount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomOrder1</td>
<td>01-A1-inventory</td>
<td>2000</td>
</tr>
<tr>
<td>CustomOrder2</td>
<td>02-B3-inventory</td>
<td>3000</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>RecordName</td>
<td>CustomOrder1</td>
<td>CustomOrder Name</td>
</tr>
<tr>
<td>OrderName</td>
<td>01-A1-inventory</td>
<td>OrderName</td>
</tr>
<tr>
<td>OrderCount</td>
<td>2000</td>
<td>OrderCount</td>
</tr>
</tbody>
</table>
6. Review and activate the import activity.

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

### Inserting Multiple Child Records for an Existing Parent Record

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

1. Create the CSV file using the following table.

<table>
<thead>
<tr>
<th>RecordName</th>
<th>CustomOrder_Id_c</th>
<th>ItemName</th>
<th>ItemCount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomOrder1_Item1</td>
<td>300100035820958</td>
<td>Electronics</td>
<td>150</td>
</tr>
<tr>
<td>CustomOrder1_Item2</td>
<td>300100035820958</td>
<td>Stationery</td>
<td>200</td>
</tr>
<tr>
<td>CustomOrder1_Item3</td>
<td>300100035820958</td>
<td>Computer Accessories</td>
<td>500</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>RecordName</td>
<td>CustomOrder1_Item1</td>
<td>CustomOrderItem Name</td>
</tr>
<tr>
<td>CustomOrder_Id_c</td>
<td>300100035820958</td>
<td>CustomOrder_Id_c</td>
</tr>
<tr>
<td>ItemName</td>
<td>Electronics</td>
<td>ItemName</td>
</tr>
<tr>
<td>ItemCount</td>
<td>150</td>
<td>ItemCount</td>
</tr>
</tbody>
</table>

6. Review and activate the import activity.

### Inserting Multiple Child Records with Different Parent Records

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

1. Create the CSV file using the following table.

<table>
<thead>
<tr>
<th>RecordName</th>
<th>CustomOrder_Id_c</th>
<th>ItemName</th>
<th>ItemCount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CustomOrder1_Item1</td>
<td>300100035820958</td>
<td>Switches</td>
<td>50</td>
</tr>
<tr>
<td>CustomOrder1_Item2</td>
<td>300100035820958</td>
<td>Sockets</td>
<td>100</td>
</tr>
<tr>
<td>CustomOrder1_Item3</td>
<td>300100035820958</td>
<td>Regulators</td>
<td>50</td>
</tr>
<tr>
<td>CustomOrder2_Item1</td>
<td>300100035820960</td>
<td>Pencils</td>
<td>50</td>
</tr>
<tr>
<td>CustomOrder2_Item2</td>
<td>300100035820960</td>
<td>Sharpener</td>
<td>100</td>
</tr>
<tr>
<td>CustomOrder2_Item3</td>
<td>300100035820960</td>
<td>Eraser</td>
<td>50</td>
</tr>
</tbody>
</table>

2. Navigate to the Import Management work area from the Tools menu.

3. On the Manage Imports tab, click the Create Import Activity button to create an import activity InsertCustomObject. For more information about creating an import, see the topic Importing Data: Procedure mentioned in Related Links section at the end of this topic.

4. On the Create Import Activity page, provide the file name InsertCustomObject and select the custom object CustomOrderItem from the Object drop-down list. Browse the CSV file that you created in step 1. Click Next.

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

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>RecordName</td>
<td>CustomOrder1_Item1</td>
<td>CustomOrderItem Name</td>
</tr>
<tr>
<td>CustomOrder_Id_c</td>
<td>300100035820958</td>
<td>CustomOrder_Id_c</td>
</tr>
<tr>
<td>ItemName</td>
<td>Electronics</td>
<td>ItemName</td>
</tr>
<tr>
<td>ItemCount</td>
<td>150</td>
<td>ItemCount</td>
</tr>
</tbody>
</table>

6. Review and activate the import activity.

Related Topics

- Importing Data: Procedure

Updating Custom Object: Worked Example

This worked example explains how to update custom object data into Oracle Sales Cloud.
Updating Only Parent Records

To create the parent and child custom objects, review the topic Inserting Custom Object: Worked Example referenced in the Related Links section. Perform the following steps to update only the parent records:

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

<table>
<thead>
<tr>
<th>ID</th>
<th>RecordName</th>
<th>OrderName</th>
<th>OrderCount</th>
</tr>
</thead>
<tbody>
<tr>
<td>300100035820958</td>
<td>CustomOrder1</td>
<td>01-A1-inventory</td>
<td>90000</td>
</tr>
<tr>
<td>300100035820960</td>
<td>CustomOrder2</td>
<td>01-A1-inventory</td>
<td>70000</td>
</tr>
</tbody>
</table>

2. Navigate to the Import Management work area from the Tools menu.

3. On the Manage Imports tab, click the Create Import Activity button to create an import activity UpdateCustomObject. For more information about creating an import, see the topic Importing Data: Procedure mentioned in Related Links section at the end of this topic.

4. On the Create Import Activity page, provide the file name UpdateCustomObject and select the custom object CustomOrder from the Object drop-down list. Browse the CSV file that you created in step 1. Click Next.

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

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>300100035820958</td>
<td>Record ID</td>
</tr>
<tr>
<td>RecordName</td>
<td>CustomOrder1</td>
<td>CustomOrder Name</td>
</tr>
<tr>
<td>OrderName</td>
<td>01-A1-inventory</td>
<td>OrderName</td>
</tr>
<tr>
<td>OrderCount</td>
<td>90000</td>
<td>OrderCount</td>
</tr>
</tbody>
</table>

6. Review and activate the import activity.

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

Updating Only Child Records

To create the parent and child custom objects, review the topic Inserting Custom Object: Worked Example referenced in the Related Links section. Perform the following steps to update only the child records.

1. Create the CSV file using the following table.
### Importing Custom Objects

<table>
<thead>
<tr>
<th>ID</th>
<th>RecordName</th>
<th>ItemName</th>
<th>ItemCount</th>
</tr>
</thead>
<tbody>
<tr>
<td>300100035821118</td>
<td>CustomOrder1__Item1</td>
<td>Switches</td>
<td>2500</td>
</tr>
<tr>
<td>300100035821120</td>
<td>CustomOrder1__Item2</td>
<td>Sockets</td>
<td>1000</td>
</tr>
</tbody>
</table>

2. Navigate to the **Import Management** work area from the **Tools** menu.
3. On the Manage Imports tab, click the **Create Import Activity** button to create an import activity UpdateCustomObject.
4. On the Create Import Activity page, provide the file name UpdateCustomObject and select the custom object CustomOrderItem from the **Object** drop-down list. Browse the CSV file that you created in step 1. Click **Next**.
5. On the mapping page, map the attributes as shown in the following table.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Attribute Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>300100035821118</td>
<td>Record ID</td>
</tr>
<tr>
<td>RecordName</td>
<td>CustomOrder1__Item1</td>
<td>CustomOrder Name</td>
</tr>
<tr>
<td>ItemName</td>
<td>Switches</td>
<td>ItemName</td>
</tr>
<tr>
<td>ItemCount</td>
<td>2500</td>
<td>ItemCount</td>
</tr>
</tbody>
</table>

6. Review and activate the import activity.

**Related Topics**

- Importing Data: Procedure
9 Importing Your Data

Importing Your Account Data

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

The account object has the following child objects:

- Address
- Classification
- Relationship
- Sales Team Member

To import account 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.

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

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

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the address of an account, ensure that its parent account exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is using the public unique identifier: If you're creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the
business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Account object, the attribute is PartyNumber. It appears as Party Number in the UI.

### Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Account Record</th>
<th>Updating an Existing Account Record</th>
<th>Deleting an Existing Account Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyNumber</td>
<td>The public unique identifier of the party.</td>
<td>Identify the party ID and party number value by exporting the Party object.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OrganizationName</td>
<td>The name of the party of the Organization party type.</td>
<td>Identify the organization name of the resource by navigating to the Resource Directory.</td>
<td>Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OwnerPartyNumber</td>
<td>The public unique identifier of the resource who owns and manages the sales account.</td>
<td>No prerequisite tasks.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OwnerEmailAddress</td>
<td>The email address of the resource who owns and manages the sales account.</td>
<td>No prerequisite tasks.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>

You can view the Account object along with all its child objects and attributes in the Manage Import Objects page of the Import Objects tab. You can find attribute information like type, length, description, and so on, on this page.
Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Account object row and click the Download icon.
4. Save the Account_Templates ZIP file to a location on your desktop.

You must edit the Account.CSV file and provide valid values for the required attributes.

Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Account from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the Map Fields page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click Next.
6. Click the Validate Data button to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. On the Review and Submit page, click Submit.

Reviewing the Import Results

You can review the import results by checking for the import activity on the Manage Import Activity page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click the All Imports infotile. 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.

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

Related Topics

- Managing Import Mappings
- Importing Data: Procedure
Importing Your Activity Data

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

To import Activity 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.

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Activity 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Activity records, the source system of the Activity object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

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

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

- **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Activity object, this attribute is ActivityId:

- **Public unique identifiers**: If you are 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 Activity object, the attribute is ActivityNumber.
## Required Attributes and Validations

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>AccountId</td>
<td>The internal identifier of the account associated with the activity. Examples of account are: customer, organization, person, partner.</td>
<td>Number</td>
<td>18</td>
<td></td>
<td>Not Required</td>
<td>If during update, you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.</td>
</tr>
<tr>
<td>AccountOrigSystem</td>
<td>The code representing the source system for the account associated with the activity.</td>
<td>Text</td>
<td>100</td>
<td>The party must exist. Identify the source system code that was used when you imported the party in a prior batch.</td>
<td>Not Required</td>
<td>If during update, you associate the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.</td>
</tr>
<tr>
<td>AccountPartyNumber</td>
<td>The public unique identifier</td>
<td>Text</td>
<td>30</td>
<td>The party must exist and be</td>
<td>Not Required</td>
<td>If during update, you associate</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating an Activity record</td>
<td>Updating an Existing Activity record</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>------------------------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td></td>
<td>of the account associated with the activity.</td>
<td>Text</td>
<td></td>
<td></td>
<td>a valid party unique identifier</td>
<td>the activity with an account party, then you must provide either the internal ID, such as AccountId, or the public unique value, such as AccountPartyNumber, or the combination of original system and original system reference, such as AccountOrigSystem and OsrAccountId.</td>
</tr>
<tr>
<td>ActionCode</td>
<td>Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.</td>
<td>Text</td>
<td>10</td>
<td>The valid values are INSERT, UPDATE, and DELETE. If not provided, record matching is used to determine whether a record is updated (if it already exists) or inserted (if it does not exist).</td>
<td>Not Required</td>
<td>To delete a record, you must provide the value as DELETE. It is optional to provide values for insert and update as the framework internally decides the action as INSERT if it is a new record or UPDATE if it is an existing record.</td>
</tr>
<tr>
<td>ActivityCreatedBy</td>
<td>The user who created the activity.</td>
<td>Text</td>
<td>64</td>
<td>This must be a valid value existing in the HZ_PARTIES table.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>ActivityCreationDate</td>
<td>The date when the record was created.</td>
<td>Date Time</td>
<td>6</td>
<td>The default date is considered.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ActivityDesc</td>
<td>The description of the activity.</td>
<td>Long Text</td>
<td>4000</td>
<td>Not Applicable</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ActivityEndDate</td>
<td>The date and time when an appointment ends or the time</td>
<td>Date Time</td>
<td>6</td>
<td>This must be a valid date and should not be less than the ActivityStartDate.</td>
<td>A value is required if you are creating a new activity having</td>
<td>Optional</td>
</tr>
</tbody>
</table>
## Chapter 9

### Understanding Import and Export Management

#### Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActivityFunctionCode</td>
<td>Identifies the activity as an appointment or a task. This attribute is for internal use only and the value is set based on the user's navigation to the activity.</td>
<td>Text</td>
<td>30</td>
<td>Valid values are APPOINTMENT, TASK, and CALLREPORT. Lookup type used is ZMM_ACTIVITY_FUNCTION_TYPE_CD.</td>
<td>A value is required while creating an activity.</td>
<td>Not Required</td>
</tr>
<tr>
<td>ActivityId</td>
<td>The internal identifier of the activity.</td>
<td>Number</td>
<td>18</td>
<td>Automatically generated by the import process if creating a new activity record.</td>
<td>A value is required if you are updating an existing activity and you are not providing other values to identify the activity record.</td>
<td>Not Required</td>
</tr>
<tr>
<td>ActivityLastUpdateLogin</td>
<td>The date when the record was last updated.</td>
<td>Text</td>
<td>32</td>
<td>The default date is considered.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
</tbody>
</table>

- When a task is completed, ActivityFunctionCode is set as APPOINTMENT.

- To update an existing activity, choose one of the following options to identify the record:
  - The unique ID for the record (ActivityId)
  - The activity number (ActivityNumber)
  - The source system code and reference (OrigEntityNumber and OrigEntityCode)
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating an Activity record | Updating an Existing Activity record
---|---|---|---|---|---|---
ActivityMtgMinutes | The minutes of meeting of the activity. | Long Text | 4000 | If no value is provided, the corresponding value from Activity production table is used. | Optional | Optional
ActivityNumber | The public unique identifier of the activity. Indicates a default system-generated number for the activity. | Text | 64 | If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object using the Schedule Export Process task in the Setup and Maintenance work area. The table ZMM_ACCTY_ACTIVITIES with column ACTIVITY_NUMBER holds the existing value. | Required | A value is required if you are updating an existing activity and you are not providing other values to identify the activity record.

To update or delete an existing activity you must choose one of the following options to identify the record:

- The unique ID for the record (ActivityId)
- The activity number (ActivityNumber)
- The source system code and reference (OrigEntityNumber and OrigEntityCode)

ActivityStartDate | The starting date and time of an appointment or a task. The default value for an appointment is null. The default value for a task is the date and time at which the task is created. | Date Time | If no value is provided, the corresponding value from Activity production table is used. | A value is required if you are creating a new activity having ActivityFunctionCode as APPOINTMENT. | Optional |
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActivityTypeCode</td>
<td>The channel through which communication has taken place.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table will be used. If the ActivityFunctionCode is 'APPOINTMENT' and the action is 'INSERT' then the default value will be set to 'MEETING'.</td>
<td>If no value is provided, the corresponding value is used from the Activity production table. If the ActivityFunctionCode is 'APPOINTMENT' and the action is 'INSERT', the default value will be set to 'MEETING'.</td>
<td>Optional</td>
</tr>
<tr>
<td>ActivityUpdateDate</td>
<td>The date when the record was last updated.</td>
<td>Date Time</td>
<td></td>
<td>The default date is considered.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>ActivityUpdatedBy</td>
<td>The login of the user who last updated the record.</td>
<td>Text</td>
<td>64</td>
<td>Not Applicable</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>ActivityUserLastUpdate</td>
<td>The date when the record was last updated by the activity user.</td>
<td>Date Time</td>
<td></td>
<td>The default date is considered.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>AllDayFlag</td>
<td>Indicates whether the appointment is for the entire day. If the value is True, the appointment is for the entire day. The default value is False.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>AssessmentId</td>
<td>The internal identifier of the assessment that is associated to the activity or the activity template.</td>
<td>Number</td>
<td>18</td>
<td>Optional. This must be a valid id existing in the MOW_ ASSESSMENTS table.</td>
<td>Optional. This must be a valid id existing in the MOW_ ASSESSMENTS table.</td>
<td>Optional</td>
</tr>
<tr>
<td>AutoLogSource</td>
<td>The name of the source of the activity in case of legacy systems.</td>
<td>Text</td>
<td>30</td>
<td>Optional. No validation</td>
<td>Optional. No validation</td>
<td>Optional</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity record</td>
<td>Updating an Existing Activity record</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>BuOrgId</td>
<td>The internal identifier of the business unit.</td>
<td>Number</td>
<td>18</td>
<td></td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Not applicable</td>
</tr>
<tr>
<td>CampaignId</td>
<td>The internal identifier of the related campaign.</td>
<td>Number</td>
<td>18</td>
<td></td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber. When updating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber.</td>
</tr>
<tr>
<td>CampaignNumber</td>
<td>The public unique identifier of the related campaign.</td>
<td>Text</td>
<td>64</td>
<td></td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber. When updating an Activity, if you associate the Activity with a campaign, then you must provide either the internal ID, such as CampaignId, or the public unique value, such as CampaignNumber.</td>
</tr>
<tr>
<td>ClaimCode</td>
<td>The public unique identifier for claim.</td>
<td>Text</td>
<td>100</td>
<td></td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an Activity, if you associate the Activity with a claim, provide either the internal ID, such as claim ID, or the public unique value, such as claim code. Ensure that this is a valid claim code from MKT_BDT_CLAIMS. Optional. Ensure that this is a valid claim code from MKT_BDT_CLAIMS.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity record</td>
<td>Updating an Existing Activity record</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ClaimId</td>
<td>The internal identifier of the claim.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value</td>
<td>When creating an activity, if you associate the activity with a claim, then you must provide</td>
<td>Optional. Ensure that this is a valid claim ID from the MKT_BDT_CLAIMS table.</td>
</tr>
<tr>
<td></td>
<td>of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td></td>
<td></td>
<td>the internal ID, such as claim ID, or the public unique value, such as claim code. Ensure that this is a valid claim ID from the MKT_BDT_CLAIMS table.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Optional. Ensure that this is a valid claim ID from the MKT_BDT_CLAIMS table.</td>
<td></td>
</tr>
<tr>
<td>CorpCurrencyCode</td>
<td>The corporate currency used by the activity.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td></td>
</tr>
<tr>
<td>CurcyConvRateType</td>
<td>The rate of currency conversion for an activity.</td>
<td>Text</td>
<td>39</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td></td>
</tr>
<tr>
<td>CurrencyCode</td>
<td>The corporate currency used by the activity.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td></td>
</tr>
<tr>
<td>CustomerAccountId</td>
<td>The internal identifier of the customer account related to the activity. It is the sales account identifier from ZCA_SALES_ACCOUNTS table.</td>
<td>Number</td>
<td>18</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>The internal identifier of the customer account related to the activity. It is the sales account identifier from ZCA_SALES_ACCOUNTS table.</td>
<td>This should be a valid sales account identifier from the ZCA_SALES_ACCOUNTS table.</td>
</tr>
<tr>
<td>DealId</td>
<td>The internal identifier of the</td>
<td>Number</td>
<td>18</td>
<td>You can determine the</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity record</td>
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</tr>
<tr>
<td>---------------------------</td>
<td>------------------------------------------------------------------------------</td>
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<td>---------------------------------------------</td>
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<td>--------------------------------------</td>
</tr>
<tr>
<td>DealNumber</td>
<td>The public unique identifier of the deal associated to the activity. The identifier can also be generated from an external source.</td>
<td>Text</td>
<td>80</td>
<td>Optimal</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>DelegatorId</td>
<td>The internal identifier of the activity resource that delegated activity ownership to another resource.</td>
<td>Number</td>
<td>18</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>DelegatorOrigSystem</td>
<td>The source system reference to the delegator of original system identifier.</td>
<td>Text</td>
<td>100</td>
<td>Optimal</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>DirectionCode</td>
<td>The direction options for an activity. The options</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from</td>
<td>This should be a valid lookup code</td>
<td>This should be a valid lookup code corresponding</td>
</tr>
</tbody>
</table>

When creating an activity, if you associate the activity with a deal, you must provide either the internal ID, such as dealId, or the public unique value, such as DealNumber. When creating an activity, if you associate the activity with a deal, you must provide either the internal ID, such as dealId, or the public unique value, such as DealNumber.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>EnrollmentId</td>
<td>The internal identifier of the related program enrollment.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, if you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber. This must be a valid value in the ZPM_PROGRAM_ENROLLMENTS table.</td>
<td>If during update, you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber.</td>
</tr>
<tr>
<td>DueDate</td>
<td>The date the activity is due to be completed.</td>
<td>Date</td>
<td></td>
<td>If no value is provided, the corresponding value from Activity production table is used. This should be a valid date.</td>
<td>This should be a valid date.</td>
<td>This should be a valid date.</td>
</tr>
<tr>
<td>Duration</td>
<td>The actual duration of the activity in the appropriate unit of measure.</td>
<td>Number</td>
<td></td>
<td>If no value is provided, then the corresponding value from Activity production table is used. If the ActivityFunctionCode is ‘APPOINTMENT’ and the Duration is NULL then the default value will be the duration of days between the Activity Start Date and the Activity End Date.</td>
<td>This is a derived field. Any value provided is ignored.</td>
<td>This is a derived field. Any value provided is ignored</td>
</tr>
</tbody>
</table>

- **Attribute**: any attribute name
- **Description**: description of the attribute
- **Data Type**: type of data
- **Data Length**: length of data
- **Prerequisite Setup Task/ Import Validations**: task related to data

- **Creating an Activity record**: to ZMM_ACTIVITY_DIRECTION from fnd_lookups.
- **Updating an Existing Activity record**: to ZMM_ACTIVITY_DIRECTION from fnd_lookups.
<p>| Attribute        | Description                                                                 | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating an Activity record                                                                                                                                                                                                                                                                                                                                 | Updating an Existing Activity record                                                                                                                                                                                                                   |
|------------------|------------------------------------------------------------------------------|-----------|-------------|--------------------------------------------|                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                           |
| EnrollmentNumber | The public unique identifier of the related program enrollment.              | Text      | 30          |                                               | You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area. When creating an activity, if you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber. This must be a valid value in the ZPM_PROGRAM_ENROLLMENTS table. If during update, you associate the activity with a program enrollment, then you must provide either the internal ID, such as EnrollmentId, or the public unique value, such as EnrollmentNumber. |                                                                                                                                                                                                                                                                                                                                                           |
| FundRequestCode  | The foreign key to FUND_REQUEST_CODE of the MKT_BDT_FUND_REQUESTS table.    | Text      | 100         |                                               | You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area. When creating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_REQUESTS table. When updating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_REQUESTS table. |                                                                                                                                                                                                                                                                                                                                                           |
| FundRequestId    | The internal identifier of the fund request.                                | Number    | 18          |                                               | You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area. When creating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_REQUESTS table. When updating an activity, if you associate the activity with a fund request, you must provide either the internal ID, such as FundRequestId, or the public unique value, such as FundRequestCode. This must be a valid value in the MKT_BDT_FUND_REQUESTS table. |                                                                                                                                                                                                                                                                                                                                                           |</p>
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>InternalOvn</td>
<td>The attribute is used to handle optimistic locking on the object that is being updated. It is for internal use only.</td>
<td>Number</td>
<td>9</td>
<td>This is an internal system field. You cannot update this field.</td>
<td>This is an internal system field. You cannot update this field.</td>
<td>This is an internal system field. You cannot update this field.</td>
</tr>
<tr>
<td>LeadId</td>
<td>The internal identifier of the related lead.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, if you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber. Must be valid in the MKL_LM_LEADS table.</td>
<td>If during update, you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber.</td>
</tr>
<tr>
<td>LeadNumber</td>
<td>The public unique identifier of the related lead.</td>
<td>Text</td>
<td>60</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, if you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber. Must be valid in the MKL_LM_LEADS table.</td>
<td>If during update, you associate the activity with a lead, then you must provide either the internal ID, such as LeadId, or the public unique value, such as LeadNumber.</td>
</tr>
<tr>
<td>Location</td>
<td>The location of the appointment.</td>
<td>Text</td>
<td>200</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>MobileActivityCode</td>
<td>The external mobile used for</td>
<td>Text</td>
<td>50</td>
<td>If no value is provided, the</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity record</td>
<td>Updating an Existing Activity record</td>
</tr>
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<td>-----------</td>
<td>-------------</td>
<td>--------------------------------------------</td>
<td>-----------------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>ObjectiveId</td>
<td>The internal identifier of the objective.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_OBJECTIVES table.</td>
<td>When updating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_OBJECTIVES table.</td>
</tr>
<tr>
<td>ObjectiveNumber</td>
<td>The public unique identifier of the related objective.</td>
<td>Text</td>
<td>30</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_OBJECTIVES table.</td>
<td>When updating an activity, if you associate the activity with a sales objective, you must provide either the internal ID, such as ObjectiveId, or the public unique value, such as ObjectiveNumber. It must be a valid value in the ZCA_OBJECTIVES table.</td>
</tr>
<tr>
<td>OpportunityId</td>
<td>The internal identifier of the related opportunity.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, if you associate the activity with an opportunity, you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber. This must be a valid value in</td>
<td>If during update, you associate the activity with an opportunity, then you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber.</td>
</tr>
</tbody>
</table>

the activity. This is required by the iphone team.

A corresponding value from Activity production table is used.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpportunityNumber</td>
<td>The internal identifier of the related opportunity.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value of the object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area. When creating an activity, if you associate the activity with an opportunity, you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber. This must be a valid value in the MOO_OPTY table. If during update, you associate the activity with an opportunity, then you must provide either the internal ID, such as OpportunityId, or the public unique value, such as OpportunityNumber.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OrigEntityCode</td>
<td>The code indicating the original source of the record.</td>
<td>Text</td>
<td>30</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY. Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. If the record was created in the Activity Management component, the value is ACTIVITY. One of the following must be provided while updating an activity: • ActivityId • ActivityNumber • Combination of OrigEntityNumber and OrigEntityCode</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OrigEntityNumber</td>
<td>The original unique identifier of the existing task, appointment, or interaction in the source system.</td>
<td>Text</td>
<td>30</td>
<td>If the internal action code is &quot;INSERT&quot; and OrigEntityNumber and ActivityNumber are NULL then it will be defaulted to the provided value. If no value is provided, the corresponding value from Activity production table is used. If the internal action code is &quot;INSERT&quot; and OrigEntityNumber and ActivityNumber are NULL, it will be defaulted to the provided value. One of the following must be provided while updating an activity: • ActivityId • ActivityNumber • Combination of OrigEntityNumber and OrigEntityCode</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OsrAccountId</td>
<td>The internal identifier (reference number or text)</td>
<td>Text</td>
<td>500</td>
<td>The party must exist. You can determine the Original System Optional When creating an activity, if you associate the activity with an account</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Attribute Descriptions

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
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<th>Creating an Activity record</th>
<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OsrDelegatorId</td>
<td>The source system reference to the Delegator ID.</td>
<td>Text</td>
<td>500</td>
<td>Optional</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The party must exist. You can determine the Original System Reference for the party by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td></td>
</tr>
<tr>
<td>OsrOwnerId</td>
<td>The internal identifier (reference number or text) of the person who owns the activity in the original source system.</td>
<td>Text</td>
<td>500</td>
<td>One of the following must be provided while creating an activity:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• OwnerId</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• OwnerResourceNumber</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Combination of OwnerOrigSys and OsrOwnerId</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OsrPrimaryContactId</td>
<td>The internal identifier (reference number or text)</td>
<td>Text</td>
<td>500</td>
<td>Optional</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>When updating an activity, if you associate the activity with a</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Notes
- The party must exist. You can determine the Original System Reference for the party by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.
- Reference for the party by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
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</tr>
</thead>
<tbody>
<tr>
<td>OtherPartyPhoneNumber</td>
<td>The inbound phone number that is used to make a call. Identifies the phone number dialed for outbound calls.</td>
<td>Text</td>
<td>40</td>
<td>Not Required</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>OsrReferenceCustomerId</td>
<td>The internal identifier (reference number or text) of the customer in the original source system.</td>
<td>Text</td>
<td>500</td>
<td>The party must exist. You can determine the Original System Reference for the party by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>When creating an activity, you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerld, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.</td>
<td>When updating an activity, if you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerld, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Reference for the party by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.</td>
<td>contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.</td>
</tr>
<tr>
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</tr>
</tbody>
</table>
### Attribute Table

<table>
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<tr>
<th>Attribute</th>
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<th>Updating an Existing Activity record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OutcomeCode</td>
<td>The outcome of the activity.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>OutlookFlag</td>
<td>Indicates whether the activity is created in Outlook. If the value is Y, then the activity is created in Outlook and synchronized.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used. If the ActivityFunctionCode is ‘APPOINTMENT’ and the Action is ‘INSERT’ then the value is set to ‘N’.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>OutlookIdentifier</td>
<td>The unique identifier for the activity in Outlook.</td>
<td>Text</td>
<td>256</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Ownerld</td>
<td>The internal identifier of the activity owner. The owner has to be an existing party (person) in system.</td>
<td>Number</td>
<td>18</td>
<td>The party must exist. You can determine the PartyId of a person by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>Provide one of the following while creating an activity: (Ownerld, OwnerResourceNumber or a combination of OwnerOrigSystem and OsrOwnerId)</td>
<td>Optional</td>
</tr>
<tr>
<td>OwnerOrigSystem</td>
<td>The code representing the source system for the party (person) who owns the activity.</td>
<td>Text</td>
<td>100</td>
<td>The party must exist. You can determine the PartyId of a person by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>Provide one of the following while creating an activity: (Ownerld, OwnerResourceNumber or a combination of OwnerOrigSystem and OsrOwnerId)</td>
<td>Optional</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
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<td>------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OwnerResourceId</td>
<td>The public unique identifier of the party (person) who owns the activity.</td>
<td>Text</td>
<td>30</td>
<td></td>
<td>The party must exist. You can determine the PartyId of a person by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>Provide one of the following while creating an activity: (OwnerId, OwnerResourceId) or a combination of OwnerOrigSystem and OsrOwnerId.</td>
</tr>
<tr>
<td>ParentActivityId</td>
<td>The related activity identifier and only applicable if the record is a follow up activity.</td>
<td>Number</td>
<td>18</td>
<td>Conditionally Required only for follow-up activity. One of the following options to identify the parent record needs to be provided:</td>
<td>A value is required if you are creating a follow-up activity. While creating an activity, choose one of the following options to identify the record:</td>
<td>Optional While updating an activity, choose one of the following options to identify the record: The unique ID for the ParentActivityId. The parent activity number (ParentActivityNumber). The source system code and source reference code (ParentOrigEntityNumber and ParentOrigEntityCode).</td>
</tr>
<tr>
<td>ParentActivityNumber</td>
<td>The public unique identifier of the related activity and only applicable if the record is a follow up activity.</td>
<td>Text</td>
<td>64</td>
<td>Conditionally Required only for follow-up activity. One of the following options to identify the parent record needs to be provided:</td>
<td>A value is required if you are creating a follow-up activity. While creating an activity, choose one of the following options to identify the record:</td>
<td>Optional While updating an activity, choose one of the following options to identify the record:</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity record needs to be provided:</td>
<td>Updating an Existing Activity record needs to be provided:</td>
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</tr>
<tr>
<td>ParentOrigEntityCode</td>
<td>The source of the activity record that indicating whether it is coming from Task entity, Interaction entity, or Appointment entity.</td>
<td>Text</td>
<td>30</td>
<td>Conditionally Required only for follow-up activity. One of the following options to identify the parent record needs to be provided:</td>
<td>A value is required if you are creating a follow-up activity. While creating an activity, choose one of the following options to identify the record:</td>
<td>Optional While updating an activity, choose one of the following options to identify the record:</td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>Attribute</td>
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<td>Data Type</td>
<td>Data Length</td>
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<td>Creating an Activity record</td>
<td>Updating an Existing Activity record</td>
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</tr>
</tbody>
</table>
| ParentOrigEntityNumber      | The entity number of the parent entity in the original system to which the activity is related | Text      | 30          | Conditionally Required only for follow-up activity. One of the following options to identify the parent record needs to be provided:  
  - The unique ID for the record (ParentActivityId)  
  - The parent activity number (ParentActivityNumber)  
  - The source system code and source reference code (ParentOrigEn and ParentOrigEnt). | A value is required if you are creating a follow-up activity. While creating an activity, choose one of the following options to identify the record:  
  - The unique ID for the record (ParentActivityId).  
  - The parent activity number (ParentActivityNumber).  
  - The source system code and source reference code (ParentOrigEn and PartnerOrigEnt). | Optional, while updating an activity, choose one of the following options to identify the record:  
  - The unique ID for the record (ParentActivityId).  
  - The parent activity number (ParentActivityNumber).  
  - The source system code and source reference code (ParentOrigEn and PartnerOrigEnt). |
<p>| PartnerProgramId            | The internal identifier of the related partner program.                      | Number    | 18          | You can determine the public unique value of the object by exporting the Schedule Export Process task in the Setup and Maintenance work area. For partner programs, export the Program Enrollments object. | When creating an activity, if you associate the activity with a partner program, you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNum. | When updating an activity, if you associate the activity with a partner program, then you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNum. |
| PartnerProgramNum           | The public unique identifier of the related partner program.                 | Text      | 30          | You can determine the public unique value of the object by exporting the Program Enrollments object. | When creating an activity, if you associate the activity with a partner program, then you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNum. | When updating an activity, if you associate the activity with a partner program, then you must provide either the internal ID, such as PartnerProgramId, or the public unique value, such as PartnerProgramNum. |</p>
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</tr>
</thead>
<tbody>
<tr>
<td>PartnerUsageFlag</td>
<td>Indicates whether the activity is created for an organization account with usage as Partner.</td>
<td>Text</td>
<td>1</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>PercentageComplete</td>
<td>The amount of activity completed in percentage. This is a free form numeric value ranging from 0 to 100.</td>
<td>Number</td>
<td>Not Applicable</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>PrimaryContactId</td>
<td>The internal identifier of the activity contact.</td>
<td>Number</td>
<td>18</td>
<td>Optional</td>
<td>Optional</td>
<td>When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrgSystem.</td>
</tr>
</tbody>
</table>

If no value is provided, the corresponding value from Activity production table is used. If the PartnerUsageFlag in the Activity production table is NULL, then the value is set to 'N'.

If no value is provided, the corresponding value from Activity production table is used. The valid values range from 0 to 100.

If no value is provided, the corresponding value from Activity production table is used. The valid values range from 0 to 100.

If no value is provided, the corresponding value from Activity production table is used. When creating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrgSystem.
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<tbody>
<tr>
<td>PrimaryContactOrigSystem</td>
<td>The code representing the source system for the activity contact.</td>
<td>Text</td>
<td>100</td>
<td>Optional</td>
<td>When creating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.</td>
<td>When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.</td>
</tr>
<tr>
<td>PrimaryContactPartyNumber</td>
<td>The public unique identifier of the activity contact.</td>
<td>Text</td>
<td>30</td>
<td>Optional</td>
<td>When creating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.</td>
<td>When updating an activity, if you associate the activity with a contact party, then you must provide either the internal ID, such as PrimaryContactId, or the public unique value, such as PrimaryContactPartyNumber, or the combination of original system and original system reference, such as PrimaryContactOrigSystem and OsrPrimaryContactId.</td>
</tr>
<tr>
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<td>Description</td>
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</tr>
<tr>
<td>PriorityCode</td>
<td>The priority of the activity. The default value is 2. The possible values are 1, 2, 3.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Not required</td>
<td>When updating an activity, if you need to modify the priority of an Activity, provide a valid value for PriorityCode.</td>
</tr>
<tr>
<td>PrivateFlag</td>
<td>Indicates whether the activity is private.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>When updating an activity, if you need to mark an Activity as private, set this variable to 'Y'.</td>
</tr>
<tr>
<td>RecurDay</td>
<td>The specific day of the month when the appointment recurs.</td>
<td>Number</td>
<td>18</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurEndDate</td>
<td>The date when a recurring appointment ends.</td>
<td>Date Time</td>
<td></td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurEveryOptionFlg</td>
<td>Indicates the frequency of recurrence of an appointment. If the recurrence is everyday of the week, it is set to Y if it is weekdays only, it is set to N. The recurring options are every day, week, month, year, and so on.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurExceptionFlag</td>
<td>Indicates if the appointment instance is updated outside the recurring</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
</tbody>
</table>
### Importing Your Data

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>RecurFrequency</td>
<td>The frequency with which the recurring appointment series repeats.</td>
<td>Number</td>
<td>Not Applicable</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurFriFlag</td>
<td>Indicates if the activity recurs on Friday.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Valid values are Y and N.</td>
</tr>
<tr>
<td>RecurInstanceStartDate</td>
<td>The start date of an instance of a series.</td>
<td>Date Time</td>
<td></td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurMonFlag</td>
<td>Indicates if the activity recurs on Monday.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Valid values are Y and N.</td>
</tr>
<tr>
<td>RecurMonth</td>
<td>The recurrence of an appointment in a specified month.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurNumOfInstances</td>
<td>The total number of recurring instances.</td>
<td>Number</td>
<td>Not applicable</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurOrigInstDate</td>
<td>The original date of a recurring appointment instance.</td>
<td>Date Time</td>
<td>Not applicable</td>
<td>If no value is provided, the corresponding value from</td>
<td>Optional</td>
<td>Optional</td>
</tr>
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</tr>
<tr>
<td>RecurPattern</td>
<td>The recurring appointment for a specific week, for example, First, Second, Third, Fourth, Last. The recurrence can be monthly or yearly.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurRecType</td>
<td>The recurrence type of the appointment such as “I” for instance, “S” for series, and “N” for non-recurring. Do not populate if Activity is of type Task. This is for internal use only.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>For internal usage</td>
<td>For internal usage</td>
</tr>
<tr>
<td>RecurSatFlag</td>
<td>Indicates if the activity recurs on Saturday.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>RecurSerOrigEntityN</td>
<td>The entity number of the recurring appointment in the original system, to which this activity is related</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
</tbody>
</table>

A value is required if you are creating a recurring activity (appointment). While creating an activity, choose one of the following options to identify the record:

- The unique ID for the record (RecurSeriesId)
- The recurring series...
<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>RecurSeriesActivityNumber</td>
<td>The activity number of an instance of a series.</td>
<td>Text</td>
<td>64</td>
<td>Optional</td>
<td>A value is required if you are creating a recurring activity (appointment). While creating an activity, choose one of the following options to identify the record:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• The unique ID for the record (RecurSeriesId)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• The recurring series activity number (RecurSeriesId)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• The entity number of the recurring appointment in the original system, to which this activity is related (RecurSerOrig)</td>
<td></td>
</tr>
<tr>
<td>RecurSeriesId</td>
<td>The internal identifier for the series that links instances of a series together.</td>
<td>Number</td>
<td>18</td>
<td>Optional</td>
<td>A value is required if you are creating a recurring activity (appointment).</td>
<td></td>
</tr>
<tr>
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<td>----------------------------------------</td>
</tr>
<tr>
<td>RecurSunFlag</td>
<td>Indicates if the activity recurs on Sunday.</td>
<td>Text</td>
<td>1</td>
<td>Optional Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
</tr>
<tr>
<td>RecurThuFlag</td>
<td>Indicates if the activity recurs on Thursday.</td>
<td>Text</td>
<td>1</td>
<td>Optional Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
</tr>
<tr>
<td>RecurTueFlag</td>
<td>Indicates if the activity recurs on Tuesday.</td>
<td>Text</td>
<td>1</td>
<td>Optional Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
</tr>
<tr>
<td>RecurTypeCode</td>
<td>The repeating type of the series.</td>
<td>Text</td>
<td>30</td>
<td>Optional Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
<td>Valid values are Y and N.</td>
</tr>
<tr>
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</tr>
<tr>
<td>RecurWedFlag</td>
<td>Indicates if the activity recurs on Wednesday.</td>
<td>Text</td>
<td>1</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Lookup type used is ZMM_ACTIVITY_RECUR_TYPE_CD.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RecurWeekday</td>
<td>The activity that recurs on every weekday such as Monday to Sunday, Weekday, Weekend, and so on.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Activity production table is used.</td>
<td>Conditionally required for a weekly recurring appointment. Must be a valid value from ZMM_ACTIVITY_RECUR_DAYWEEK_CD lookup.</td>
<td>Conditionally required for a weekly recurring appointment. Must be a valid value from ZMM_ACTIVITY_RECUR_DAYWEEK_CD lookup.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Lookup type used is ZMM_ACTIVITY_RECUR_TYPE_CD.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RefCustOrigSystem</td>
<td>The source system code for the reference customer.</td>
<td>Text</td>
<td>100</td>
<td>The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones by using the Manage Trading Community Source Systems task in the Setup and Maintenance work area.</td>
<td>The party must exist. Identify the source system code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones by using the Manage Trading Community Source Systems task in the Setup and Maintenance work area.</td>
<td>When updating an activity, if you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerId, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerId.</td>
</tr>
<tr>
<td>RefCustPartyNumber</td>
<td>The public unique identifier of the reference</td>
<td>Text</td>
<td>30</td>
<td>The party must exist. Identify the source system</td>
<td>The party must exist. Identify the source system</td>
<td>When updating an activity, if you associate</td>
</tr>
<tr>
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</tr>
<tr>
<td>ReferenceCustomer</td>
<td>The internal identifier of the reference customer who is associated with the activity.</td>
<td>Number</td>
<td>18</td>
<td>code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones by using the Manage Trading Community Source Systems task in the Setup and Maintenance work area.</td>
<td>code that was used when you imported the party in a prior batch. You can determine existing source system codes and create new ones by using the Manage Trading Community Source Systems task in the Setup and Maintenance work area.</td>
<td>the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerld, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerld.</td>
</tr>
<tr>
<td>SrId</td>
<td>The foreign key to SR_ID in the SVC_SERVICE_REQUESTS table.</td>
<td>Number</td>
<td>18</td>
<td>You can determine the public unique value of this object by exporting the object using the Schedule Export Process task in the Setup and Maintenance work area.</td>
<td>You can determine the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value.</td>
<td>When updating an activity, if you associate the activity with a referenced customer party, then you must provide either the internal ID, such as ReferenceCustomerld, or the public unique value, such as RefCustPartyNumber, or the combination of original system and original system reference, such as RefCustOrigSystem and OsrReferenceCustomerld.</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/ Import Validations | Creating an Activity record | Updating an Existing Activity record
--- | --- | --- | --- | --- | --- | ---
SrNumber | The foreign key to SR_NUMBER in the SVC_SERVICE_REQUESTS table. | Text | 30 | Maintenance work area. | When creating an activity, if you associate the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value, such as SrNumber. This must be a valid value in SVC_SERVICE_REQUESTS. | When updating an activity, if you associate the activity with a service request, then you must provide either the internal ID, such as SrId, or the public unique value, such as SrNumber. This must be a valid value in SVC_SERVICE_REQUESTS. |
StatusCode | The status of the activity. The default value is Not Started. | Text | 30 | | If no value is provided, the default is NOT_STARTED. The lookup Type used is ZMM_ACTIVITY_STATUS_CD. | Optional The lookup Type used is ZMM_ACTIVITY_STATUS_CD. |
Subject | The unique subject, name, or title of the activity. | Text | 500 | No validation | A value is required if you are creating a new activity. | Not Required |
SubmittedDate | The date and time when the call report was submitted. | Date time | Not applicable | Conditionally required for a call report in Submitted status. | Conditionally required for a call report in Submitted status. |
### Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity record status. This must be a valid date.</th>
<th>Updating an Existing Activity record status. This must be a valid date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SwitchCallId</td>
<td>The call ID from which the call is directed.</td>
<td>Text</td>
<td>128</td>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>TemplateDuration</td>
<td>The duration in number of days, for the template activity. This attribute is used with the start date when generating an activity from a template in order to calculate the due date.</td>
<td>Number</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
<tr>
<td>TemplateFlag</td>
<td>Indicates whether this is a template activity.</td>
<td>Text</td>
<td>1</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
<tr>
<td>TemplateId</td>
<td>The internal identifier of the template associated with the activity.</td>
<td>Number</td>
<td>18</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
<tr>
<td>TemplateLeadTime</td>
<td>The lead time that is calculated from the activity start date for the template activity.</td>
<td>Number</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

You can view the Activity 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.

### Creating Source CSV File for Import

The .csv file is provided as input to the file-based data import process. You must populate the .csv file with the data you want to import into Oracle Applications Cloud.

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

1. In the Navigator, under Tools, click Import Management.
2. Click Import Objects tab to open the Import Object Details page.
3. Select the object you’re interested in the Import Object Details page and click the Download icon next to that object name.
4. Save the template CSV file to a location on your desktop.
You must edit the template .csv file and provide valid values for the required attributes as shown in the following table:

<table>
<thead>
<tr>
<th>OwnerID</th>
<th>PriorityCode</th>
<th>StatusCode</th>
<th>PrivateFlag</th>
<th>ActivityFunctionCode</th>
<th>ActivityTypeCode</th>
<th>Location</th>
<th>Subject</th>
<th>ActivityNumber</th>
</tr>
</thead>
<tbody>
<tr>
<td>100010032635399</td>
<td>2</td>
<td>IN_PROGRESS</td>
<td>N</td>
<td>TASK</td>
<td>CALL</td>
<td>TEST</td>
<td>IMPORTANT</td>
<td>ACTY_10011</td>
</tr>
</tbody>
</table>

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

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

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

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

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

**Related Topics**
- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud
Importing Your Activity Assignee Data

Use this topic to import Activity Assignee data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete Activity Assignees.

To import Activity Assignee 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.

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Activity 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Activity Assignee records, the source system of the Activity Assignee object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

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

The preferred option to uniquely identify an object record is as follows:

- **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Activity Assignee object, these attributes are as follows:
  - ActivityId and AssigneeId
  - ActivityId and AssigneeResourceNumber
Required Attributes and Validations

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

The following table lists the required attributes for importing new Activity Assignee records, required attributes for updating asset records, prerequisite setup tasks for the attributes, and specific validations, if any, for Activity Assignee import:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Assignee record</th>
<th>Updating an Existing Activity Assignee record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActionCode</td>
<td>Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.</td>
<td>Text</td>
<td>10</td>
<td>The valid values are INSERT, UPDATE, and DELETE. If not provided, record matching is used to determine whether a record is updated (if it already exists) or inserted (if it does not exist).</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>ActivityId</td>
<td>The internal identifier of the activity to which the assignee is associated.</td>
<td>Number</td>
<td>18</td>
<td>Automatically generated by the import process if creating a new activity record.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
</tbody>
</table>

- **ActionCode**
  - Indicates the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.
  - **Text**
  - **10**
  - The valid values are INSERT, UPDATE, and DELETE. If not provided, record matching is used to determine whether a record is updated (if it already exists) or inserted (if it does not exist).

- **ActivityId**
  - The internal identifier of the activity to which the assignee is associated.
  - **Number**
  - **18**
  - Automatically generated by the import process if creating a new activity record.

A value is required if you are updating an existing activity and you are not providing other values to identify the activity record.

To update an existing activity, choose one of the following options to identify the record:

- The unique ID for the record (ActivityId)
- The activity number (ActivityNumber)
### Attribute | Description | Data Type | Data Length | Prerequisite | Creating an Activity Assignee record | Updating an Existing Activity Assignee record
--- | --- | --- | --- | --- | --- | ---
**ActivityNumber** | The public unique identifier of the activity to which the assignee is associated | Text | 64 | If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object using the Schedule Export Process task in the Setup and Maintenance work area. The table ZMM_ACTIVITY_ACTIVITIES with column ACTIVITY_NUMBER holds the existing value. | A value is required if you are creating a new activity. | A value is required if you are updating an existing activity and you are not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record:
- The unique ID for the record (ActivityId)
- The activity number (ActivityNumber)
- The source system code and reference (OrigEntityNumber and OrigEntityCode)

**AssigneeId** | The internal identifier of the HZ_PARTY record having PARTY_USAGE as Resource. | Number | 18 | If no value is provided, the corresponding value from Assignee production table is used. | A value is required if you are associating a new assignee to an activity. One of the following must be provided | To update or delete an existing activity assignee you must choose one of the following options to identify the record:
- The unique ID for the
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Assignee record</th>
<th>Updating an Existing Activity Assignee record</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssigneeOrigSystem</td>
<td>The source system reference to the assigned resource organization.</td>
<td>Text</td>
<td>100</td>
<td>None</td>
<td>A value is required if you are associating a new assignee to an activity.</td>
<td>Not Required</td>
</tr>
<tr>
<td>AssigneeResourceNumber</td>
<td>The resource number associated with an assignee.</td>
<td>Text</td>
<td>30</td>
<td>None</td>
<td>A value is required if you are associating a new assignee to an activity.</td>
<td>Not Required</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity Assignee record</td>
<td>Updating an Existing Activity Assignee record</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>--------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>AttendeeFlag</td>
<td>Indicates whether an assignee is an attendee.</td>
<td>Text</td>
<td>1</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>CorpCurrencyCode</td>
<td>The corporate currency used by the activity to which the assignee is associated.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from Assignee production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
</tr>
<tr>
<td>CurcyConvRateType</td>
<td>The rate of currency conversion for an activity to which the assignee is associated.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from Assignee production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
</tr>
<tr>
<td>CurrencyCode</td>
<td>The corporate currency used by the activity to which the assignee is associated.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from Assignee production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
<td>If no value is provided, the corresponding value is used from the Assignee production table.</td>
</tr>
<tr>
<td>InternalOvn</td>
<td>The attribute is used to handle optimistic locking on the object that is being updated. It is for internal use only.</td>
<td>Number</td>
<td>9</td>
<td>This is an internal system field. You cannot update this field.</td>
<td>This is an internal system field. You cannot update this field.</td>
<td>This is an internal system field. You cannot update this field.</td>
</tr>
<tr>
<td>OrigEntityCode</td>
<td>The code indicating the original source of the activity the activity to which the assignee is associated.</td>
<td>Text</td>
<td>30</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>A value is required if you are updating or deleting an existing activity and you are not providing other values to identify the activity record.</td>
</tr>
</tbody>
</table>

To update or delete an existing activity you must choose one of...
### Origin

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Assignee record</th>
<th>Updating an Existing Activity Assignee record</th>
</tr>
</thead>
<tbody>
<tr>
<td>41330</td>
<td>The original unique identifier of the existing task, appointment, or interaction in the source system.</td>
<td>Text</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If the internal action code is ‘INSERT’ and OrigEntityNumber and ActivityNumber are NULL, then it will be defaulted to the provided value. If no value is provided, the corresponding value from Assignee production table is used.

A value is required if you are updating or deleting an existing activity and you are not providing other values to identify the activity record.

To update or delete an existing activity, you must choose one of the following options to identify the record:

- The unique ID for the record (ActivityId)
- The activity number (ActivityNumber)
- The source system code and reference (OrigEntityNumber and OrigEntityCode)
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Existing Activity Assignee record</th>
<th>Updating an Existing Activity Assignee record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OsrAssigneeId</td>
<td>The source system reference of the assignee.</td>
<td>Text</td>
<td>500</td>
<td>The party must exist. You can determine the Original System Reference for the party by exporting the Party object using the Schedule Export Process task in the Setup and Maintenance work area. A value is required if you are associating a new assignee to an activity. One of the following must be provided while creating an assignee: • AssigneeId • AssigneeResourceNumber • Combination of AssigneeOrigSystem and OsrAssigneeId</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurInstanceStartId</td>
<td>The start date of a recurring appointment in a series.</td>
<td>Date Time</td>
<td>Not applicable</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurSerOrigEntityNumber</td>
<td>The entity number of the recurring appointment in the original system, to which this activity is related</td>
<td>Text</td>
<td>30</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurSeriesActivityNumber</td>
<td>The activity number of an instance of a series of recurring appointments.</td>
<td>Text</td>
<td>64</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurSeriesId</td>
<td>The internal identifier for the series that links instances of a series together.</td>
<td>Number</td>
<td>18</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>ReminderDateTime</td>
<td>The actual time for sending the reminder for the appointment.</td>
<td>Date Time</td>
<td>Not Applicable</td>
<td>No Validation</td>
<td>Optional</td>
<td>Optional</td>
</tr>
</tbody>
</table>

(OrigEntityNumber and OrigEntityCode)
### Understanding Import and Export Management

#### Chapter 9

#### Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Assignee record</th>
<th>Updating an Existing Activity Assignee record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ReminderPeriod</td>
<td>The time period for sending the reminder for the appointment.</td>
<td>Number</td>
<td>9</td>
<td>No Validation</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>ResponseCode</td>
<td>The user-friendly name for the appointment response code that indicates the participant’s response to the meeting request. Valid values are ACCEPT, NOT_RESPONDED, TENTATIVELY_ACCEPT and REJECT.</td>
<td>Text</td>
<td>30</td>
<td>The valid values are as follows:</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>ShowTmeAsCode</td>
<td>Indicates whether the participant is busy or free during a certain time period. Valid values are BUSY, FREE, and TENTATIVE.</td>
<td>Text</td>
<td>30</td>
<td>The valid values are:</td>
<td>Optional</td>
<td>Optional</td>
</tr>
</tbody>
</table>

You can view the Asset 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.

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes, as shown in the following table:

<table>
<thead>
<tr>
<th>ActivityNumber</th>
<th>Assignee</th>
<th>Status_Code</th>
<th>Assignee_Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTY_10110</td>
<td>300100027318262</td>
<td>NOT_STARTED</td>
<td>INSERT</td>
</tr>
</tbody>
</table>
Creating 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. Sign in as a setup user.
2. In the Navigator, under Tools, click Import Management.
3. On the Manage Imports page, click Create Import Activity.
4. In the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Activity Assignee from the Object drop-down list.
5. In File Name, browse and upload the required .csv file, and click Next.
6. In the Create Import Activity: Map Fields page edit the attribute mappings if required, and click Next.

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

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

Reviewing the Import Results

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

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

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

Related Topics

- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Activity Contact Data

Use this topic to import Activity Contact data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete Activity Contacts.
To import Activity Contact records, perform the following tasks:

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

### Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Activity 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.

### Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Activity Contact records, the source system of the Activity Assignee object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

### Options to Uniquely Identify the Records

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

The preferred option to uniquely identify an object record is as follows:

- **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with “id” in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Activity Contact object, these attributes are as follows:
  - ActivityId and Contact Id
  - ActivityId and ContactPartyNumber
  - ActivityId and combination of OsrContactId and ContactOrigSystem

### Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Contact record</th>
<th>Updating an Existing Activity Contact record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActionCode</td>
<td>Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.</td>
<td>Text</td>
<td>10</td>
<td>The valid values are INSERT, UPDATE, and DELETE. If not provided, record matching is used to determine whether a record is updated (if it already exists) or inserted (if it does not exist).</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>ActivityId</td>
<td>The internal identifier of the activity to which the contact is associated.</td>
<td>Number</td>
<td>18</td>
<td>Automatically generated by the import process if creating a new activity record.</td>
<td>The value is generated automatically by the import process if creating a new activity record.</td>
<td>A value is required if you are updating an existing activity and you are not providing other values to identify the activity record.</td>
</tr>
</tbody>
</table>

To update an existing activity, choose one of the following options to identify the record:

- The unique ID for the record (ActivityId).
- The activity number (ActivityNumber).
- The source system code and reference (OrigEntityNumber and OrigEntityCode).
### Understanding Import and Export Management

#### Chapter 9

**Importing Your Data**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Contact record</th>
<th>Updating an Existing Activity Contact record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActivityNumber</td>
<td>The public unique identifier of the activity to which the contact is associated</td>
<td>Text</td>
<td>64</td>
<td>If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object using the Schedule Export Process task in the Setup and Maintenance work area. The table ZMM_ ACTY_ ACTIVITIES with column ACTIVITY_ NUMBER holds the existing value.</td>
<td>A value is required if you are creating a new activity.</td>
<td>A value is required if you are updating an existing activity and you are not providing other values to identify the activity record.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>To update an existing activity, choose one of the following options to identify the record:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• The unique ID for the record (ActivityId).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• The activity number (ActivityNumber).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• The source system code and reference (OrigEntityNumber and OrigEntityCode).</td>
</tr>
<tr>
<td>AttendeeFlag</td>
<td>Indicates whether a contact is an attendee.</td>
<td>Text</td>
<td>1</td>
<td>Possible values are Y and N.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>ContactId</td>
<td>The party of type person who is involved with this appointment.</td>
<td>Number</td>
<td>18</td>
<td>If no value is provided, the corresponding value from the Contacts production table is used.</td>
<td>A value is required if you are associating a new contact to an activity. One of the following must be provided while creating a contact:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• ContactId</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• ContactPartyId</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Combination of</td>
<td></td>
</tr>
</tbody>
</table>

To update or delete an existing activity contact, select one of the following options to identify the record:

- The unique ID for the record (ActivityId, ContactId).
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Contact record</th>
<th>Updating an Existing Activity Contact record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ContactOrgOrigSysId</td>
<td>The original system ID of the contact.</td>
<td>Text</td>
<td>100</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>ContactOrgPartyNum</td>
<td>The organization party number for the contact.</td>
<td>Text</td>
<td>30</td>
<td>This must be a valid party in the HZ_PARTIES table.</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>ContactOrigSystem</td>
<td>The source system for the activity with which the contact is associated.</td>
<td>Text</td>
<td>100</td>
<td>No Validation</td>
<td>A value is required if you are associating a new contact to an activity.</td>
<td>Not Required</td>
</tr>
<tr>
<td>ContactPartyNum</td>
<td>The party number of the contact.</td>
<td>Text</td>
<td>30</td>
<td>This must be a valid party in the HZ_PARTIES table.</td>
<td>A value is required if you are associating a new contact to an activity.</td>
<td>This must be a valid party in the HZ_PARTIES table</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity Contact record</td>
<td>Updating an Existing Activity Contact record</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CorpCurrencyCode</td>
<td>The corporate currency used by the activity to which the contact is associated.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from the Contacts production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Contacts production table.</td>
<td>If no value is provided, the corresponding value is used from the Contacts production table.</td>
</tr>
<tr>
<td>CurcyConvRateType</td>
<td>The rate of currency conversion for an activity to which the contact is associated.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from the Contacts production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Contacts production table.</td>
<td>If no value is provided, the corresponding value is used from the Contacts production table.</td>
</tr>
<tr>
<td>CurrencyCode</td>
<td>The corporate currency used by the activity to which the contact is associated.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from the Contacts production table is used.</td>
<td>If no value is provided, the corresponding value is used from the Contacts production table.</td>
<td>If no value is provided, the corresponding value is used from the Contacts production table.</td>
</tr>
<tr>
<td>InternalOvn</td>
<td>The attribute is used to handle optimistic locking on the object that is being updated. It is for internal use only.</td>
<td>Number</td>
<td>9</td>
<td>This is an internal system field. You cannot update this field.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>OrigEntityCode</td>
<td>The code indicating the original source of the activity the activity to which the contact is associated.</td>
<td>Text</td>
<td>30</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>A value is required if you are updating or deleting an existing activity and you are not providing other values to identify the activity record.</td>
</tr>
</tbody>
</table>
### Attribute Import and Export Management

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Contact record</th>
<th>Updating an Existing Activity Contact record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OrigEntityNumber</td>
<td>The ID that identifies the entity record in the original system.</td>
<td>Text</td>
<td>30</td>
<td>If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL then it will be defaulted to the provided value. If no value is provided, the corresponding value from Contacts production table is used.</td>
<td>If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL, the value will be set to the value provided by the user. If no value is provided, the corresponding value is used from the Contacts production table.</td>
<td>A value is required if you are updating or deleting an existing activity and you are not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record:</td>
</tr>
</tbody>
</table>

**Note:** If the record was created in the Activity Management component, the value is ACTIVITY.

**Note:** If the record was created in the Activity Management component, the value is ACTIVITY.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Contact record</th>
<th>Updating an Existing Activity Contact record</th>
</tr>
</thead>
</table>
| OsrContactId    | The source system reference of the contact.                                                                                                                                      | Text      | 500         | The contact must exist in system. You can determine the original system reference for the Contact by exporting the Contacts object using the Schedule Export Process task in the Setup and Maintenance work area. A value is required if you are associating a new contact to an activity. One of the following must be provided while creating an assignee:  
• ContactId  
• ContactPartyNumber  
• Combination of ContactOrigS and OsrContactId |                                                      |                                                      |
| OsrContactOrgId | The source system reference to the contact organization. It is used to update the RELATIONSHIP_ID in the interface table (ZMM_IMP_ACTY_CONTACTS) based on HZ_PARTIES.                                                   | Text      | 500         | This must be a valid organization type in the HZ_PARTIES table. This must be a valid organization type in the HZ_PARTIES table. This must be a valid organization type in the HZ_PARTIES table. |                                                      |                                                      |
| RecurInstanceStartDate | The start date of an instance of a series.                                                                                                                                               | Date Time | Not applicable | No Validation | Not Required | Not Required |
| RecurSerOrigEntityNumber | The entity number of the recurring appointment in the original system, to which this activity is related.                                                                               | Text      | 30          | No Validation | Not Required | Not Required |
### Attribute | Description | Data Type | Data Length | Prerequisite | 
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RecurSeriesActivityNumber</strong></td>
<td>The activity number of an instance of a series.</td>
<td>Text</td>
<td>64</td>
<td>No Validation</td>
</tr>
<tr>
<td><strong>RecurSeriesId</strong></td>
<td>The internal identifier for the series that links instances of a series together.</td>
<td>Number</td>
<td>18</td>
<td>No Validation</td>
</tr>
<tr>
<td><strong>RelationshipId</strong></td>
<td>The internal identifier of the relationship that describes the contact and the organization to which the contact is related.</td>
<td>Number</td>
<td>18</td>
<td>No Validation</td>
</tr>
</tbody>
</table>

You can view the Asset 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.

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes, as shown in the following table:

<table>
<thead>
<tr>
<th>ActivityNumber</th>
<th>ContactId</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTY_10110</td>
<td>300100036267977</td>
</tr>
</tbody>
</table>

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

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

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

**Reviewing the Import Results**

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

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

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

**Related Topics**

- **File Import: How It Works**
- **Importing Data from a File: Procedure**
- **File Based Data Import for Oracle Sales Cloud**

**Importing Your Activity Objective Data**

Use this topic to import Activity Objective data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete Activity Objectives.

To import Activity Objective records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (.csv) file for import.
3. Create the import activity.
4. Review the import results.
Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Activity 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Activity Objective records, the source system of the Activity Assignee object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

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

The preferred option for uniquely identifying an object record is to specify the Internal Id. If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Activity Objective object, these attributes are as follows:

- ObjectiveId
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreefmtText)

Required Attributes and Validations

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

The following table lists the required attributes for importing new Activity Objective records, required attributes for updating asset records, prerequisite setup tasks for the attributes, and specific validations, if any, for Activity Objective import:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Objective record</th>
<th>Updating an Existing Activity Objective record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ActionCode</td>
<td>Indicates explicitly the operation to be</td>
<td>Text</td>
<td>10</td>
<td>If value is not provided, record matching is used</td>
<td>Optional</td>
<td>To delete a record, you must provide the value</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Activity Objective record</td>
<td>Updating an Existing Activity Objective record</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>ActivityId</td>
<td>The internal identifier of the activity to which the Objective is associated.</td>
<td>Number</td>
<td>18</td>
<td>Automatically generated by the import process if creating a new activity record.</td>
<td>A value is required if you are updating or deleting an existing activity and you are not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record:</td>
<td>A value is required if you are updating or deleting an existing activity and you are not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record:</td>
</tr>
<tr>
<td>Preformed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.</td>
<td>to determine whether a record is updated (if it already exists) or inserted (if it does not exist). The valid values are INSERT, UPDATE, and DELETE.</td>
<td>as DELETE. It is optional to provide values for insert and update as the framework internally decides the action as INSERT if it is a new record or UPDATE if it is an existing record.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A value is required if you are associating a new objective.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Objective record</th>
<th>Updating an Existing Activity Objective record</th>
</tr>
</thead>
</table>
| ActivityNumber   | The public unique identifier of the activity to which the Objective is associated | Text      | 64          | If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object using the Schedule Export Process task in the Setup and Maintenance work area. The table ZMM_ACTY_ACTIVITIES with column ACTIVITY_NUMBER holds the existing value. | A value is required if you are:  
• Creating an activity  
• Updating or deleting an existing activity and you are not providing other values to identify the activity record.  
To update or delete an existing activity you must choose one of the following options to identify the record:  
• The unique ID for the record (ActivityId).  
• The activity number (ActivityNumber).  
• The source system code and reference (OrigEntityNumber and OrigEntityCode). |                                                                                                  |
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Objective record</th>
<th>Updating an Existing Activity Objective record</th>
</tr>
</thead>
<tbody>
<tr>
<td>CompletedFlag</td>
<td>Indicates whether the set objective is met.</td>
<td>Text</td>
<td>1</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>CorpCurrencyCode</td>
<td>The corporate currency used by the activity to which the Objective is associated.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from the Objectives production table is used.</td>
<td>If no value is provided, the corresponding value from the Objectives production table.</td>
<td>If no value is provided, the corresponding value from the Objectives production table.</td>
</tr>
<tr>
<td>CurcyConRateType</td>
<td>The rate of currency conversion for an activity to which the Objective is associated.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the corresponding value from the Objectives production table is used.</td>
<td>If no value is provided, the corresponding value from the Objectives production table.</td>
<td>If no value is provided, the corresponding value from the Objectives production table.</td>
</tr>
<tr>
<td>CurrencyCode</td>
<td>The corporate currency used by the activity to which the Objective is associated.</td>
<td>Text</td>
<td>15</td>
<td>If no value is provided, the corresponding value from the Objectives production table is used.</td>
<td>If no value is provided, the corresponding value from the Objectives production table.</td>
<td>If no value is provided, the corresponding value from the Objectives production table.</td>
</tr>
<tr>
<td>InternalOwn</td>
<td>The attribute is used to handle optimistic locking on the object that is being updated. It is for internal use only.</td>
<td>Number</td>
<td>9</td>
<td>This is an internal system field. You cannot update this field.</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>ObjectiveCode</td>
<td>The set of predefined objectives defined by the administrator</td>
<td>Text</td>
<td>30</td>
<td>A value is required if you are associating a new objective</td>
<td>A value is required if you are associating a new objective</td>
<td>A value is required if you are associating a new objective</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating an Activity Objective record | Updating an Existing Activity Objective record
---|---|---|---|---|---|---
ObjectiveId | The internal identifier of the objective associated with the activity. | Number | 18 |  | to an activity and you are not providing other values to identify the objective record. You must choose one of the following options to identify the objective record:  
- ObjectiveId  
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreeText) |  
- ObjectiveId  
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreeText)
ObjectiveFreeText | The objective in free form text as provided by the user. | Text | 80 | A value is required if you are associating a new objective to an activity and you are not providing other values to identify the objective record. You must choose one of the following options to identify the objective record:  
- ObjectiveId  
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreeText) |  
- ObjectiveId  
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreeText)
A value is required if you are associating a new objective to an activity and you are not providing other values to identify the objective record. You must choose one of the following options to identify the objective record:  
- ObjectiveId  
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreeText) |  
- ObjectiveId  
- Combination of ActivityId and (ObjectiveCode or ObjectiveFreeText)
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Activity Objective record</th>
<th>Updating an Existing Activity Objective record</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>to identify the objective record:</td>
<td>to identify the objective record:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• ObjectiveId</td>
<td>• ObjectiveId</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Combination of ActivityId and</td>
<td>• Combination of ActivityId and</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(ObjectiveCode or ObjectiveFree)</td>
<td>(ObjectiveCode or ObjectiveFreefmtText)</td>
</tr>
<tr>
<td>OrigEntityCode</td>
<td>The code indicating the original source of the activity the activity to which the Objective is associated.</td>
<td>Text</td>
<td>30</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the record was created in the Activity Management component, the value is ACTIVITY.</td>
<td>If the record was created in the Activity Management component, the value is ACTIVITY.</td>
<td>If the record was created in the Activity Management component, the value is ACTIVITY.</td>
</tr>
<tr>
<td>OrigEntityNumber</td>
<td>The original unique identifier of the existing task, appointment, or interaction in the source system.</td>
<td>Text</td>
<td>30</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
<td>Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the record was created in the Activity Management component, the value is ACTIVITY.</td>
<td>If the record was created in the Activity Management component, the value is ACTIVITY.</td>
<td>If the record was created in the Activity Management component, the value is ACTIVITY.</td>
</tr>
<tr>
<td>RecurrenceStartD</td>
<td>The start date of an instance of a series..</td>
<td>Date Time</td>
<td>Not applicable</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurrenceOrigEntityNumber</td>
<td>The entity number of the recurring appointment in the original system, to which this activity is related</td>
<td>Text</td>
<td>30</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
</tbody>
</table>
Oracle Sales Cloud
Understanding Import and Export Management

Chapter 9
Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Activity Objective record</th>
<th>Updating an Existing Activity Objective record</th>
</tr>
</thead>
<tbody>
<tr>
<td>RecurSeriesActivityNumber</td>
<td>The activity number of an instance of a series of recurring appointments.</td>
<td>Text</td>
<td>64</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RecurSeriesId</td>
<td>The internal identifier for the series that links instances of a series together.</td>
<td>Number</td>
<td>18</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RelationshipId</td>
<td>This is used to delete recurring instance child records</td>
<td>Number</td>
<td>18</td>
<td>No Validation</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
</tbody>
</table>

You can view the Asset 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.

Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes as shown in the following table:

<table>
<thead>
<tr>
<th>ActivityNumber</th>
<th>ObjectiveCode</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTY_10110</td>
<td>TEST</td>
</tr>
</tbody>
</table>

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

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

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

Reviewing the Import Results

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

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

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

Related Topics

- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Address Data

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

To import Address 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.
Mapping Your Source Data to Oracle Applications Cloud Object Attributes
To import your Address 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.

Prerequisite Setup Tasks
You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Address records, the source system of the Activity Assignee object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the 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.

To add addresses to a party or to update existing address assignments using file-based import, your source file must contain information about the account, contact, or household party to which the address belongs. You map your source file data to the account, contact, or household profile target object and to the address target object.

If you are creating the party and the address assignment in the same import activity, then group the party and address data together in your source file. The import process can import the party, and then identify the party record so that it can import the associated address.

To add an address to an existing party, or to update an existing address record, your source file must include the values that enable the import process to identify the existing records. These values will be source system and source system reference value combination, an Oracle Sales Cloud internal ID, or Public Unique IDs, such as business keys or external IDs.

If the source of your data is an external system, and if you intend to import updates to previously imported records from the external system, then you can provide the source system code and the unique reference value for the source system's record in your source file. The file-based data import process stores a cross-reference between the source system information and Oracle Sales Cloud internal ID. The import process uses the combination of source system and source system reference value to identify the existing record.

- Organization name for organizations
- First name and last name for persons
- Contact information, which is a combination of e-mail Id, mobile number, IM, and URL
- Address information, which is a combination of address1, address2, city, and postal code

You can configure source systems to identify the source of the data that you are importing. Source systems are external sources of data that are used to import data into Oracle Sales Cloud. Oracle Sales Cloud uses source system references to create references between source IDs and the Oracle Sales Cloud database IDs. You can configure source systems either by
using the Manage Trading Community Source System task, or by importing the source system information into Oracle Sales Cloud using the Source System Reference import object.

When the source of your data is not an external system and you do not intend to regularly update the data, you do not need the source system information. To import updates to your existing data, you can export the Oracle Sales Cloud internal ID and add it to your source file. The import process uses the internal ID to identify the existing record.

The preferred option for uniquely identifying an object record is as follows:

- **Internal ID:**
  
  If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Address object, these attributes are:
  
  - `PartyId`
  - `LocationId1`
  - `RelationshipId`

**Required Attributes and Validations**

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validation</th>
<th>Creating an Address record</th>
<th>Updating an Existing Address record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyId</td>
<td>The Oracle Sales Cloud internal ID for the party (account, contact, household, or legal entity) to which the address belongs</td>
<td>Number</td>
<td>18</td>
<td>Identify the party ID value by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Provide reference information to identify the existing party. The reference information can be:</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td>• PartyId (Oracle Sales Cloud internal ID)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• PartyOrigSyst and PartyOrigSyst (source system)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• PartyOrigSystem and PartyOrigSystemReference (source system)</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating an Address record</td>
<td>Updating an Existing Address record</td>
</tr>
<tr>
<td>-----------------</td>
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<td>----------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>PartyNumber</td>
<td>The public unique identifier for the party (account, contact, household, or legal entity) to which the address belongs.</td>
<td>Text</td>
<td>30</td>
<td>Identify the party ID and party number value by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>

- **Conditionally Required:**
  - PartyId (Oracle Sales Cloud internal ID)
  - PartyOrigSyst and PartyOrigSyst (source system code and source system reference values) provided when importing the organization profile.
  - PartyOrgSystem and PartyOrgSystem (source system code and source system reference values) provided when importing the organization profile.

- **Provide reference information to identify the existing party. The reference information can be:**
  - PartyId (Oracle Sales Cloud internal ID)
  - PartyOrigSyst and PartyOrigSyst (source system code and source system reference values) provided when importing the organization profile.

- **Provide reference information to identify the existing party. The reference information can be:**
  - PartyOrgSystem and PartyOrgSystem (source system code and source system reference values) provided when importing the organization profile.
### Attribute | Description | Data Type | Data Length | Prerequisite | Setup Task/Import Validations | Creating an Address record | Updating an Existing Address record |
<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyOrigSystem</td>
<td>The code representing the source system for the party (account, contact, household, or legal entity) to which the address belongs.</td>
<td>Text</td>
<td>30</td>
<td>Conditionally Required</td>
<td>Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in the same batch as this address</td>
<td>Provide reference information to identify the existing party. The reference information can be:</td>
<td>Provide reference information to identify the existing party. The reference information can be:</td>
</tr>
</tbody>
</table>

**PartyOrigSystem**

- **Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in the same batch as this address**

**Conditionally Required**

- **Provide reference information to identify the existing party. The reference information can be:**
  - **PartyId** (Oracle Sales Cloud internal ID)
  - **PartyOrigSystem** and **PartyOrigSystemReference** (source system code and source system reference values) provided when importing the organization profile.
  - **Party Number** (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address

**Updating an Existing Address record**

- **Provide reference information to identify the existing party. The reference information can be:**
  - **PartyId** (Oracle Sales Cloud internal ID)
  - **PartyOrigSystem** and **PartyOrigSystemReference** (source system code and source system reference values) provided when importing the organization profile.
  - **Party Number** (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address
### Attribute: PartyOrigSystemRef
- **Description:** The reference number or text representing the source system unique ID for the party (account, contact, household, or legal entity) to which the address belongs.
- **Data Type:** Text
- **Data Length:** 240
- **Prerequisite Setup Task/Import Validations:** Conditionally Required
- **Creating an Address record for address:** Identify the reference value from your source system that was used when you imported the party in a prior batch, or identify the source system reference that you will use when importing the party in the same batch as this address.
- **Updating an Existing Address record for address:** Provide reference information to identify the existing party. The reference information can be:
  - PartyId (Oracle Sales Cloud internal ID)
  - PartyOrigSystem and PartyOrigSystemReference (source system code and source system reference values) provided when importing the organization profile.
  - Party Number (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address.
  - PartyId (Oracle Sales Cloud internal ID)
  - PartyOrigSystem and PartyOrigSystemReference (source system code and source system reference values) provided when importing the organization profile.
  - Party Number (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address.

### Attribute: Country
- **Description:** The country code component of the postal address.
- **Data Type:** Text
- **Data Length:** 2
- **Prerequisite Setup Task/Import Validations:** Required
- **Creating an Address record:** Identify valid country codes using the Setup and Maintenance, Manage Territories task.
- **Updating an Existing Address record:** The attribute is neither required nor conditionally required.
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/ Import Validations | Creating an Address record | Updating an Existing Address record
--- | --- | --- | --- | --- | --- | ---
LocationId1 | The unique ID for the existing location record in the Oracle Sales Cloud destination table. | Number | 18 | Identify the LOCATION_ID for an existing location by exporting the Location object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task. | The attribute is neither required nor conditionally required | Conditionally Required
| | | | | | | 
LocationOrigSystem1 | A source system code that identifies the original source system of the location. | Text | 30 | Identify the source system code that was used when you imported the location in a prior batch, or identify the source system code you will use when importing | Conditionally required | Conditionally Required
| | | | | | | 
LocationOrigSystem1 and LocationOrigSystemReference1 | | | | | | 
- ObjectKey (Oracle Sales Cloud internal ID)
- LocationOrigSystem1 and LocationOrigSystemReference1 (source system code and source system reference values) provided when importing the organization profile
- Party Number (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address
### Attribute Description Data Type Data Length Prerequisite Setup Task/ Import Validations Creating an Address record Updating an Existing Address record

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Address record</th>
<th>Updating an Existing Address record</th>
</tr>
</thead>
<tbody>
<tr>
<td>LocationOrigSystemReference1</td>
<td>Original System Reference for Location: A source system reference that identifies the unique ID of the location in your legacy or external system.</td>
<td>Text</td>
<td>240</td>
<td>Identify the source system reference that was used when you imported the location in a prior batch, or identify the source system code you will use when importing the location in the same batch as this party relationship to the location.</td>
<td>Conditionally required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is an external system, and if you intend to import updates to previously imported records from the external system, then you can provide the source system code and the unique reference value for the source system’s record in your source file.</td>
<td>Provide reference information to identify the existing party. The reference information can be:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• ObjectKey (Oracle Sales Cloud internal ID)</td>
<td>• ObjectKey (Oracle Sales Cloud internal ID)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• LocationOrigSystem1 and LocationOrigSystemReference1 (source system code and source system reference values) provided when importing the organization profile</td>
<td>• LocationOrigSystem1 and LocationOrigSystemReference1 (source system code and source system reference values) provided when importing the organization profile</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Party Number (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address</td>
<td>• Party Number (public unique identifier for an organization profile), which is PARTY_SITE_NUMBER for address</td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating an Address record</td>
<td>Updating an Existing Address record</td>
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<td>-------------</td>
<td>--------------------------------------------</td>
<td>-----------------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>TransliterationLang</td>
<td>The language considered as the local language for the location</td>
<td>String</td>
<td>Not applicable</td>
<td>Identify valid language codes using the Setup and Maintenance, Manage ISO Languages task.</td>
<td>A value is required if you are providing address elements in a translated language.</td>
<td>A value is required if you are providing address elements in a translated language.</td>
</tr>
<tr>
<td>Identifying AddressFlag</td>
<td>Indicates that an address is the primary address for a party.</td>
<td>Text</td>
<td>1</td>
<td>None</td>
<td>A value is required if you're adding or updating an address association and where the import default value or lack of a value in the source file results in no address being identified as the primary address for the party.</td>
<td>A value is required if you’re adding or updating an address association and where the import default value or lack of a value in the source file results in no address being identified as the primary address for the party.</td>
</tr>
<tr>
<td>RelationshipId</td>
<td>The unique identifier for the existing party relationship record in the Oracle Sales Cloud destination table. The relationship</td>
<td>Number</td>
<td>18</td>
<td>Identify the relationship ID for an existing relationship by exporting the Relationship and Organization Contact objects using the</td>
<td>A value is required if you're adding an address association to an existing party relationship or updating an existing address</td>
<td>A value is required if you’re adding an address association to an existing party relationship or updating an existing address</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating an Address record</td>
<td>Updating an Existing Address record</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>-------------------------------------------</td>
<td>-----------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>RelOrigSystem</td>
<td>The source system code that identifies the original source system of the party relationship.</td>
<td>Text</td>
<td>30</td>
<td>Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>association record for a relationship, and you’re not providing the relationship’s source system reference (RelOrigSystemReference) and the source system code (RelOrigSystem).</td>
<td>association record for a relationship, and you’re not providing the relationship’s source system reference (RelOrigSystemReference) and the source system code (RelOrigSystem).</td>
</tr>
<tr>
<td>RelOrigSystemReference</td>
<td>The ID that identifies the party relationship in your legacy or external system.</td>
<td>Text</td>
<td>240</td>
<td>None</td>
<td>A value is required if you’re adding an address association to an existing party relationship and you’re not providing the relationship ID, or if you’re importing the relationship in the same import batch and you’re using the source system reference and source system code to relate the source file data.</td>
<td>A value is required if you’re adding an address association to an existing party relationship and you’re not providing the relationship ID, or if you’re importing the relationship in the same import batch and you’re using the source system reference and source system code to relate the source file data.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task.Import Validations</td>
<td>Creating an Address record</td>
<td>Updating an Existing Address record</td>
</tr>
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<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
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<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>The employee resource’s e-mail.</td>
<td>Text</td>
<td>320</td>
<td>Identify the e-mail ID for an existing resource using the Resource Directory or the Setup and Maintenance, Manage Resources task. You can also obtain the e-mail address by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>A value is required if you're adding an address association to an existing party relationship and you're not providing the relationship ID, or if you're importing the relationship in the same import batch and you're using the source system reference and source system code to relate the source file data.</td>
<td>A value is required if you're adding an address association to an existing party relationship and you're not providing the relationship ID, or if you're importing the relationship in the same import batch and you're using the source system reference and source system code to relate the source file data.</td>
</tr>
<tr>
<td>SiteOrigSystem</td>
<td>A source system code that identifies the original source system of the address association (party site).</td>
<td>Text</td>
<td>30</td>
<td>None</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>A value is required if you're updating a previously imported address association, where you provided a SiteOrigSystem value, and you're not providing the address association ID (ObjectKey), or if you're importing associated objects, such as contact preferences and site use, and are using the source system reference and source system code to relate the source file data.</td>
</tr>
<tr>
<td>SiteOrigSystemRefer</td>
<td>A source system reference that identifies the unique ID of the address association</td>
<td>Text</td>
<td>240</td>
<td>None</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>A value is required if you're updating a previously imported address association.</td>
</tr>
</tbody>
</table>
## Attribute Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Address record</th>
<th>Updating an Existing Address record</th>
</tr>
</thead>
<tbody>
<tr>
<td>(party site) in your legacy or external system.</td>
<td>Identify the party site ID for an existing address association by exporting the Party Site object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>A value is required if you're updating a previously imported address association, where you provided a SiteOrigSystem value, and you're not providing the address association ID (ObjectKey), or if you're importing associated objects, such as contact preferences and site uses, and are using the source system reference and source system code to relate the source file data.</td>
<td><strong>ObjectKey</strong></td>
<td>The unique ID for the existing address association record (party site) in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
</tr>
</tbody>
</table>

You can view the Asset 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.
Creating Source CSV File for Import
The .csv file is provided as input to the file-based data import process. You must populate the .csv file with the data you want to import into Oracle Applications Cloud.

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

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

If the Party number attribute is specified in the source csv file while creating Account, Contact, or Household objects, use the sample CSV file as shown in the following table:

<table>
<thead>
<tr>
<th>PartyNumber</th>
<th>AddressNumber</th>
<th>Address1</th>
<th>Address2</th>
<th>Address3</th>
<th>City</th>
<th>State</th>
<th>PostalCode</th>
<th>Country</th>
<th>PrimaryFlag</th>
<th>AddressType</th>
</tr>
</thead>
<tbody>
<tr>
<td>StdAcct4AL CDRM_567 100</td>
<td></td>
<td>Oracle Parkway</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SELL_TO</td>
</tr>
<tr>
<td>StdAcct4AL CDRM_567 101</td>
<td></td>
<td>Oracle Parkway</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>SELL_TO</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

Related Topics
- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Asset Data

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

To import asset records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your asset 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

Prerequisite Setup Tasks
You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your asset records, the source system of the Asset object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

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

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

• **Public unique identifiers**: If you are 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 Asset object, the attribute is ProdGroupNumber.

• **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with “id” in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Asset object, these attributes are as follows:
  - AssetId
  - CustomerId
  - InventoryItemId
  - InventoryOrgId
  - ProdGroupld

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Asset record</th>
<th>Updating an Existing Asset record</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssetNumber</td>
<td>The unique ID for the existing asset record in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
<td>18</td>
<td>None</td>
<td>Required</td>
<td>Required</td>
</tr>
</tbody>
</table>
Understanding Import and Export Management

Chapter 9
Importing Your Data

### Attribute

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Asset record</th>
<th>Updating an Existing Asset record</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssetOrigSystem</td>
<td>A source system code that identifies the original source system of the asset.</td>
<td>Text</td>
<td>30</td>
<td>None</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>AssetOrigSystemRef</td>
<td>A source system reference that is the unique ID of the asset in your legacy or external system.</td>
<td>Text</td>
<td>255</td>
<td>None</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>CustomerId</td>
<td>The unique ID for the existing customer party record in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
<td>18</td>
<td>The party must exist.</td>
<td>Required</td>
<td>Not required</td>
</tr>
</tbody>
</table>

You can view the Asset 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.

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes. In the following sample source file, the import .csv file uses original system reference information from legacy system to identify the asset and the customer. A value is provided for ProdGroupInternalName to identify the product group.

<table>
<thead>
<tr>
<th>AssetName</th>
<th>AssetNum</th>
<th>AssetOrig System</th>
<th>AssetOrig SystemRef</th>
<th>CostDocArr</th>
<th>PURCHASE CUST_OS DATE</th>
<th>CUST_OS</th>
<th>EnteredCun</th>
<th>Quantity</th>
<th>Status Code</th>
<th>ProdGroupInternalName</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssetName20150204030315.1</td>
<td>AssetNum20150204030315.1</td>
<td>Siebel CRM</td>
<td>osr_osr_20150204030315.1</td>
<td>03/10/2017 SIEBEL</td>
<td>1-2LF GBP 101</td>
<td>ACTIVE</td>
<td>WAVE_Electronics</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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. Sign in as a setup user.
2. In the Navigator, under **Tools**, click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Asset** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required .csv file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page edit the attribute mappings if required, and click **Next**.

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

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

Reviewing the Import Results

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

1. Sign in as a setup user.
2. In the Navigator, under **Tools**, click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.
Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Related Topics
- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Asset Contact Data

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

To import asset contact records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your asset 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Asset Contact records, the source system of the Asset Contact object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.
The preferred option for uniquely identifying an object record is through the Internal ID of the record. If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Asset Contact object, these attributes are as follows:

- Contact Party ID
- Asset ID
- Asset Number

### Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Asset Contact record</th>
<th>Updating an Existing Asset Contact record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ContactPartyId</td>
<td>Unique party identifier representing a contact</td>
<td>Number</td>
<td>18</td>
<td>The party must exist</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>AssetId</td>
<td>The unique ID for the existing asset record in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
<td>18</td>
<td>An asset record with the Asset ID should exist</td>
<td>Conditionally required when you do not provide the Asset Number</td>
<td>Conditionally required when you do not provide the Asset Number</td>
</tr>
<tr>
<td>AssetNumber</td>
<td>The unique ID for the existing asset record in the Oracle Sales Cloud destination table.</td>
<td>Varchar2</td>
<td>100</td>
<td>An asset record with the Asset Number should exist</td>
<td>Conditionally required when you do not provide the Asset ID</td>
<td>Conditionally required when you do not provide the Asset ID</td>
</tr>
<tr>
<td>CustomerIdContactFunctionCode</td>
<td>Contact's Function in the Asset Contact Team Function of contact on the asset. This field would refer to lookup type for contact role</td>
<td>Varchar2</td>
<td>30</td>
<td>Contact Function Code should exist in Lookup Type for Contact Role - 'ORA_ZCM_CONTACT_FUNCTION' The party must exist.</td>
<td>Not Required</td>
<td>Not required</td>
</tr>
</tbody>
</table>

You can view the Asset 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.
Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes. In the following sample source file, the import .csv file uses the Asset Number to identify the asset and the Contact Party Id to identify the Contact.

<table>
<thead>
<tr>
<th>AssetNumber</th>
<th>ContactPartyId</th>
<th>ContactFunctionCode</th>
</tr>
</thead>
<tbody>
<tr>
<td>900546</td>
<td>300000018487543</td>
<td>ORA_ZCM_ASSET_MANAGER</td>
</tr>
<tr>
<td>900604</td>
<td>300000018487544</td>
<td>ORA_ZCM_MAINTENANCE_ENGINEEER</td>
</tr>
</tbody>
</table>

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

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

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

Reviewing the Import Results

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

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

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

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

Related Topics

• File Import: How It Works
• Importing Data from a File: Procedure
• File Based Data Import for Oracle Sales Cloud

Importing Your Asset Team Member Data

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

To import asset contact records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

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

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

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

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Asset Team Member records, the source system of the Asset Team Member object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.
Options to Uniquely Identify the Records

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

The preferred option for uniquely identifying an object record is as follows:

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

Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Asset Team Member record</th>
<th>Updating an Existing Asset Team Member record</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssetId</td>
<td>The unique ID for the existing asset record in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
<td>18</td>
<td>An asset record with the Asset ID should exist</td>
<td>Conditionally required when you do not provide the Asset Number</td>
<td>Conditionally required when you do not provide the Asset Number</td>
</tr>
<tr>
<td>AssetNumber</td>
<td>The unique ID for the existing asset record in the Oracle Sales Cloud destination table.</td>
<td>Varchar2</td>
<td>100</td>
<td>An asset record with the Asset Number should exist</td>
<td>Conditionally required when you do not provide the Asset Number</td>
<td>Conditionally required when you do not provide the Asset ID</td>
</tr>
<tr>
<td>Function</td>
<td>Team Member’s Function in the Asset Team</td>
<td>Varchar2</td>
<td>30</td>
<td>Team Member Function Code should exist in Lookup Type for Team Member Role - 'ORA_ZCM_TEAM_FUNCTION'</td>
<td>Not Required</td>
<td>Not required</td>
</tr>
<tr>
<td>Resource Party ID</td>
<td>Unique party identifier</td>
<td>Number</td>
<td>18</td>
<td>The party must exist.</td>
<td>Required</td>
<td>Required</td>
</tr>
</tbody>
</table>
### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes. In the following sample source file, the import .csv file uses the Asset Number to identify the asset and Resource Party ID to identify the contact.

<table>
<thead>
<tr>
<th>AssetNumber</th>
<th>ResourceId</th>
<th>MemberFunctionCode</th>
</tr>
</thead>
<tbody>
<tr>
<td>100001</td>
<td>30000018487547</td>
<td>ORA_ZCM_PRODUCT_EXPERT</td>
</tr>
<tr>
<td>100002</td>
<td>30000018487548</td>
<td>ORA_ZCM_SUPPORTED_ENGINEER</td>
</tr>
</tbody>
</table>

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

**Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. In the Create Import Activity: Review and Submit page, click Submit.

Reviewing the Import Results

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

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

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

Related Topics
- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Attachment Data

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

To import Attachment records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

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

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

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

Prerequisite Setup Tasks
You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Attachment records, the source system of the Attachment object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

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

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

• **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. It uses the Account or Contact Primary Key to attach files.
  
  • **Public unique identifiers** If you are 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. The PUIDs are as follows
    
    - For the Lead object, the attribute is LeadNumber.
    - For the Opportunity object, the attribute is OptyNumber.
    - For the Account object, the attribute is AccountNumber.

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Attachment record</th>
<th>Updating an Existing Attachment record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PK1Value</td>
<td>This is the primary key of the record to which the attachment is being associated.</td>
<td>Varchar</td>
<td>150</td>
<td>When creating or updating attachments, the parent record to which the attachment is associated must exist in the database.</td>
<td>Either PK1Value or PUID is mandatory.</td>
<td>Either PK1Value or PUID is mandatory.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Attachment record</td>
<td>Updating an Existing Attachment record</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td>ObjectPUID</td>
<td>This is the public unique identifier of the record to which the attachment is being associated.</td>
<td>Varchar</td>
<td>100</td>
<td>When creating or updating attachments, the parent record to which the attachment is associated must exist in the database.</td>
<td>Either Pk1Value or PUID is mandatory.</td>
<td>Either Pk1Value or PUID is mandatory.</td>
</tr>
<tr>
<td>Category</td>
<td>Category to which the attachment belongs. If you do not specify a value, the default is considered. For example, the default attachment category for lead is MKL_LEADCATEGORY. A source system reference that is the unique ID of the Attachment in your legacy or external system.</td>
<td>Varchar</td>
<td>30</td>
<td>If passing the category, it should be a valid category for that object.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the attachment.</td>
<td>Varchar</td>
<td>255</td>
<td>This can be any string of specified length.</td>
<td>Not Required</td>
<td>Not required</td>
</tr>
<tr>
<td>FileName</td>
<td>Name of the attachment file in which the attachment is stored.</td>
<td>Varchar</td>
<td>2048</td>
<td>This can be any string of specified length.</td>
<td>Either the File name or the URL is mandatory.</td>
<td>Either the File name or the URL is mandatory.</td>
</tr>
<tr>
<td>PK2 Value</td>
<td>This is the primary key of the record to which the attachment is being associated.</td>
<td>Varchar</td>
<td>150</td>
<td>This is useful when the object has a composite primary key.</td>
<td>This is useful when the object has a composite primary key.</td>
<td>This is useful when the object has a composite primary key.</td>
</tr>
<tr>
<td>PK3 Value</td>
<td>This is the primary key of the record to which the attachment is being associated.</td>
<td>Varchar</td>
<td>150</td>
<td>This is useful when the object has a composite primary key.</td>
<td>This is useful when the object has a composite primary key.</td>
<td>This is useful when the object has a composite primary key.</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating an Attachment record | Updating an Existing Attachment record
--- | --- | --- | --- | --- | --- | ---
PK4 Value | This is the primary key of the record to which the attachment is being associated. | Varchar | 150 | This is useful when the object has a composite primary key. | This is useful when the object has a composite primary key. | This is useful when the object has a composite primary key. |
PK5 Value | This is the primary key of the record to which the attachment is being associated. | Varchar | 150 | This is useful when the object has a composite primary key. | This is useful when the object has a composite primary key. | This is useful when the object has a composite primary key. |
Title | Specifies the title of the attachment that is displayed in the UI. | Varchar | 80 | This can be any valid string of specified length. | Not Required | Not Required |
URL | If the attachment type is url, this specifies the url. | Varchar | 4000 | The URL format is validated. | Either the file name or the URL is mandatory. | Either the file name or the URL is mandatory. |

You can view the Attachment 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.

### Creating Source CSV File for Import

The .csv file is provided as input to the file-based data import process. You must populate the .csv file with the data you want to import into Oracle Applications Cloud.

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

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

You must edit the template CSV file and provide valid values for the required attributes. This is an example CSV file that attaches files to the records whose PUIDs are CDRM_704225, CDRM_704226, CDRM_704227, CDRM_704228, and CDRM_704229 respectively. These PUID values originate from the parent object records to which the attachment files are associated. For example if you’re running an attachment import for **Account**, then these PUID values would be the **AccountNumber** attribute on the records from the **Account** object. You can attach different types of files, giving each file a specific description.
Creating 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. Download the attachment template.
2. In the template, create one line for each attachment you want to import. Each line must point to the PUID of the record and the name of the file/URL you’re attaching.
3. Save the CSV file locally. Name the file as Attachment.csv.
4. Create a .zip file that contains the Attachment.csv file and each of the files you’re importing. Include every file you specified in the Attachment.csv file in the .zip archive.
5. In the Navigator, under Tools, click Import Management.
6. On the Manage Imports page, click Create Import Activity.
7. In the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Activity from the Object drop-down list.
8. From the Attachments drop down, select the object you’re importing.
9. In File Name, browse and select the .zip file, and click Next.
10. 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.

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

Reviewing 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

- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Classification Data

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

To import Classification records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Classification 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Classification records, the source system of the Classification object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.
The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you are 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 Classification object, the attribute is FileRecordNum.

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

### Required Attributes and Validations

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ClassificationCategory</td>
<td>The classification category name</td>
<td>Text</td>
<td>30</td>
<td>The value must exist in the column HZ_CLASS_ CATEGORIES of the HZ_CLASS_ CATEGORIES table. The category entity assignment definition must allow the category to be assigned to the party. You can view classification category names and entity assignment rules using the Manage Classification Categories, Setup and Maintenance task.</td>
<td>Conditionally required</td>
<td>Not Required</td>
</tr>
</tbody>
</table>

126
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ClassificationCode</td>
<td>The classification code, within the classification category, assigned to the party.</td>
<td>Text</td>
<td>30</td>
<td>Conditionally required</td>
<td>A value is required if creating a new classification association record.</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ClassificationOrigSys</td>
<td>A source system code that identifies the original source system of the classification association. Provide the source system reference (CLASSIFIC_ORIG_SYS and the source system code (CLASSIFIC_ORIG_SYS and the source system code (CLASSIFIC_ORIG_SYS and the source system code (CLASSIFIC_</td>
<td>Text</td>
<td>30</td>
<td>Conditionally required</td>
<td>A value is required if creating a previously imported classification association, where you provided a ClassificationOrigSystemReference value, and you are not providing the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating a Classification record</td>
<td>Updating an Existing Classification record</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ClassificationOrigSys</td>
<td>A source system reference that identifies the unique ID of the classification association in your legacy or external system. Provide the source system reference.</td>
<td>Text</td>
<td>240</td>
<td>Conditionally required</td>
<td>A value is recommended if creating a classification association, where the source of your data includes a reference value</td>
<td>A value is required if updating a previously imported classification association, where you provided a value</td>
</tr>
</tbody>
</table>

External system. The import process uses the source system code and source system reference values to:

- Create an association between the source system values and the unique Oracle Fusion ID (CODE_ASSIGNMENT_ID) when you import a new classification association.
- Find the Oracle Fusion ID (CODE_ASSIGNMENT_ID) when you import updates to a previously imported classification association record and do not supply the Oracle Fusion ID value.
- Find the Oracle Fusion ID (CODE_ASSIGNMENT_ID) when you import updates to a previously imported classification association record and do not supply the Oracle Fusion ID value.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>(CLASSIFIC_ORIG_SYSTEM and the source system code (CLASSIFIC_ORIG_SYSTEM) when the source of your data is your legacy or external system. The import process uses the source system code and source system reference values to:</td>
<td></td>
<td></td>
<td></td>
<td>• Create an association between the source system values and the unique Oracle Fusion ID (CODE_ASSIGNMENT_ID) when you import a new classification association.</td>
<td></td>
<td>ClassificationOrigSystemReference value, and you are not providing the record’s unique ID (ObjectKey).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Find the Oracle Fusion ID (CODE_ASSIGNMENT_ID) when you import updates to a previously imported classification association record and do not supply the Oracle Fusion ID value.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ObjectKey</th>
<th>The unique ID for the existing classification association record in the Oracle Fusion destination table.</th>
<th>Number</th>
<th>If providing a value and updating an existing classification association, the value must</th>
<th>Optional</th>
<th>Conditionally required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>18</td>
<td></td>
<td></td>
<td>A value is required if you are updating an existing</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating a Classification record | Updating an Existing Classification record
--- | --- | --- | --- | --- | --- | ---
EndDate | The date when the classification code assignment is no longer valid. | Date | None | If provided, the value must be later than or equal to the START_DATE_ACTIVE value. | Optional | Optional
PrimaryFlag | Indicates that the classification code is the primary classification code for the party. | Text | 1 | If provided, valid values are Y and N. A classification category can only have one primary classification code within a date range. | Optional | Optional
Rank | Number indicating the ranking order of the classification category associated with the party. | Number | None | No validation | Optional | Optional
StartDate | The date when the classification code validity begins for the party. | Date | None | No validation | Optional | Optional
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyId</td>
<td>The unique ID for the existing party record in the Oracle Fusion destination table.</td>
<td>Number</td>
<td>18</td>
<td>Do not provide a value if creating a new party in the same import batch as this classification association. If you provide the value for an existing party, the value must exist in the column PARTY_ID of the HZ_PARTIES table. You can obtain the PARTY_ID for an existing party by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally required</td>
<td>Conditionally required</td>
</tr>
<tr>
<td>PartyOrigSystem</td>
<td>The source system code that identifies the original source system of the party. Provide the source system reference (PARTY_ORIG_SYS1) and the source system code (PARTY_ORIG_SYS1) when the source of your data is your legacy or external system. The import process uses the source system code and source system reference values to:</td>
<td>Text</td>
<td>30</td>
<td>If providing a value and importing a new party in the same import batch as this classification association, the value must be part of a unique combination of the source system reference (PARTY_ORIG_SYSTEM_REFERENCE) and the source system code (PARTY_ORIG_SYSTEM) in the HZ_IMP_PARTIES table. If providing a value for an existing party, the combination of source system reference values for the party profile target object (GroupProfile, OrganizationProfile, PersonProfile).</td>
<td>Conditionally required</td>
<td>Conditionally required</td>
</tr>
</tbody>
</table>
Chapter 9
Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyOrigSystemReference</td>
<td>The ID that identifies the party in your legacy or external system. Provide the source system reference (PARTY_ORIG_SYS) and the source system code (PARTY_ORIG_SYS) when the source of your data is your legacy or external system. The import process uses the source system code and source</td>
<td>Text</td>
<td>240</td>
<td>Conditionally required</td>
<td>If adding a classification to an existing party, provide either the PartyID or the PartyOrigSystem and PartyOrigSystemReference values for the party profile target object (GroupProfile, OrganizationProfile, PersonProfile).</td>
<td>If updating a classification to an existing party, provide either the PartyID or the PartyOrigSystem and PartyOrigSystemReference values for the party profile target object (GroupProfile, OrganizationProfile, PersonProfile).</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating a Classification record</td>
<td>Updating an Existing Classification record</td>
</tr>
<tr>
<td>-----------</td>
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<td>-------------------------------------------</td>
<td>----------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>system reference values to:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Find the Oracle Fusion ID (PARTY_ID) for the new party imported with the source system reference and source system code values in the same batch as this party classification.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Find the Oracle Fusion ID (PARTY_ID) that uniquely identifies the existing party record that was originally imported with the source system reference and source system code values in a prior batch.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ActionFlag**

- Indicates whether an existing record must be updated or if no matching record exists, created new in the destination table.

- For internal use only.

- Do not provide a value.

- Not required

- Not required
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>BatchId</td>
<td>The ID of the batch of records to which the classification assignment belongs.</td>
<td>Number</td>
<td>18</td>
<td>The combination of BATCH_ID and INTERFACE_ROW_ID must be unique. The combination of BATCH_ID and CLASSIFIC_T_ID must be unique.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ClassificTId</td>
<td>The interface table row's unique ID.</td>
<td>Number</td>
<td>18</td>
<td>The combination of BATCH_ID and CLASSIFIC_T_ID must be unique.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ErrorId</td>
<td>The ID reference to an import error.</td>
<td>Number</td>
<td>18</td>
<td>For internal use only.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>FileRecordNum</td>
<td>A number that identifies the corresponding source file record for file-based data import</td>
<td>Number</td>
<td>10</td>
<td>For internal use only.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ImportStatusCode</td>
<td>The import status. The values are:</td>
<td>Text</td>
<td>30</td>
<td>For internal use only.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td></td>
<td>• A value of I indicates a successful import from the source file to the interface table.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• A value of S indicates successful import from the interface table to the</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating a Classification record | Updating an Existing Classification record
--- | --- | --- | --- | --- | --- | ---
| **InsertUpdateFlag** | Indicates the operation to be performed on a row | Text | 1 | Valid values are I and U. The value must have the same value as the ACTION_FLAG column. | Not required | Not required

- **I** to create a new record in the destination tables
- **U** to update an existing record in the destination table

| **InterfaceStatus** | The import status. The values are: | Text | 30 | For internal use only. Do not provide a value. | Not required | Not required

- A value of **I** indicates a successful import from the source file record to the interface table.
- A value of **E** indicates an error occurred importing from the interface table to the destination table.
- A value of **D** indicates a duplicate.
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating a Classification record</th>
<th>Updating an Existing Classification record</th>
</tr>
</thead>
<tbody>
<tr>
<td>source file to the interface table.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A value of S indicates successful import from the interface table to the destination table.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A value of X indicates an error occurred importing the source file record to the interface table.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A value of E indicates an error occurred importing from the interface table to the destination table.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A value of D indicates a duplicate.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can view the Classification 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.

Creating Source CSV File for Import

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

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

You must edit the template .csv file and provide valid values for the required attributes as shown in the table below

<table>
<thead>
<tr>
<th>PartyNumber</th>
<th>PartyId</th>
<th>ClassCategory</th>
<th>ClassCode</th>
<th>PrimaryFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDRM_704225</td>
<td>300100128825019</td>
<td>Aux1</td>
<td>1000</td>
<td>Y</td>
</tr>
</tbody>
</table>

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

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

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

Reviewing the Import Results

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

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

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

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

The contact object has the following child objects:

- Address
- Classification
- Relationship
- Sales Team Member

To import contact records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

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

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them. Also, when importing a child record, ensure that its parent record exists in the database.
Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is using the public unique identifier: If you are creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record.

Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup</th>
<th>Creating a Contact Record</th>
<th>Updating an Existing Contact Record</th>
<th>Deleting an Existing Contact Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartyNumber</td>
<td>The public unique identifier of the contact.</td>
<td>No prerequisite tasks</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>FirstName</td>
<td>First name of a person party.</td>
<td>No prerequisite tasks</td>
<td>Required</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>LastName</td>
<td>Last name of a person party.</td>
<td>No prerequisite tasks</td>
<td>Required</td>
<td>Not required</td>
<td>Not required</td>
</tr>
</tbody>
</table>

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

Creating Source CSV File for Import

The CSV file is provided as source 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 create a CSV file on your own or by using a predefined template. To download a preexisting template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Manage Object Details page.
3. Click the object name link under the Display Name column to navigate to the Manage Mapping page.
4. If you don’t have an existing mapping, then click the Create Import Mapping button to create a mapping.
5. On the Edit Import Mapping page, map the required by dragging them from the Target Attributes section to the Source File section. Save the mapping when you are done.
6. Click the link in the Mapping Number column of the required mapping.
Note: You can filter the mappings using the Find drop-down list.

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

You must edit the template CSV file and provide valid values for the required attributes. The following is an example of a CSV file for the Contact object.

<table>
<thead>
<tr>
<th>PartyNumber</th>
<th>Address1</th>
<th>Address2</th>
<th>City</th>
<th>State</th>
<th>FirstName</th>
<th>LastName</th>
<th>OwnerParty</th>
<th>SourceSystem</th>
<th>SourceSystemReferenceValue</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact_1823894</td>
<td>212</td>
<td>Suite 10</td>
<td>Foster</td>
<td>CA</td>
<td>Dennis</td>
<td>Peattie</td>
<td>Party_72313</td>
<td>CSV</td>
<td>CON_TST_OSRI_1</td>
<td>US</td>
</tr>
<tr>
<td>Contact_6546546</td>
<td>Vision Corporation</td>
<td>Vision Corporation</td>
<td>Palo Alto</td>
<td>CA</td>
<td>Steve</td>
<td>Braun</td>
<td>Party_46579</td>
<td>DNB</td>
<td>CON_TST_OSRI_1</td>
<td>US</td>
</tr>
</tbody>
</table>

Creating the Import Activity
To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. To create an import activity, do the following:

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

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

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

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

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

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

To import opportunity records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

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

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity competitor, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is using the public unique identifier. If you're creating records, then you can provide a user-friendly public unique identifier (attributes denoted with "Number" and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Opportunity Record</th>
<th>Updating an Existing Opportunity Record</th>
<th>Deleting an Existing Opportunity Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit ID</td>
<td>The business unit that owns the opportunity transaction. If a value is not provided, then the business unit ID is set to a default value based on the signed in user details.</td>
<td>Not applicable</td>
<td>Required</td>
<td>Do not provide</td>
<td>Do not provide</td>
</tr>
<tr>
<td>Name</td>
<td>Opportunity Name - The name that identifies the opportunity.</td>
<td>Not applicable</td>
<td>Required</td>
<td>Required</td>
<td>The attribute is neither required nor conditionally required.</td>
</tr>
<tr>
<td>OptyId</td>
<td>Opportunity ID - The unique ID for the existing opportunity record in the Oracle Sales Cloud destination table.</td>
<td>You can obtain the OptyID for an existing opportunity by exporting the Opportunity object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyNumber</td>
<td>The public unique identifier of the opportunity.</td>
<td>Not applicable</td>
<td>Conditionally Required</td>
<td>Do not provide,</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>

*Note:* The profile options MOO_CLOSE_COMP_REQD and MOO_CLOSE_WINLOSS_REQD can be configured to enforce the Competitor and Winloss Reason Code to be required if the Status is closed.

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

### Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity object row and click the Download icon.
4. Save the Opportunity_Templates ZIP file to a location on your desktop.

You must edit the Opportunity.CSV file and provide valid values for the required attributes.

Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Opportunity from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the Map Fields page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click Next.
6. Click the Validate Data button to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. On the Review and Submit page, click Submit.

Reviewing the Import Results

You can review the import results by checking for the import activity on the Manage Import Activity page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click the All Imports infotile. 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.

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

Related Topics

- Managing Import Mappings
- Importing Data: Procedure

Importing Your Opportunity Competitor Data

Use this topic to import opportunity competitor data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete opportunity competitor records.
To import opportunity competitor records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source comma-separated values (CSV) file for import.
3. Create the import activity.
4. Review the import results.

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your opportunity competitor data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity competitor, ensure that its parent opportunity exists in the database. If the parent record doesn’t exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Competitor object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Opportunity Competitor Record</th>
<th>Updating an Existing Opportunity Competitor Record</th>
<th>Deleting an Existing Opportunity Competitor Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptyCompetitorId</td>
<td>The unique identifier for Competitors of the Opportunity, that</td>
<td>Not Applicable</td>
<td>Do not provide</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>
You can view the Opportunity Competitor object along with all its child objects and attributes in the Manage Import Objects page of the Import Objects tab. You can find attribute information like type, length, description, and so on, on this page.

Creating Source CSV File for Import

The CSV file is provided as the source 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 the templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Competitor object row and click the Download icon.
4. Save the Opportunity Competitor_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Competitor.CSV file and provide valid values for the required attributes.

Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity, do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select Opportunity Competitor from the **Object** drop-down list.

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

5. On the **Map Fields** page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click **Next**.

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

7. On the **Review and Submit** page, click **Submit**.

**Reviewing the Import Results**

You can review the import results by checking for the import activity on the **Manage Import Activity** page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click **Tools > Import Management**.

2. On the **Manage Imports** page, click the **All Imports** infotile. 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**.

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

**Related Topics**

- Managing Import Mappings
- Importing Data: Procedure

**Importing Your Opportunity Contact Data**

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

To import opportunity contact records, perform the following tasks:

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

**Mapping Your Source Data to Oracle Applications Cloud Object Attributes**

To import your opportunity contact data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity contact, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Contact object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Creating an Opportunity Contact Record</th>
<th>Updating an Existing Opportunity Contact Record</th>
<th>Deleting an Existing Opportunity Contact Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptyId</td>
<td>The unique ID for the existing opportunity record in the Oracle Sales Cloud destination table.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td>You can obtain the OptyID for an existing opportunity by exporting the Opportunity object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Either OptyId or OptyNumber is required.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>You can use TargetPartyID to associate the Account if you are assigning Account Contact as the Primary Contact of Opportunity.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OptyNumber</td>
<td>The public unique identifier of the opportunity.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td>Not applicable.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Either OptyId or OptyNumber is required.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## You can view the Opportunity Contact object along with all its child objects and attributes in the Manage Import Objects page of the Import Objects tab. You can find attribute information like type, length, description, and so on, on this page.

### Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Contact object row and click the Download icon.
4. Save the Opportunity Contact_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Contact.CSV file and provide valid values for the required attributes.

### Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Opportunity Contact from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the Map Fields page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click Next.
6. Click the Validate Data button to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. On the Review and Submit page, click Submit.

### Reviewing the Import Results

You can review the import results by checking for the import activity on the Manage Import Activity page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click the All Imports infotile. 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.
Note: On this page, you can also view quickly the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Related Topics
- Managing Import Mappings
- Importing Data: Procedure

Importing Your Opportunity Lead Data

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

To import opportunity lead 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.

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your opportunity lead data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity lead, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s...
UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Lead object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

### Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Precondition Setup Tasks or Import Validation</th>
<th>Creating an Opportunity Lead Record</th>
<th>Updating an Existing Opportunity Lead Record</th>
<th>Deleting an Existing Opportunity Lead Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptyLeadId</td>
<td>The unique identifier of the opportunity lead.</td>
<td>Not applicable</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyId</td>
<td>The unique ID for the existing opportunity record in the Oracle Sales Cloud destination table.</td>
<td>You can obtain the OptyId for an existing opportunity by exporting the Opportunity object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyNumber</td>
<td>The opportunity’s public unique identifier value.</td>
<td>Not applicable</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>LeadNumber</td>
<td>The lead’s unique identifier value.</td>
<td>You can obtain the Lead Number for an existing lead registration using the Lead registration work area.</td>
<td>Required</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>

To identify the existing lead relationship record, provide either the Oracle Sales Cloud record ID (OptyLeadId), or provide the lead number (LeadNumber) and the opportunity’s Oracle Sales Cloud record ID (OptyId), or provide the lead number (LeadNumber) and the opportunity number (OptyNumber).
You can view the Opportunity Lead object along with all its child objects and attributes in the Manage Import Objects page of the Import Objects tab. You can find attribute information like type, length, description, and so on, on this page.

Creating Source CSV File for Import
The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Lead object row and click the Download icon.
4. Save the Opportunity Lead_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Lead.CSV file and provide valid values for the required attributes.

Creating the Import Activity
To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Opportunity Lead from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the Map Fields page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click Next.
6. Click the Validate Data button to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. On the Review and Submit page, click Submit.

Reviewing the Import Results
You can review the import results by checking for the import activity on the Manage Import Activity page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click the All Imports infotile. 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.

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

Related Topics
- Managing Import Mappings
- Importing Data: Procedure
Importing Your Opportunity Partner Data

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

To import opportunity partner records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your opportunity partner data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity partner, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Partner object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

Required Attributes and Validations

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. The following table lists the required attributes for importing new opportunity partner records, required attributes for updating opportunity partner records, prerequisite setup tasks for the attributes, and specific validations, if any, for opportunity partner import:
### Attribute Description  
#### Creating an Opportunity Partner Record  
#### Updating an Existing Opportunity Partner Record  
#### Deleting an Existing Opportunity Partner Record

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Opportunity Partner Record</th>
<th>Updating an Existing Opportunity Partner Record</th>
<th>Deleting an Existing Opportunity Partner Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartOrgPartyId</td>
<td>The party identifier of a partner.</td>
<td>Not applicable</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>OptyId</td>
<td>The unique ID for the existing opportunity record in the Oracle Sales Cloud destination table.</td>
<td>You can obtain the OptyId for an existing opportunity by exporting the Opportunity object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Either OptyId or OptyNumber is required.</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyNumber</td>
<td>The public unique identifier of the opportunity.</td>
<td>Not applicable</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>

You can view the Opportunity Partner object along with all its child objects and attributes in the Manage Import Objects page of the Import Objects tab. You can find attribute information like type, length, description, and so on, on this page.

### Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Partner object row and click the Download icon.
4. Save the Opportunity Partner_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Partner.CSV file and provide valid values for the required attributes.

### Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Opportunity Partner from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the **Map Fields** page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click **Next**.

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

7. On the **Review and Submit** page, click **Submit**.

### Reviewing the Import Results

You can review the import results by checking for the import activity on the **Manage Import Activity** page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click **Tools > Import Management**.
2. On the **Manage Imports** page, click the **All Imports** infotile. 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**.

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

### Importing Your Opportunity Revenue Data

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

To import opportunity revenue 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.

### Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your opportunity revenue data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity revenue, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

Options for Uniquely Identifying the Records

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Revenue object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

Required Attributes and Validations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Opportunity Revenue Record</th>
<th>Updating an Existing Opportunity Revenue Record</th>
<th>Deleting an Existing Opportunity Revenue Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>RevnId</td>
<td>The unique identifier of the summary revenue for this Opportunity.</td>
<td>Not applicable</td>
<td>Not Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyId</td>
<td>The unique ID for the existing opportunity record in the Oracle Sales Cloud destination table.</td>
<td>You can obtain the OptyId for an existing opportunity by exporting the Opportunity object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Either OptyId or OptyNumber is required.</td>
<td>Conditionally Required</td>
</tr>
</tbody>
</table>
Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Revenue object row and click the Download icon.
4. Save the Opportunity Revenue_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Revenue.CSV file and provide valid values for the required attributes.
Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click **Tools > Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. On the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select Opportunity Revenue from the **Object** drop-down list.
4. In **File Name** field, browse and upload the required CSV file, and click **Next**.
5. On the **Map Fields** page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click **Next**.
6. Click the **Validate Data** button to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. On the **Review and Submit** page, click **Submit**.

Reviewing the Import Results

You can review the import results by checking for the import activity on the **Manage Import Activity** page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click **Tools > Import Management**.
2. On the **Manage Imports** page, click the **All Imports** infotile. 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**.

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

Related Topics

- Managing Import Mappings
- Importing Data: Procedure

Importing Your Opportunity Source Data

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

To import opportunity source 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.
Mapping Your Source Data to Oracle Applications Cloud Object Attributes

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

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

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

**Prerequisite Setup Tasks**

You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity source, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

**Options for Uniquely Identifying the Records**

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Source object, the attribute is OptyNumber. It appears as Opportunity Number in the UI.

**Required Attributes and Validations**

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Opportunity Source Record</th>
<th>Updating an Existing Opportunity Source Record</th>
<th>Deleting an Existing Opportunity Source Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptySrcId</td>
<td>The unique ID for the existing campaign source code relationship record in the Oracle Sales Cloud destination table.</td>
<td>Identify the ID for an existing campaign source code relationship by exporting the Opportunity Source object using the Setup and Maintenance, Manage Bulk Data Export, Schedule</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>Conditionally required.</td>
</tr>
</tbody>
</table>
Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Source object row and click the Download icon.
4. Save the Opportunity Source_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Source.CSV file and provide valid values for the required attributes.

Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Opportunity Source from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the Map Fields page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click Next.
6. Click the Validate Data button to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. On the Review and Submit page, click Submit.

Reviewing the Import Results
You can review the import results by checking for the import activity on the Manage Import Activity page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click the All Imports infotile. 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.

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

Related Topics
- Managing Import Mappings
- Importing Data: Procedure

Importing Your Opportunity Team Member Data
Use this topic to import opportunity team member data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete opportunity team member records.

To import opportunity team member records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes
To import your opportunity team member data into Oracle Applications Cloud, you must populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks
You must set certain options for some attributes in the application before you can populate them.

Also, when importing a child record, ensure that its parent record exists in the database. For example, when importing the opportunity team member, ensure that its parent opportunity exists in the database. If the parent record does not exist before importing the child record, then the child record import fails.

**Options for Uniquely Identifying the Records**

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

The preferred option for uniquely identifying an object record is the public unique identifier. If you’re creating records, then you can provide a user-friendly public unique identifier (attributes denoted with Number and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For Opportunity Team Member object, the attribute is `OptyNumber`. It appears as Opportunity Number in the UI.

**Required Attributes and Validations**

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Prerequisite Setup Tasks or Import Validations</th>
<th>Creating an Opportunity Team Member Record</th>
<th>Updating an Existing Opportunity Team Member Record</th>
<th>Deleting an Existing Opportunity Team Member Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptyResourceId</td>
<td>The unique identifier for the opportunity resource.</td>
<td>Not applicable.</td>
<td>Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyId</td>
<td>The unique ID for the existing opportunity record in the Oracle Sales Cloud destination table.</td>
<td>You can obtain the OptyId for an existing opportunity by exporting the Opportunity object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.</td>
<td>Conditionally Required</td>
<td>Either OptyId or OptyNumber is required.</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>OptyNumber</td>
<td>The public unique identifier of the opportunity.</td>
<td>Not applicable.</td>
<td>Conditionally Required</td>
<td>Either OptyId or OptyNumber is required.</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td>ResourcId</td>
<td>The unique party ID for the existing Account Team Member record in Oracle Sales Cloud.</td>
<td>Identify the resource ID value by exporting the resource object using the Setup and Maintenance, The attribute is neither required nor conditionally required.</td>
<td>The attribute is neither required nor conditionally required.</td>
<td>To identify the party, provide either the Oracle Sales Cloud record ID (PartnerAccountId) or both the source</td>
<td>The attribute is neither required nor conditionally required.</td>
</tr>
</tbody>
</table>
Creating Source CSV File for Import

The CSV file is provided as source 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 make use of templates available in preexisting mappings. To download a template, do the following:

1. In the Navigator, under Tools, click Import Management.
2. Click the Import Objects tab to open the Import Object Details page.
3. In the table, select the Opportunity Team Member object row and click the Download icon.
4. Save the Opportunity Team Member_Templates.ZIP file to a location on your desktop.

You must edit the Opportunity Team Member.CSV file and provide valid values for the required attributes.

Creating the Import Activity

To import data into Oracle Applications Cloud, you must create an import activity and provide the CSV file as a source to the activity. You must be signed in as an administrator or a setup user to perform this task. To create an import activity do the following:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Opportunity Team Member from the Object drop-down list.
4. In File Name field, browse and upload the required CSV file, and click Next.
5. On the Map Fields page, the source and target attributes are automatically mapped. If required, manually edit the attribute mappings, and save the mapping file. Click Next.
6. Click the Validate Data button to validate the mapping of the source file for unmapped columns and to check for data format issues.
7. On the Review and Submit page, click Submit.

Reviewing the Import Results

You can review the import results by checking for the import activity on the Manage Import Activity page. You must be signed in as an administrator or a setup user to perform this task. To check the status of the import activity, do as follows:

1. In the Navigator, click Tools > Import Management.
2. On the Manage Imports page, click the All Imports infotile. 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.

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

Related Topics
- Managing Import Mappings
- Importing Data: Procedure

Importing Your Relationship Data

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

To import Relationship records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Relationship 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Relationship records, the source system of the Relationship object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.
Options to Uniquely Identify the Records
To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option to uniquely identify an object record is as follows:

- **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Relationship object, this attribute is RelationshipRecId.

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Relationship record</th>
<th>Updating an Existing Relationship record</th>
</tr>
</thead>
<tbody>
<tr>
<td>RelationshipRecId</td>
<td>The unique ID for the existing Relationship record in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
<td>18</td>
<td>None</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>SubjectPartyId</td>
<td>A source system code that identifies the original source system of the Relationship.</td>
<td>Text</td>
<td>30</td>
<td>None</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ObjectPartyId</td>
<td>A source system reference that is the unique ID of the Relationship in your legacy or external system.</td>
<td>Text</td>
<td>255</td>
<td>None</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>RelationshipType</td>
<td>The unique ID for the existing customer party record in the Oracle Sales Cloud destination table.</td>
<td>Number</td>
<td>18</td>
<td>The party must exist.</td>
<td>Required</td>
<td>Not required</td>
</tr>
</tbody>
</table>
# Attribute Import and Export Management

## Chapter 9 Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validation</th>
<th>Creating an Relationship record</th>
<th>Updating an Existing Relationship record</th>
</tr>
</thead>
<tbody>
<tr>
<td>RelationshipCode</td>
<td>Describes the directional connection between the object and subject relationship.</td>
<td>Varchar2</td>
<td>30</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td></td>
</tr>
<tr>
<td>StartDate</td>
<td>The date on which the relationship begins</td>
<td>Date</td>
<td>Not applicable</td>
<td>Not Required</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Automatically defaults to current date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EndDate</td>
<td>The date at which the relationship ends</td>
<td>Date</td>
<td>Not applicable</td>
<td>Not Required</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Automatically defaults to current date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SubjectTableName</td>
<td>Source table name for the subject</td>
<td>Varchar2</td>
<td>30</td>
<td>Not Required</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This is derived from the SubjectPartyId.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ObjectTableName</td>
<td>Source table name for the object</td>
<td>Varchar2</td>
<td>30</td>
<td>Not Required</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This is derived from the ObjectPartyId.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td>Brief comments entered by the user</td>
<td>Varchar2</td>
<td>2000</td>
<td>Not Required</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>SubjectPartyNumber</td>
<td>Unique identification number for the subject of relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>Either the SubjectPartyId or the SubjectPartyNumber or a combination of Subject Party OS and</td>
<td>Required</td>
<td></td>
</tr>
</tbody>
</table>

---

*Oracle Sales Cloud*

*Understanding Import and Export Management*

*Importing Your Data*
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating an Relationship record</th>
<th>Updating an Existing Relationship record</th>
</tr>
</thead>
<tbody>
<tr>
<td>SubjectType</td>
<td>Subject party Type For example, ORGANIZATION, PERSON</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This is derived from the SubjectPartyId.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ObjectType</td>
<td>Object party Type For example, ORGANIZATION, PERSON</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This is derived from the ObjectPartyId.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ObjectPartyNumber</td>
<td>Unique identification number for the object of the relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>One of the following is required:</td>
<td>Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• ObjectPartyId or ObjectPartyId</td>
<td>• Combination of Object Party OS and Origin System Reference</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Combination of Object Party OS and Origin System Reference</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RelationshipSourceSystem</td>
<td>Original system of this relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RelationshipSourceSystemReferenceValue</td>
<td>Original system reference of this relationship</td>
<td>Varchar2</td>
<td>240</td>
<td>None</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data</td>
<td>If the source of your data</td>
<td></td>
</tr>
</tbody>
</table>
### Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating an Relationship record</th>
<th>Updating an Existing Relationship record</th>
</tr>
</thead>
<tbody>
<tr>
<td>CreatedByModule</td>
<td>Record created by the flow</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>DependentFlag</td>
<td>This is used to model dependent members.</td>
<td>Varchar2</td>
<td>1</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>PercentageOwnership</td>
<td>Percentage of child entity owned by its parent entity.</td>
<td>Number</td>
<td>None</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>SubjectSourceSystem</td>
<td>Original System ID for the Subject of the Relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td>If the source of your data is a third party or external system, and</td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and</td>
<td>If the source of your data is a third party or external system, and</td>
</tr>
<tr>
<td></td>
<td>you intend to import updates to previously imported records from the same</td>
<td></td>
<td></td>
<td></td>
<td>you intend to import updates to previously imported records from the same system, provide</td>
<td>you intend to import updates to previously imported records from the same system, provide</td>
</tr>
<tr>
<td></td>
<td>system, provide the original source system and source system reference</td>
<td></td>
<td></td>
<td></td>
<td>the original source system and source system reference values.</td>
<td>the original source system and source system reference values.</td>
</tr>
<tr>
<td></td>
<td>values.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SubjectSourceSystem</td>
<td>Original System Reference for the Subject of the Relationship</td>
<td>Varchar2</td>
<td>240</td>
<td>None</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td>If the source of your data is a third party or external system, and</td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and</td>
<td>If the source of your data is a third party or external system, and</td>
</tr>
<tr>
<td></td>
<td>you intend to import updates to previously imported records from the same</td>
<td></td>
<td></td>
<td></td>
<td>you intend to import updates to previously imported records from the same system, provide</td>
<td>you intend to import updates to previously imported records from the same system, provide</td>
</tr>
<tr>
<td></td>
<td>system, provide the original source system and source system reference</td>
<td></td>
<td></td>
<td></td>
<td>the original source system and source system reference values.</td>
<td>the original source system and source system reference values.</td>
</tr>
<tr>
<td></td>
<td>values.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Relationship record</td>
<td>Updating an Existing Relationship record</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------------------</td>
<td>------------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td>you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
</tr>
<tr>
<td><strong>ObjectSourceSystem</strong></td>
<td>Original System ID for the Object of the Relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
</tr>
<tr>
<td><strong>ObjectSourceSystemReference</strong></td>
<td>Original System Reference for the Object of the Relationship</td>
<td>Varchar2</td>
<td>240</td>
<td>None</td>
<td>Conditionally Required</td>
<td>Conditionally Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
<td>If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.</td>
</tr>
<tr>
<td><strong>SubjectUsageCode</strong></td>
<td>Usage code of the subject party in the relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>This is derived from the ObjectPartyId.</td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating an Relationship record</td>
<td>Updating an Existing Relationship record</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>---------------------------------------------</td>
<td>-------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>ObjectUsageCode</td>
<td>Usage code of the Object party in the relationship</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>HeadOfHouseholdFlag</td>
<td>Saves the head of Household attribute. This column is only applicable in the MEMBERSHIP relationship and is not used to indicate which members are the head of households. Note that there may be multiple heads of households, depending on the deploying company’s implementation.</td>
<td>Varchar2</td>
<td>1</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>RequestId</td>
<td>Enterprise Service Scheduler indicates the request ID of the job that created or last updated the row.</td>
<td>Number</td>
<td>18</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>JobDefinitionName</td>
<td>Enterprise Service Scheduler indicates the name of the job that created or last updated the row.</td>
<td>Varchar2</td>
<td>100</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>JobDefinitionPackage</td>
<td>Enterprise Service Scheduler indicates the name of the job that created or last updated the row.</td>
<td>Varchar2</td>
<td>900</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
<tr>
<td>Role</td>
<td>Specifies the contact’s role</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
</tr>
</tbody>
</table>
### Attribute Description Data Type Data Length Prerequisite Setup Task/ Import Validations Creating an Relationship record Updating an Existing Relationship record

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup</th>
<th>Task/ Import</th>
<th>Validations</th>
<th>Creating an Relationship record</th>
<th>Updating an Existing Relationship record</th>
</tr>
</thead>
<tbody>
<tr>
<td>InfluenceLevel</td>
<td>Specifies the contact’s level of influence in the buying process.</td>
<td>Varchar2</td>
<td>30</td>
<td>None</td>
<td>Not Required</td>
<td>Not Required</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can view the Relationship 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.

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

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

You must edit the template .csv file and provide valid values for the required attributes. In the following sample source file, the import .csv file uses original system reference information from legacy system to identify the Relationship and the customer. A value is provided for **ProdGroupInternalName** to identify the product group, as shown in the following table:

<table>
<thead>
<tr>
<th>Relationship</th>
<th>Relationship</th>
<th>Relationship</th>
<th>CostDocAr</th>
<th>PURCHASE CUST_OS DATE</th>
<th>CUST_OSR</th>
<th>EnteredCurrencyCode</th>
<th>Quantity</th>
<th>Status Code</th>
<th>ProdGroupInternalName</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship</td>
<td>Relationship</td>
<td>Siebel CRM</td>
<td>001</td>
<td>03/10/2017 SIEBEL</td>
<td>1-2LF</td>
<td>GBP</td>
<td>101</td>
<td>ACTIVE</td>
<td>WAVE_Electronics</td>
</tr>
<tr>
<td>Relationship</td>
<td>Relationship</td>
<td>Siebel CRM</td>
<td>002</td>
<td>03/11/2017 SIEBEL</td>
<td>1-2LF</td>
<td>SGD</td>
<td>102</td>
<td>ACTIVE</td>
<td>WAVE_Desktops</td>
</tr>
</tbody>
</table>

In the following sample source file, the user enters **CustomerID** to identify the customer. For product item, instead of referring to legacy system, they use **InventoryItemld**, **InventoryOrgId**, and **UomCode**.
Creating 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. Sign in as a setup user.
2. In the Navigator, under Tools, click Import Management.
3. On the Manage Imports page, click Create Import Activity.
4. In the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Relationship from the Object drop-down list.
5. In File Name, browse and upload the required .csv file, and click Next.
6. In the Create Import Activity: Map Fields page edit the attribute mappings if required, and click Next.

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

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

Reviewing the Import Results

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

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

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

Related Topics

- File Import: How It Works
- Importing Data from a File: Procedure
Importing Your Sales Lead Data

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

To import Sales Lead records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Sales Lead 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.

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Sales Lead records, the source system of the Sales Lead object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

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

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

- **Public unique identifiers**: If you are creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with ‘Number’ and usually visible in the business object’s UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object’s UI, you can use the Number attribute to identify the record. For the Sales Lead object, the attribute is LeadNumber.
- **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with “id” in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by
doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Sales Lead object, this attribute is LeadId.

### Required Attributes and Validations

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

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating a Sales Lead record</th>
<th>Updating an Existing Sales Lead record</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcceptedDate</td>
<td>The date the recommended lead generated by the Sales Prediction engine was accepted by a sales person or lead qualifier to pursue</td>
<td>Date</td>
<td>Not applicable</td>
<td>No validation</td>
<td>A value is required if you specify the value for LeadAcceptedFlag as Y.</td>
<td>Not required</td>
</tr>
<tr>
<td>ActionCode</td>
<td>Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.</td>
<td>Text</td>
<td>30</td>
<td>If no value is provided, the record is updated if it already exists. Else, it is inserted</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>ConvertedTm</td>
<td>The date when the lead was converted to an opportunity</td>
<td>Date</td>
<td>Not applicable</td>
<td>No validation</td>
<td>A value is required if you specify the value for Lead StatusCd as CONVERTED.</td>
<td>Not required</td>
</tr>
<tr>
<td>LeadName</td>
<td>The name that identifies the lead</td>
<td>Text</td>
<td>250</td>
<td>No validation</td>
<td>A value is required if you are creating a new lead.</td>
<td>Not required</td>
</tr>
<tr>
<td>LeadNumber</td>
<td>The Lead’s public unique identifier value</td>
<td>Text</td>
<td>64</td>
<td>If providing a value to update an existing lead, the value must</td>
<td>If providing a value and creating a new lead.</td>
<td>A value is required, if updating an existing lead</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating a Sales Lead record</td>
<td>Updating an Existing Sales Lead record</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>----------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>LeadOrigSystem</td>
<td>The source system code that identifies the original source system of the sales lead</td>
<td>Text</td>
<td>30</td>
<td>The combination of the LEAD_ORIG_SYSTEM LEAD_ORIG_SYSTEM_REFERENCE and BATCH_ID must be unique.</td>
<td>Not required</td>
<td>Not required</td>
</tr>
<tr>
<td>LeadOrigSystemRef</td>
<td>A source system reference that identifies the unique ID of the lead in your legacy or external system</td>
<td>Text</td>
<td>240</td>
<td>The combination of the LEAD_ORIG_SYSTEM LEAD_ORIG_SYSTEM_REFERENCE and BATCH_ID must be unique. This is automatically generated by the import process, if creating a new record and you do not provide a value.</td>
<td>A value is required, if creating a new lead and importing associated records, such as products and sales team members, in the same import batch as the lead.</td>
<td>Not required</td>
</tr>
<tr>
<td>ObjectKey</td>
<td>The unique ID for the existing lead record in the Oracle Sales Cloud destination table</td>
<td>Number</td>
<td>18</td>
<td>Automatically generated by the import process if creating a new record. If updating an existing record and providing the LEAD_NUMBER, the import process defaults the LEAD_ID.</td>
<td>Do not provide a value if creating a new lead.</td>
<td>A value is required, if updating an existing lead and you are not providing the LeadNumber.</td>
</tr>
<tr>
<td>OwnerId</td>
<td>The unique ID for the existing resource party in the Oracle Sales Cloud destination table. The owner must also be an internal resource included as a member of the</td>
<td>Number</td>
<td>18</td>
<td>If providing a value, the value must exist in the column PARTY_ID of the HZ_PARTIES table. The value must also exist in the column PARTY_ID of the JTF_RS_.</td>
<td>A value is required, if creating a new lead and you do not provide the owner's source system code and reference (OwnerOrigSystem and OwnerOrigSystemRef)</td>
<td>Not required</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/ Import Validations</td>
<td>Creating a Sales Lead record</td>
<td>Updating an Existing Sales Lead record</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>lead's sales team</td>
<td>For a lead being created or an existing lead being updated, the sales team</td>
<td>Text</td>
<td>30</td>
<td>RESOURCE_PROFILES table. The identified party must be assigned as a sales team resource for the existing lead or included in the resources imported in the same batch as this record.</td>
<td>Not required</td>
<td></td>
</tr>
<tr>
<td>OwnerOrigSystem</td>
<td>The source system code that identifies the original source system of the</td>
<td>Text</td>
<td>30</td>
<td>If providing a value, a value must also be provided for OwnerOrigSystemRe and both must exist in the columns ORIG_SYSTEM and ORIG_SYSTEM_REFERENCES of the HZ.ORIG_SYS_REFERENCES table, or the ApproverId value must be set. Provide the source system reference (OwnerOrigSystemRe) and the source system code (OwnerOrigSystem) to identify the owner. The import process uses the source system code and source system reference values to find the OwnerId (Oracle Sales Cloud ID) for the new or existing owner imported with the source system reference and source system code values.</td>
<td>Not required</td>
<td></td>
</tr>
<tr>
<td>OwnerOrigSystemRe</td>
<td>The source system code</td>
<td>Text</td>
<td>255</td>
<td>If providing a value, a value must also be provided for OwnerOrigSystemRe and both must exist in the columns ORIG_SYSTEM and ORIG_SYSTEM_REFERENCES of the HZ.ORIG_SYS_REFERENCES table, or the ApproverId value must be set. Provide the source system reference (OwnerOrigSystemRe) and the source system code (OwnerOrigSystem) to identify the owner. The import process uses the source system code and source system reference values to find the OwnerId (Oracle Sales Cloud ID) for the new or existing owner imported with the source system reference and source system code values.</td>
<td>Not required</td>
<td></td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setup Task/Import Validations</td>
<td>Creating a Sales Lead record</td>
<td>Updating an Existing Sales Lead record</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>-------------------------------------------</td>
<td>------------------------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>QualifiedDate</td>
<td>The date when the lead was qualified</td>
<td>Date</td>
<td>Not applicable</td>
<td>No validation</td>
<td>A value is required, if you optionally provide the lead status (StatusCd) value as QUALIFIED, indicating that the lead is qualified.</td>
<td>Not required</td>
</tr>
<tr>
<td>RejectedTm</td>
<td>The date when the lead was rejected</td>
<td>Date</td>
<td>Not applicable</td>
<td>No validation</td>
<td>A value is required, if you optionally provide the lead registration status (ApprovalStatus) value as REJECTED, indicating that the lead is rejected.</td>
<td>Not required</td>
</tr>
<tr>
<td>RetiredTm</td>
<td>The date when the lead was retired</td>
<td>Date</td>
<td>Not applicable</td>
<td>No validation</td>
<td>A value is required, if you optionally provide the lead lead status (StatusCd) value as RETIRED, indicating that the lead is retired.</td>
<td>Not required</td>
</tr>
</tbody>
</table>

You can view the Sales Lead 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.
Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes.

<table>
<thead>
<tr>
<th>LeadNumber</th>
<th>Name</th>
<th>Rank</th>
<th>ChannelType</th>
<th>CustomerPartyName</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKL-12345</td>
<td>Sample Lead</td>
<td>HOT</td>
<td>WEB</td>
<td>Acme Inc.</td>
</tr>
<tr>
<td>MKL-2343</td>
<td>Useful Lead</td>
<td>HOTE</td>
<td>PHONE</td>
<td>CustomerMa</td>
</tr>
</tbody>
</table>

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

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

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

Reviewing the Import Results

You can review the import results by checking for the import activity in the Manage Import Activity page.

A file import activity is said to be successful when its status displays as Completed. To check the status of the import activity, do as follows:

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

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

Related Topics
- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud

Importing Your Sales Lead Contact Data

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

To import Sales Lead Contact records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Sales Lead Contact data into Oracle Applications Cloud, you need to populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Sales Lead Contact records, the source system of the Sales Lead Contact object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.
Options to Uniquely Identify the Records

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

The preferred option to uniquely identify an object record is as follows:

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

Required Attributes and Validations

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

The following table lists the required attributes for importing new Sales Lead Contact records, required attributes for updating Sales Lead Contact records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Lead Contact import:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating a Sales Lead Contact record</th>
<th>Updating an Existing Sales Lead Contact record</th>
</tr>
</thead>
<tbody>
<tr>
<td>LeadOrigSystem</td>
<td>The code that identifies the original source system for the sales lead</td>
<td>Text</td>
<td>30</td>
<td>If providing a value and importing a new sales lead in the same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemRef) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.</td>
<td>Conditionally required, when the lead is created in the same batch as adding a new lead contact</td>
<td>Not required</td>
</tr>
<tr>
<td>LeadOrigSystemRef</td>
<td>The ID that identifies the original source</td>
<td>Text</td>
<td>240</td>
<td>If providing a value and importing a new sales lead in the same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemRef) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.</td>
<td>Conditionally required, when the lead is created in the same batch as adding a new lead contact</td>
<td>Not required</td>
</tr>
<tr>
<td>Attribute</td>
<td>Description</td>
<td>Data Type</td>
<td>Data Length</td>
<td>Prerequisite Setups/Import Validations</td>
<td>Creating a Sales Lead Contact record</td>
<td>Updating an Existing Sales Lead Contact record</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>----------------------------------------</td>
<td>--------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>system reference for the sales lead</td>
<td></td>
<td></td>
<td>same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemRef) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS table.</td>
<td>same batch as adding a new lead contact</td>
<td></td>
</tr>
<tr>
<td>LeadId</td>
<td>The unique ID for the existing lead record in the Oracle Sales Cloud destination table</td>
<td>Number</td>
<td>18</td>
<td>The value provided must match the value in the LEAD_ID column of the MKL_LM_LEADS table.</td>
<td>Conditionally required, when the lead is created in a different batch as adding a new lead contact.</td>
<td>Not required</td>
</tr>
<tr>
<td>PartyOrigSystem</td>
<td>The code that identifies the original source system for the contact</td>
<td>Text</td>
<td>30</td>
<td>If providing a value, the combination of source system reference (PartyOrigSystemRef) and source system code (PartyOrigSystem) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ORIG_SYS_REFERENCES table.</td>
<td>Conditionally required, when you do not provide the contact’s party ID (PartyId)</td>
<td>Conditionally required, when you do not provide the unique ID for the record (LeadTcMembersId) or the contact’s party ID (PartyId)</td>
</tr>
<tr>
<td>PartyOrigSystemRef</td>
<td>The ID that identifies the original source system reference for the contact</td>
<td>Text</td>
<td>240</td>
<td>If providing a value, the combination of source system reference (PartyOrigSystemRef) and source system code (PartyOrigSystem) must exist in the columns ORIG_SYSTEM_REFERENCE and</td>
<td>Conditionally required when you do not provide the contact’s party ID</td>
<td>Conditionally required when you do not provide the unique ID for the record (LeadTcMembersId) or the contact’s party ID (PartyId)</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating a Sales Lead Contact record | Updating an Existing Sales Lead Contact record
---|---|---|---|---|---|---
**PartyId** | The unique ID for the existing contact's party record in the Oracle Sales Cloud destination table | Number | 18 | The value provided must match the value in the PARTY_ID column of the HZ_PARTIES table. | Conditionally required when you do not provide the contact's source system and source system reference | Conditionally required when you do not provide the contact's source system and source system reference
**PrimaryFlag** | Specifies whether the provided contact is a primary contact on the sales lead | Text | 1 | The value must be either Y or N. | Conditionally required, as at least one contact for a lead has this value set to Y. | Conditionally required, as at least one contact for a lead has this value set to Y.

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

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

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

You must edit the template .csv file and provide valid values for the required attributes. A sample CSV file appears as shown in the following table:

<table>
<thead>
<tr>
<th>LeadId</th>
<th>PartyId</th>
<th>LeadMemberId</th>
<th>PrimaryFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>300234234</td>
<td>34234234</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>234234234</td>
<td>23423423</td>
<td></td>
<td>N</td>
</tr>
</tbody>
</table>
Creating 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. Sign in as a setup user.
2. In the Navigator, under Tools, click Import Management.
3. On the Manage Imports page, click Create Import Activity.
4. In the Create Import Activity: Enter Import Options page, provide a name for the import activity, and select Sales Lead Contact from the Object drop-down list.
5. In File Name, browse and upload the required .csv file, and click Next.
6. In the Create Import Activity: Map Fields page edit the attribute mappings if required, and click Next.

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

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

Reviewing the Import Results

You can review the import results by checking for the import activity in the Manage Import Activity page.

A file import activity is said to be successful when its status displays as Completed. To check the status of the import activity, do as follows:

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

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

Related Topics

- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud
Importing Your Sales Lead Product Data

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

To import Sales Lead Product records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Sales Lead Product data into Oracle Applications Cloud, you need to populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Sales Lead Product records, the source system of the Sales Lead Product object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

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

The preferred option to uniquely identify an object record is as follows:

- **Internal ID**: If you are identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Sales Lead Product object, these attributes are as follows:
  - InventoryOrgId
  - ItemId
  - ProductGroupId
## Required Attributes and Validations

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

The following table lists the required attributes for importing new Sales Lead Product records, required attributes for updating Sales Lead Product records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Lead Product import:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/ Import Validations</th>
<th>Creating a Sales Lead Product record</th>
<th>Updating an Existing Sales Lead Product record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ItemId</td>
<td>The unique ID for the existing sales catalog product (item) record in the Oracle Sales Cloud destination table</td>
<td>Number</td>
<td>18</td>
<td>The value provided must match the value in the INVENTORY_ITEM_ID column of the EGP_SYSTEM_ITEMS_B table.</td>
<td>Conditionally required, when you do not provide the ProductName and ProductGroupId/ProductGroupName</td>
<td>Conditionally required, when you do not provide the ProductName and ProductGroupId/ProductGroupName</td>
</tr>
<tr>
<td>ItemNumber</td>
<td>The unique ID for the existing sales catalog product (item number) record in the Oracle Sales Cloud destination table</td>
<td>Text</td>
<td>64</td>
<td>The value provided must match the value in the ITEM_NUMBER column of the EGP_SYSTEM_ITEMS_B table.</td>
<td>Conditionally required, when you do not provide the ProductName and ProductGroupId/ProductGroupName</td>
<td>Conditionally required, when you do not provide the ProductName and ProductGroupId/ProductGroupName</td>
</tr>
<tr>
<td>LeadNumber</td>
<td>Leads Public Unique Identifier value</td>
<td>Text</td>
<td>64</td>
<td>The value provided must match the value in the LEAD_NUMBER column of the MKL_LM_LEADS table.</td>
<td>Conditionally required, when you do not provide the LeadId</td>
<td>Conditionally required, when you do not provide the LeadId</td>
</tr>
<tr>
<td>PrimaryFlag</td>
<td>Indicates whether the product or product group is the primary product of interest for the lead</td>
<td>Text</td>
<td>1</td>
<td>The value must be either Y or N.</td>
<td>Conditionally required, as at least one product or product group for a lead has this value set to Y</td>
<td>Conditionally required, as at least one product or product group for a lead has this value set to Y</td>
</tr>
<tr>
<td>ProductGroupInternalName</td>
<td>Internal name for the sales catalog product group</td>
<td>Text</td>
<td>150</td>
<td>The value provided must match the value in the</td>
<td>Conditionally required, when you do not provide the</td>
<td>Conditionally required, when you do not provide the</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating an Existing Sales Lead Product Record | Updating an Existing Sales Lead Product Record
--- | --- | --- | --- | --- | --- | ---
ProductGroupId | The unique ID for the existing product group record in the oracle sales cloud destination table | Number | 18 | The value provided must match the value in the PROD_GROUP_ID column of the QSC_PROD_GROUPS_B table. | Conditionally required, when you do not provide the ProductGroupId and ItemId/ProductName | Conditionally required, when you do not provide the ProductGroupId and ItemId/ProductName
ProductGroupName | The internal name for the sales catalog product group | Text | 100 | The value provided must match the value in the INTERNAL_NAME column of the QSC_PROD_GROUPS_B table. | Conditionally required, when you do not provide the ProductGroupId and ItemId/ProductName | Conditionally required, when you do not provide the ProductGroupId and ItemId/ProductName
ProductName | The internal name for the sales catalog product | Text | 100 | The value provided must be defined for the sales catalog specified for the QSC_SALES_PRODUCTS_INVENTORY_ORG_ID profile. | Conditionally required, when you do not provide the ItemId and ProductGroupId/ProductGroupName | Conditionally required, when you do not provide the ItemId and ProductGroupId/ProductGroupName

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

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

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

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

You must edit the template .csv file and provide valid values for the required attributes, as shown in the following table:

<table>
<thead>
<tr>
<th>LeadNumber</th>
<th>ItemId</th>
<th>ItemOrgId</th>
<th>ProductName</th>
<th>ProductGroupName</th>
<th>ProductGroupId</th>
<th>PrimaryFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDRM_234</td>
<td>999997500679020</td>
<td>204</td>
<td>Consulting</td>
<td></td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>CDRM_234</td>
<td>999997826071175</td>
<td></td>
<td>GCM Activity Hub B2C (3-57FC-880)</td>
<td></td>
<td></td>
<td>N</td>
</tr>
</tbody>
</table>

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

\[\text{Note:}\] Click Validate Data to validate the mapping of the source file for unmapped columns and to check for data format issues.

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

Reviewing the Import Results

You can review the import results by checking for the import activity in the Manage Import Activity page.

A file import activity is said to be successful when its status displays as Completed. To check the status of the import activity, do as follows:

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

\[\text{Note:}\] 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.
Importing Your Sales Lead Resource Data

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

To import Sales Lead Resource records, perform the following tasks:

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

Mapping Your Source Data to Oracle Applications Cloud Object Attributes

To import your Sales Lead Resource data into Oracle Applications Cloud, you need to populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

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

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

Prerequisite Setup Tasks

You need to set certain options for some attributes in the application before you can populate them. For example, if you are using source system reference information to identify your Sales Lead Resource records, the source system of the Sales Lead Resource object should be enabled for parties in the Manage Trading Community Source Systems task. Also, when importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Records

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

The preferred option to uniquely identify an object record is as follows:

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

- LeadId
- ResourceId
- LeadResourceId

**Required Attributes and Validations**

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

The following table lists the required attributes for importing new Sales Lead Resource records, required attributes for updating Sales Lead Resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Lead Resource import:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating a Sales Lead Resource record</th>
<th>Updating an Existing Sales Lead Resource record</th>
</tr>
</thead>
<tbody>
<tr>
<td>LeadId</td>
<td>The unique ID for the existing lead record in the Oracle Sales Cloud destination table</td>
<td>Number</td>
<td>18</td>
<td>The value provided must match the value in the LEAD_ID column of the MKL_LM_LEADS table.</td>
<td>Conditionally required, when you do not provide the LeadNumber</td>
<td>Conditionally required, when you do not provide the LeadNumber</td>
</tr>
<tr>
<td>LeadNumber</td>
<td>The Lead’s Public Unique Identifier value</td>
<td>Text</td>
<td>64</td>
<td>The value provided must match the value in the LEAD_NUMBER column of the MKL_LM_LEADS table.</td>
<td>Conditionally required, when you do not provide the LeadId</td>
<td>Conditionally required, when you do not provide the LeadId</td>
</tr>
<tr>
<td>LeadOrigSystem</td>
<td>The code that identifies the original source system for the sales lead</td>
<td>Text</td>
<td>30</td>
<td>If providing a value and importing a new sales lead in the same import as this lead resource association, the value must be part of a unique combination of the source system reference (LeadOrigSystemRef) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.</td>
<td>Conditionally required, when the lead is created in the same batch as adding a new team member</td>
<td>Not required</td>
</tr>
</tbody>
</table>
# Oracle Sales Cloud

## Understanding Import and Export Management

### Chapter 9

#### Importing Your Data

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Data Type</th>
<th>Data Length</th>
<th>Prerequisite Setup Task/Import Validations</th>
<th>Creating a Sales Lead Resource record</th>
<th>Updating an Existing Sales Lead Resource record</th>
</tr>
</thead>
<tbody>
<tr>
<td>LeadOrigSystemRef</td>
<td>The ID that identifies the original source system reference for the sales lead</td>
<td>Text</td>
<td>240</td>
<td>If providing a value and importing a new sales lead in the same import as this lead resource association, the value must be part of a unique combination of the source system reference (LeadOrigSystemRef) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.</td>
<td>Conditionally required, when the lead is created in the same batch as adding a new team member</td>
<td>Not required</td>
</tr>
<tr>
<td>LeadResourceId</td>
<td>The unique ID for the existing sales team member (resource) association record in the Oracle Sales Cloud destination table</td>
<td>Number</td>
<td>18</td>
<td>Automatically generated by the import process</td>
<td>Automatically generated by the import process if creating a new record</td>
<td>Required</td>
</tr>
<tr>
<td>ResourceId</td>
<td>The unique ID for the existing resource’s party record in the Oracle Sales Cloud destination table</td>
<td>Number</td>
<td>18</td>
<td>Provided value must match with PARTY_ID column of HZ_PARTIES table.</td>
<td>Conditionally required, when you do not provide the resource’s source system and source system reference or the resource’s user name.</td>
<td>Conditionally required, when you do not provide the unique ID for the record or the resource’s source system and source system reference.</td>
</tr>
<tr>
<td>ResourceOrigSys</td>
<td>The source system code that identifies the original source system of the lead sales team members party</td>
<td>Text</td>
<td>30</td>
<td>If providing a value, the combination of source system reference (ResourceOrigSysRef) and source system code (ResourceOrigSys) must exist in the columns ORIG_SYSTEM_REFERENCE</td>
<td>Conditionally required, when you do not provide the resource’s party ID (ResourceId)</td>
<td>Conditionally required, when you do not provide the unique ID for the record (LeadResourceId) or the resource’s party ID (ResourceId)</td>
</tr>
</tbody>
</table>
### Attribute | Description | Data Type | Data Length | Prerequisite Setup Task/Import Validations | Creating a Sales Lead Resource record | Updating an Existing Sales Lead Resource record
--- | --- | --- | --- | --- | --- | ---
ResourceOrigSysRef | The ID that identifies the lead sales team member’s party in your legacy or external system | Text | 240 | If providing a value, the combination of source system reference (ResourceOrigSysRef) and source system code (ResourceOrigSys) must exist in the columns ORIG_SYSTEMREFERENCE and ORIG_SYSTEM of the HZ_ ORIG_SYS_REFERENCES table. | Conditionally required, when you do not provide the resource’s party ID (ResourceId) | Conditionally required, when you do not provide the unique ID for the record (LeadResourceId) or the resource’s party ID (ResourceId)
UserName | The resources application user name. | Text | 100 | No validation | Conditionally required, when you do not provide the resource’s source system and source system reference or the resource’s unique ID | Not required
PrimaryFlag | Indicates whether the resource is the Owner of the lead | Text | 1 | The value must be either Y or N. | Conditionally required, as at least one contact for a lead has this value set to Y | Conditionally required, as at least one contact for a lead has this value set to Y

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

### Creating Source CSV File for Import

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 pre-existing mappings. To download a template, do the following:

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

You must edit the template .csv file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses some of the internal IDs.

<table>
<thead>
<tr>
<th>LeadId</th>
<th>Resourceld</th>
<th>LeadNumber</th>
<th>PrimaryFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>2342342</td>
<td>34234324</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>2342234</td>
<td>CRDM_34432</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

Reviewing the Import Results

You can review the import results by checking for the import activity in the Manage Import Activity page.

A file import activity is said to be successful when its status displays as Completed. To check the status of the import activity, do as follows:

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

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

**Related Topics**

- File Import: How It Works
- Importing Data from a File: Procedure
- File Based Data Import for Oracle Sales Cloud
10 Importing Data Using External Data Loader Client

External Data Loader Client: Overview

This topic provides an overview of the External Data Loader Client. The External Data Loader Client is a command-line tool that automatically divides a large data file into several smaller importable data files. This decreases the performance costs associated with large volume imports. In addition, you can trigger the multiple file import activities required to import a large data set, in a single action instead of manually or programmatically triggering multiple import activities.

Downloading and Installing the External Data Loader Client

This topic explains the procedure to download and install the External Data Loader Client. The following steps are involved in this process:

1. Verify Prerequisites
2. Download and Install

Verify Prerequisites

Java Requirement

Ensure that your computer has Java version 1.8 or higher installed.

Supported Operating Systems

The following are the supported Operating Systems:

- Microsoft Windows 7
- Microsoft Windows 8
- Microsoft Windows 10

Ensure that your Operating System is one of these.

Required Privileges

To download the client, you must have access to My Oracle Support (support.oracle.com). To use the tool to import data into Oracle Sales Cloud, you must have the privileges to use REST services and to import data for the object you are importing.

Prerequisite steps in Oracle Sales Cloud

The Data Loader client does not require any specific configuration within Oracle Sales Cloud. Before using the client, you must create an import map, as the client passes a mapping number value when submitting an import request. You cannot create a new import mapping from the Data Loader Client application.
Download and Install

**Download and Installation**

You can download the client from My Oracle Support (Doc ID 2325249.1).

The downloaded file contains a ZIP file, with sub-folders. Save the ZIP file to a directory in which the full file path contains no white spaces. You must extract all of the files to a folder on your computer.

> **Note:** When executing the client from the command line the application uses the name oscdataloader.jar. For example,

    > java -jar oscdataloader.jar -h

Using the External Data Loader Client: Explained

This topic describes how to use the Data Loader Client tool. The following steps are involved in this process:

- Storing Credentials
- File Splitting
- Submitting an Import and Getting the Status of the Submitted Import
- Logging and Diagnostics
- Using a Configuration File
- Command-Line Parameters

**Storing Credentials**

You can install and deploy the client for automated imports while still hiding the credentials that are used with the help of the Credential Store. The Credential Wallet holds one set of user credentials (user name and password pair). To save a set of credentials use the `savepassword` command. For example:

    > java -jar oscdataloader.jar savepassword -username John.Doe

Enter your password:

    >

You are prompted to enter the password for the specified user name value. This password is masked so that it cannot be viewed in the command window. You can then use the tool to submit or retrieve the status or log files for an import by only providing the user name value. This protects the password of the integration user by preventing other users from viewing the password either on the command line (by scrolling back through recently executed commands, viewing the password in the scheduling utility, or opening a configuration file containing the password value).

You can use the `-h` option to see a description of all the commands that are available (see the Command-Line Parameters section). For example, the following command lists all the command-line options.

    > java -jar oscdataloader.jar help

You can get the options for each command, by using the option `-h` for that command. For example, the following command lists the options available for the submit command.
Status of the Import Job

Following are the possible statuses of the import job:

- Completed - all batches have status of Completed.
- Completed with Errors - one or more batches have the status Completed with Errors.
- In Progress - one or more batches have the status In Progress.
- Unsuccessful - one or more batches are Unsuccessful.
- Completed with Warnings - one or more batches have the status Completed with Warnings.

File Splitting

You can use the tool to split a source file into multiple smaller files for upload and then import. You can split a CSV file in one of two ways:

- Independently - the specified CSV file can be split based on selected parameters and no import is performed
- As part of import - the specified CSV file is split and then each of resulting files are uploaded and then imported into Oracle Sales Cloud

Submitting an Import and Getting the Status of the Submitted Import

The submit operation, takes the source single CSV file, splits the file into smaller files (if necessary), uploads those files to the Webcenter Content Repository and then triggers an import of the files. When executing the client from the command line, you must provide the URL of the environment against which the request is run, the user name of the user whose credentials are used for authentication, the import object name, the import map number and the name of the source file. For example:

```shell
```

If multiple import activities are created due to splitting of files, then import activity name values are the same. The file name values are suffixed with a count value. For example, if the source file Account.csv is split into two files, then file name values are called Account_1.csv and Account_2.csv.

You can retrieve the list of imports that have recently run on a server using the `listimports` command. For example,

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

lists the imports as a table in the command window. An example of the output would contain the following information:

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Name</th>
<th>Object</th>
<th>Attachment Object</th>
<th>Start Time</th>
<th>End Time</th>
<th>Status</th>
<th>Submitted By</th>
<th>Activate</th>
</tr>
</thead>
<tbody>
<tr>
<td>012345678901:</td>
<td>Account Import</td>
<td>Account</td>
<td>N/A</td>
<td>20170410 14:56T05:00</td>
<td>20170410 16:56T05:00</td>
<td>Completed</td>
<td>John.Doe</td>
<td>Yes</td>
</tr>
<tr>
<td>787878787878:</td>
<td>Opportunity Sync</td>
<td>Opportunity</td>
<td>N/A</td>
<td>20170411 17:06T05:00</td>
<td>20170411 20:06T05:00</td>
<td>Completed with errors</td>
<td>John.Doe</td>
<td>Yes</td>
</tr>
</tbody>
</table>
To retrieve the status of a specific import and display it in the command window, provide the identifier value of the import on the command line. For example:

```shell
> java -jar oscdataloader.jar status -target-url https://mypod.oracle.com -username importuser -import-activity 012345678912345
```

This command displays the detailed status of the matching import request (if no matching request is found, then an error is displayed). An example of the output contains the following information:

<table>
<thead>
<tr>
<th>Object</th>
<th>Attachment</th>
<th>Status</th>
<th>Start Time</th>
<th>End Time</th>
<th>Number of File Splits</th>
<th>Records Read</th>
<th>Successfully Loaded</th>
<th>Errors Reported</th>
<th>Warnings Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>N/A</td>
<td>Completed</td>
<td>20170410 14:56T05:00</td>
<td>20170410 17:36T05:00</td>
<td>2</td>
<td>50,000</td>
<td>49,950</td>
<td>50</td>
<td>0</td>
</tr>
</tbody>
</table>

Logging and Diagnostics

You can retrieve the log files generated by an import activity using the `getlogs` command. For example,

```shell
> java -jar oscdataloader.jar getlogs -target-url https://mypod.oracle.com -username importuser -log-type Exception -import-activity 012345678912345
```

Log files retrieved by the `getlogs` command are stored in the `importlogs` folder by default. Log file of the External Data Loader Client is stored in the `oscdataloaderlogs` folder.

Using a Configuration File

The default configuration file is called `oscdataloader.config` and it is located in the `config` folder. For example,

```shell
> java -jar oscdataloader.jar listimports
```

would use the parameters specified in the default configuration file. You can use a configuration file located in a different folder. For example:

```shell
> java -jar oscdataloader.jar listimports -config c:\test\configfile.txt
```

The configuration file should contain all the parameters required to execute an import. Each line in the file should contain one key-value pair. For example:

```ini
import-name=Testing
input-file=c:\\testing\\testing.csv
mapping-number=888100111272708
target-url=https://mypod.oracle.com
object=Account
username= john.doe
```
### Command-Line Parameters
The following commands are available at the command line:

<table>
<thead>
<tr>
<th>Command and Options (Preceded by Hyphen)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>getlogs</td>
<td>Get log files of an import activity in Oracle Sales Cloud.</td>
</tr>
<tr>
<td>-target-url (required)</td>
<td>The Oracle Sales Cloud environment against which the command is executed.</td>
</tr>
<tr>
<td>-username (required)</td>
<td>Specify the Oracle Sales Cloud user name of the user executing the command.</td>
</tr>
<tr>
<td>-import-activity (required)</td>
<td>The import activity to submit.</td>
</tr>
<tr>
<td>-log-type (required)</td>
<td>Specify the type of log file to generate. Possible values are Exception, Error, Diagnostic, or All.</td>
</tr>
<tr>
<td>-config (optional)</td>
<td>The path where the configuration file is located.</td>
</tr>
<tr>
<td>-wallet (optional)</td>
<td>The Credential Store that holds one set of user credentials (user name and password pair).</td>
</tr>
<tr>
<td>-help (optional)</td>
<td>Display help text containing possible commands.</td>
</tr>
<tr>
<td>help</td>
<td>Show the usage message.</td>
</tr>
<tr>
<td>listimports</td>
<td>Get the list of import activities in Oracle Sales Cloud.</td>
</tr>
<tr>
<td>-target-url (required)</td>
<td>The Oracle Sales Cloud environment against which the command is executed.</td>
</tr>
<tr>
<td>-username (required)</td>
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<tr>
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</tr>
<tr>
<td>-limit (optional)</td>
<td>The import limit.</td>
</tr>
<tr>
<td>-offset (optional)</td>
<td>The import offset.</td>
</tr>
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<td>-wallet (optional)</td>
<td>The Credential Store that holds one set of user credentials (user name and password pair).</td>
</tr>
<tr>
<td>listobjects</td>
<td>List the Sales Cloud objects supported by Oracle Sales Cloud Data Loader.</td>
</tr>
<tr>
<td>-target-url (required)</td>
<td>The Oracle Sales Cloud environment against which the command is executed.</td>
</tr>
<tr>
<td>-username (required)</td>
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</tr>
<tr>
<td>savepassword</td>
<td>Save credential in credential store wallet.</td>
</tr>
<tr>
<td>-username (required)</td>
<td>Specify the Oracle Sales Cloud user name of the user executing the command.</td>
</tr>
<tr>
<td>-config (optional)</td>
<td>The path where the configuration file is located.</td>
</tr>
<tr>
<td>-help (optional)</td>
<td>Display help text containing possible commands.</td>
</tr>
<tr>
<td>status</td>
<td>Retrieve the status of the specified import.</td>
</tr>
<tr>
<td>-import-activity (required)</td>
<td>The import activity to submit.</td>
</tr>
<tr>
<td>-target-url (required)</td>
<td>The Oracle Sales Cloud environment against which the command is executed.</td>
</tr>
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<tr>
<td>submit</td>
<td>Submit file import request in Oracle Sales Cloud.</td>
</tr>
<tr>
<td>-input-file (required)</td>
<td>The name of source CSV file.</td>
</tr>
<tr>
<td>-mapping-number (required)</td>
<td>The mapping number.</td>
</tr>
<tr>
<td>-object (required)</td>
<td>The object to import.</td>
</tr>
<tr>
<td>-target-url (required)</td>
<td>The Oracle Sales Cloud environment against which the command is executed.</td>
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<td>-username (required)</td>
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### Command and Options (Preceded by Hyphen) | Description
--- | ---
-wallet (optional) | The Credential Store that holds one set of user credentials (user name and password pair).
split | Split the import data file into multiple smaller files.
-input-file (required) | The name of source CSV file.
-config (optional) | The path where the configuration file is located.
-help (optional) | Display help text containing possible commands.