Oracle Fusion Cloud Sales Automation

How do I download and use the quick import macro files?

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Get Help

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

Get Help in the Applications

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

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Thanks for helping us improve our user assistance!

1 Overview

Overview of Quick Import

You can use Oracle-provided spreadsheet files to speed up the import of records into Oracle Sales. The files contain macros that import the records for you. All you need to do is enter the information you want imported and validate that it was imported correctly.

You can import up to 5,000 records at a time using the quick import macro files.

Sales Objects You Can Import with Quick Import Macro Files

The quick import macro files are available for these Sales business objects:

Business Object	Where to Find More Information
Accounts and Contacts	*Overview of Account and Contact Import*
Account Hierarchy	*Import Accounts and Account Hierarchies Using the Account Import Macro File*
Leads	*Import Leads Using the Import Macro*
Opportunities	*Overview of Opportunity and Revenue Lines Import*
Products and Product Groups	*Overview of Importing Products and Product Groups*
Users (sales resources)	*Overview of Importing Sales Resources*

2 Import Accounts, Contacts, and Account Hierarchies

Overview of Account and Contact Import

Use the spreadsheet macro files provided by Oracle to import some of your existing sales data so that you can test your sales territory assignment and other features. You import accounts (including account hierarchies) and contacts in separate files, first the accounts, then the contacts, and then the hierarchies.

You can import up to 5,000 records at a time, but you must ensure that each import completes before you start another.

> **Note:** While you can import additional fields by appending columns to import macros, you can't make any other changes. You can't edit the Visual Basic for Applications (VBA) code or other functions.

Here's an overview of your import tasks.

Step	Where to Find More Information
Step 1 Download the spreadsheet macro files and .jar file required for import.	*Download the Import Macro Files for Accounts and Contacts*
Step 2 If you're classifying the accounts by industry in your import, then you must obtain a list of the industry codes for the industry category you're using. You enter the codes along with your account data.	*View the Industry Codes for Accounts*
Step 3 Import your accounts and account hierarchies.	*Import Accounts and Account Hierarchies Using the Account Import Macro File*
Step 4 Import account contacts and stand-alone contacts.	*Import Contacts*
Step 5 Import additional account and contact addresses. To view the additional addresses, you must have the multiple addresses regions exposed in the UI.	*Import Additional Addresses*

What You Import for Accounts and Contacts

Importing account and contact data is somewhat complex compared to importing other objects. That's because customer data, such as organizations, addresses, and contact points, are stored as different objects in the application.

Here's some things to remember about account and contact import:

- To identify it, each object has a unique ID. You can use the IDs to relate the data you import. For example, your account import includes a unique ID for each organization.
- You can enter that unique ID into the contact import file to establish the relationship between the contact and the organization.
- The unique reference ID you add to each record also lets you to update the information later.

What You Import for Accounts

You use the account import macro file to import basic information about the organizations you do business with, such as:

- Organization name
- Account type: The account can be of type customer or prospect. A customer is an account you've sold to in the past.
- Industry classification
- Account owner: The salesperson who owns the account
- Primary address: You can import additional addresses for accounts using a separate macro file.
- Phone
- Fax
- URL
- Parent account: Importing the parent account for each account creates the account hierarchy.

What you import is a subset of what's available in the UI. You might need to import this other information separately:

- Attachments. See *How do I import attachments?*for more information.
- Primary contact information. You use the contact import macro file to import primary contacts.

Here's how the information you see in UI relates to what you import:

- You import the basic account information, including the primary address, using the account import macro.
- You enter the parent account in the account import macro to create the account hierarchy.
- The basic organization information and primary address you import using the account import macro.
- Attachments you import separately (no macro available).
- You import primary contact information using the contact import macro.
- A parent account is imported along with the account.

What You Import for Contacts

You import a contact's basic information. This includes the name, the primary address, phone, and other contact information, as well as the contact owner and the account, if any. You can import multiple addresses for a contact using the separate address import macro.

What are account hierarchies?

Account hierarchies are a structural representation of relationships between accounts. You can use an account hierarchy to represent the structure of accounts of large customers and organizations with multiple layers.

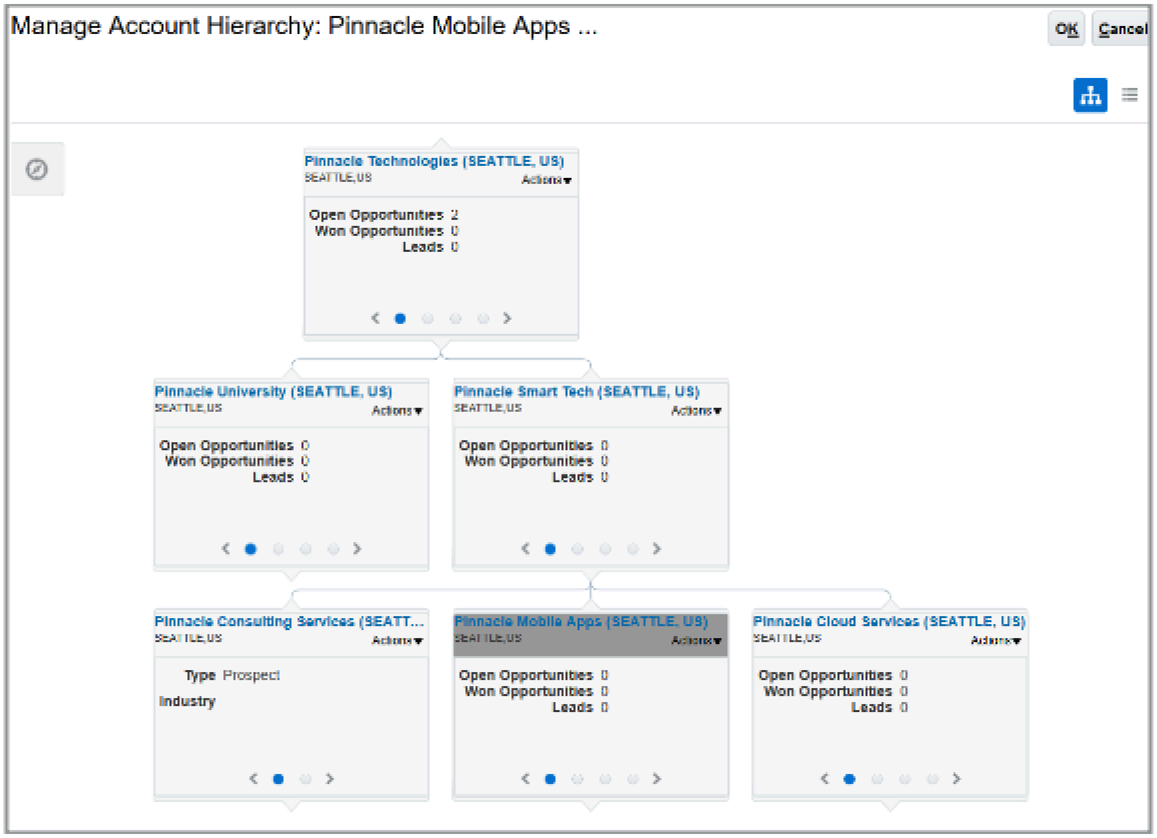
Note these points about account hierarchies:

- In Sales, an account hierarchy doesn't need to match the formal corporate structure of the customer. Instead, it can represent your organization's view of the customer.
- Each account in the hierarchy can have only one parent account.
- Salespeople can use the hierarchy to see the position of a single or multiple accounts in the hierarchy.
- You can use the hierarchy to give specific account directors and other select managers access to accounts and opportunities in the hierarchy that they wouldn't be able to access otherwise.

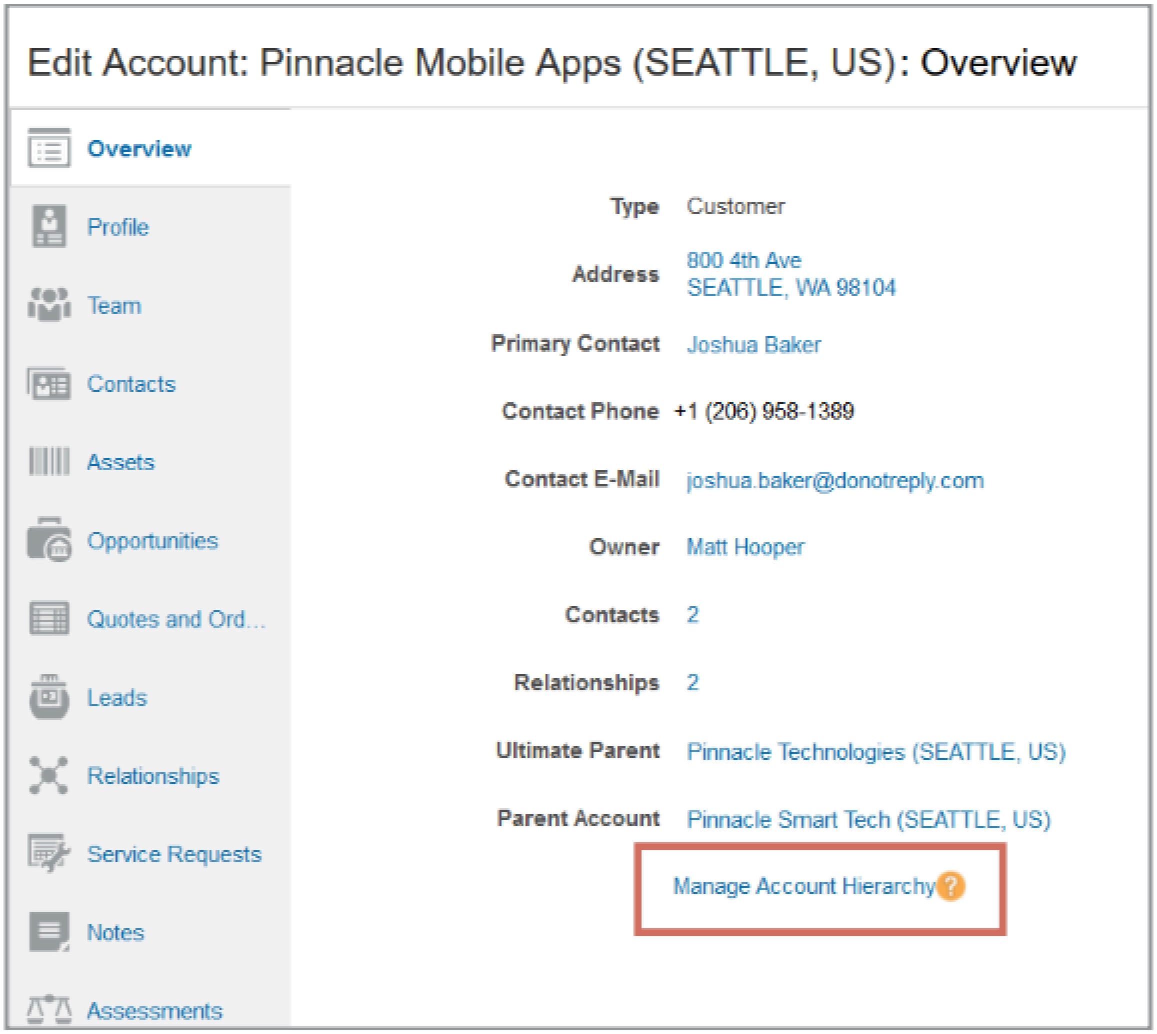
  Accounts for a large multinational corporation, for example, are typically assigned to sales teams in different countries or regions. Because managers in each region can only access information in their own region, no single manager can access all of the accounts and opportunities for the entire multinational corporation.

  By including an account in the territory of a manager, you can give that manager edit access to all accounts and opportunities in the hierarchy below that account. If you include the top account in the territory, the manager gets edit access to all accounts. If you include an account in the middle of the hierarchy, the manager can access only those accounts in that particular branch.
- You can create BI Publisher reports to show revenue for the hierarchy as a whole.

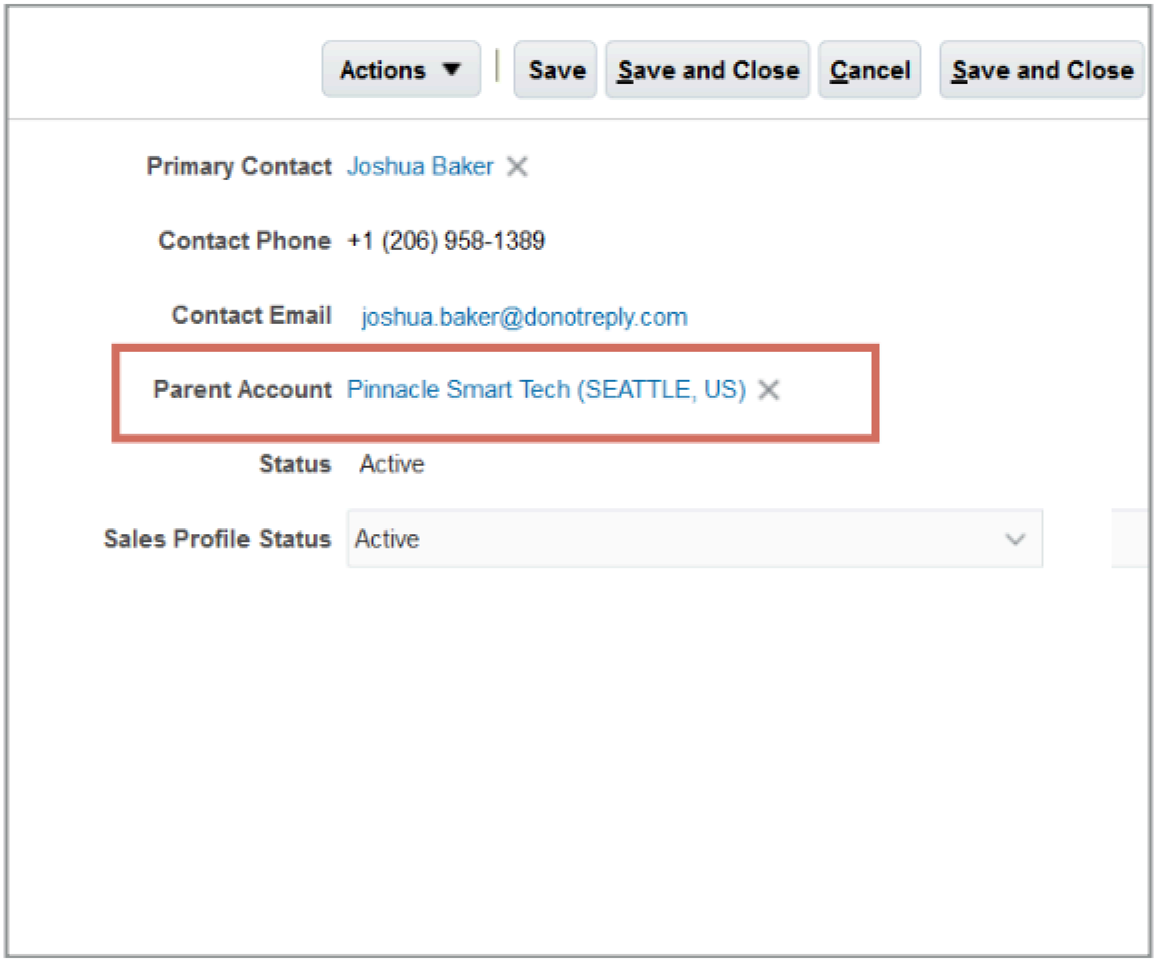
Here's a screenshot of the hierarchy of the fictitious Pinnacle Technologies company and its subsidiaries (classic Sales).



In classic Sales, you can create and maintain the account hierarchy in the UI, by clicking the Manage Account Hierarchy link in the Edit Account page, Overview tab.



You can also build the hierarchy by entering the parent of an account on the Edit Account, Profile tab. Here's a screenshot of the portion of the tab, highlighting the Parent Account field.



Alternatively, you can import the hierarchy as described in the related topics.

Download the Import Macro Files for Accounts and Contacts

When importing accounts and contacts, you import the accounts first, followed by their contacts. Importing the additional account addresses is optional.

Here's how to download the files you need:

1. Sign in to *My Oracle Support*.
2. Search for the document, *Oracle Sales: Download the Import Files (KB171529)*.
3. Download the OracleSalesImportFiles.zip and extract it to a location on your computer.

> **Note:** You can create different folders for the different macro files, as long as each folder includes the `.jar` file.

File Name	Description
`oracle_ucm_client_11.1.1.jar`	You must include this file in the same directory as the import macro.
Account Import Macro	The macro file that you populate with account data.
Contact Import Macro	The macro file that you populate with contact data.
Address Import Macro	Lets you import *additional addresses* for both accounts and contacts. You must expose the multiple address region in the account and contact pages before you import.

View the Industry Codes for Accounts

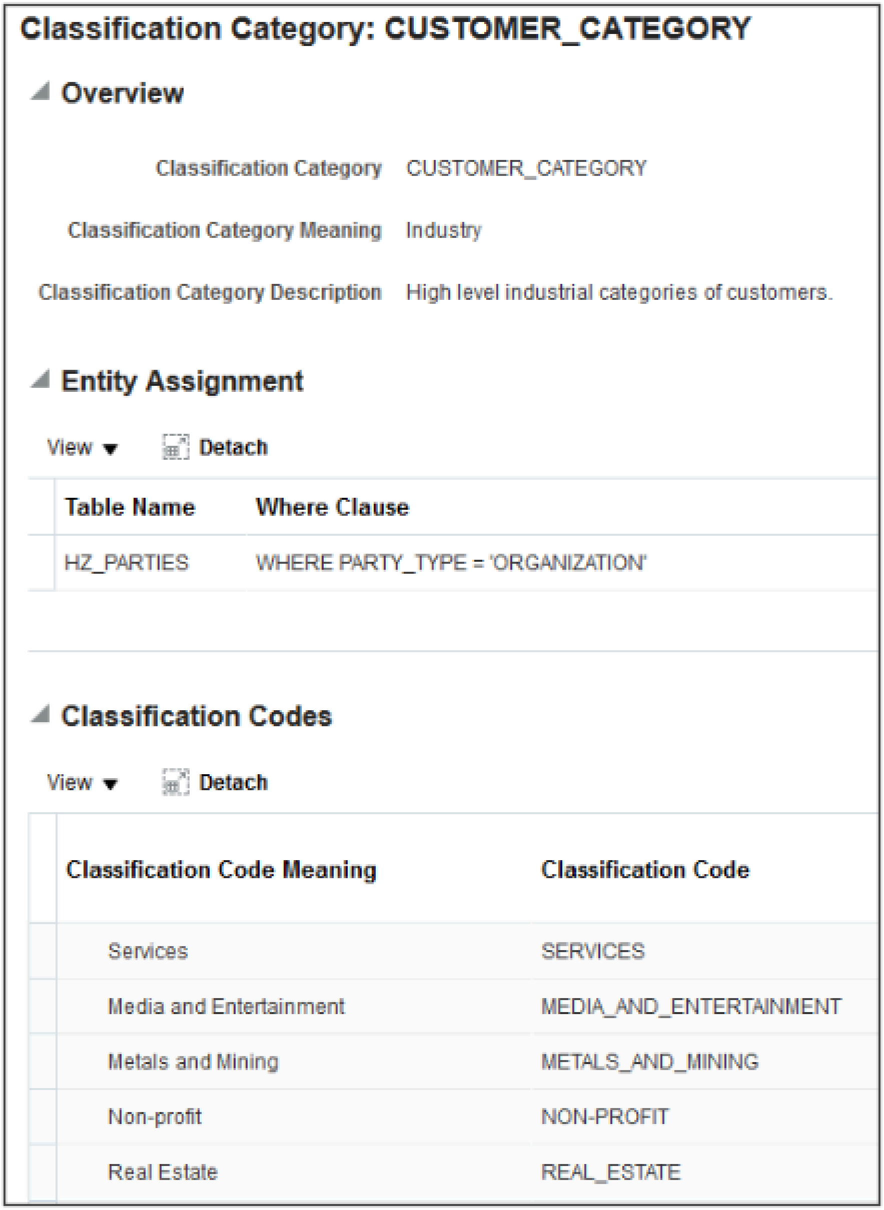
Here's how to find the account classification codes to use in the Industry Code column in the account import macro file.

1. In Setup and Maintenance, go to: **Sales offering** > **Accounts and Contacts functional area** > **Manage Classification Categories task**.
2. In the Search region of the Manage Classification Categories page, enter the classification category name in the Classification Category field. For the default category provided by Oracle, enter `CUSTOMER_CATEGORY`.
3. Click **Search**.

4. Click the classification category name.

   Use the classification codes listed in the Classification Code column on the page for entries in the import macro.

   Here's a screenshot of a part of the Classification Category page for the CUSTOMER_CATEGORY provided by Oracle.



5. Click **Done**.

Import Accounts and Account Hierarchies Using the Account Import Macro File

Here's how you populate the account import macro file with your data and import.

You can enter and import a maximum of 5,000 records at a time. You must wait until a previous import is complete before using the macro file again.

> **Note:** You can modify the macro to import additional fields, including any custom fields you created, using the Attributes Mapping worksheet in the macro.

1. Open the Account Import macro file.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. Click the **Resource EMail to ID Mapping** worksheet.
4. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources who are the owners of the accounts you're importing.

   The Login window appears.
5. In the Login window:
   a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
   b. Enter the user name and password.
   c. Click **Submit**.
6. If you're importing additional fields, including custom fields, then do the following:
   a. Click the **Attributes Mapping** worksheet.
   b. Click **Fetch Attributes from Server**.
   c. In an empty row in the worksheet, select the attribute from the Attribute Name column.
   d. Enter the name you want displayed as the column heading in the Account worksheet. This name displays only in the macro file.
   e. Click **Update Headers** to add the column to the Account worksheet.
7. Click the **Account** worksheet and enter the account data in the columns.

   The address you enter in the worksheet becomes the primary address for the account. If you create sales territories by address, the assignment process uses the primary address to assign territories.

   This table describes the columns:

Column	What to Enter
Account Number	Required, unique ID for the organization. You can leave this field blank and generate the IDs later by clicking **Generate Account Number**.
Account Name	The name of the organization. Entry in this column is required.
D-U-N-S number	The data universal numbering system (D-U-N-S) number from Dun & Bradstreet Corporation.
Account Type	Enter either ZCA_CUSTOMER or ZCA_PROSPECT.

Column	What to Enter
	◦ ZCA_CUSTOMER for organizations you've sold to in the past. ◦ ZCA_PROSPECT for potential customers. If an organization still requires qualification, then you should consider importing the record as a lead instead. If you leave this column blank, then the macro enters ZCA_PROSPECT.
Owner E-Mail	Email address of the salesperson who's the account owner. The email address must be listed on the Resource EMail to ID Mapping worksheet. Entry in this column is required.
Address Number	A unique identifier for the address. If you leave this column blank, then the macro generates the number for you when you import. To reuse an address from another account, you can enter the address number from that address and skip the rest of the address fields.
Address 1	Street address for the primary account address.
Address 2	Additional address information, such as the suite number.
City	City.
State	For the US, enter one of the two-letter state codes.
Postal Code	Postal code.
Country Code	Two-letter ISO code for a country. For example, enter US for the United States, and IN for India. Entry is required.
Address Type	Address types indicate how an address is used. For example, a customer gets billed at the bill-to address and receives the goods at the ship-to address. Address types are displayed only if you enable the display of multiple addresses for accounts. You can import any of the address type codes entered in the lookup type Party Site Use Code (PARTY_SITE_USE_CODE) with the tag SALES_CLOUD. By default, these are the codes available for import: ◦ BILL_TO ◦ SELL_TO ◦ SHIP_TO Oracle Sales doesn't use the address type to drive any logic, but different applications you integrate with might. By default, every account address you create in the application is set to the sell-to address.
Phone Country Code	Country code for the main phone for the organization.
Phone Number	Main phone number. No spaces or delimiters.
Fax Country Code	Fax number country code.

Column	What to Enter
Fax Number	Fax number. No spaces or delimiters.
Email	Email address.
URL	The URL.
Industry Code	The industry code that you retrieved from the application for the classification category that you're using. See *View the Industry Codes for Accounts* for more information.
Named Flag	A Y entry indicates the account is a named account. You can create special assignments for named accounts.
Parent Account Number	Enter the account number of a parent account to create an account hierarchy. You can copy over the IDs from the Account Number column.

8. In the account import macro, click **Create Import Activity**.

   The Login window is already populated with the information you provided earlier.
9. Click **Submit**.
10. Here's what to do if you're prompted to correct errors in your entries:
    a. Click **OK**

       The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Account worksheet.

       Note: After you correct an error, you must click outside the field for the correction to be recognized.
    c. Click **Create Import Activity** and **Submit** again.
11. If the macro data is validated without errors, then the macro displays one of the following messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

12. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window lists the import activity name, ID, and its status.

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - A status of Completed means your import completed successfully.

Here's a video showing the steps:

Watch video

Import Contacts

After the account import process completes, you can import the account contacts. You can import multiple contacts for each account, but you must specify one of the contacts as the primary contact. If you don't identify an account for a contact, the contact gets imported as a standalone contact.

Using the macro file, you can import up to 5,000 contacts at a time. You must ensure each import completes before starting another.

1. Open the Contact Import macro file.
2. Enable macros in the spreadsheet, if required.
3. Select the **Resource EMail to ID Mapping** worksheet.
4. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you'll assign as owners of the contacts you're importing. The contact owner is usually the resource who created the record. Owner entry is required.
5. Sign in on the Login window:
   a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
   b. Enter the user name and password.
   c. Click **Submit**.

   The worksheet now includes both IDs and email addresses of the sales resources in your application. The email doesn't get imported; it just helps you enter the owner.
6. If you're importing additional fields, including custom fields, then do the following:
   a. Click the **Attributes Mapping** worksheet.
   b. Click **Fetch Attributes from Server**.
   c. In an empty row in the worksheet, select the attribute from the Attribute Name column.
   d. Enter the name you want displayed as the column heading in the Contact worksheet. This name displays only in the macro.
   e. Click **Update Headers** to add the column to the Contact worksheet.
7. Enter the contact information in the Contact worksheet. Here's a description of the columns:

Column	What to Enter
Contact Number	Unique ID for the contact. If you leave this required ID blank, the macro automatically generates it for you from the date and time when you import. The application uses the contact number to identify the contact for updates.
Prefix	Enter the contact name prefix. Here are the valid values: ◦ DR. ◦ MISS ◦ MR. ◦ MRS. ◦ SIR
First Name	Contact first name. Entry is required.

Column	What to Enter
Last Name	Contact last name. Entry is required.
Job Title	Contact job title.
Owner E-Mail	Enter the email of the account owner. The email must be one of the email addresses on the Resource EMail to ID Mapping worksheet. An owner is required for every record.
Work Phone Country Code	Country code for the work phone. If you import a work phone and no mobile phone, then the application displays the work phone as the primary phone in the contact and account UI.
Work Phone Number	Phone number. No spaces or delimiters.
Mobile Country Code	Country code for the contact's mobile phone number. If you import a mobile phone number, it automatically becomes the contact's primary number in the contact and account UI.
Mobile Number	Phone number. No spaces or delimiters.
E-mail	Email address.
Address Number	If you don't have a unique ID to enter into this required field, you can leave it blank. The macro generates it for you automatically.
Address 1	Enter a street address unless you're using the account address.
Address 2	Second address line.
Address 3	This column is hidden in the macro.
City	City.
State	State.
Postal Code	Postal code.
Country Code	Two-letter ISO country code. You must enter a country even if you don't enter an address.
Account Number	The account number links the contact to the account. Copy the account number for the contact's organization from the Account Number column in the account import macro file. If you leave this column blank, then the contact is imported as a standalone contact.
Primary Contact Flag	Each account must have one and only one primary contact. You must select **Y** for one of the contacts for each account. The other contacts must have a value of **N**.

8. Click **Create Import Activity**.

   The Login window appears already populated with the information you provided.
9. Click **Submit**.
10. If you're prompted to correct errors, here's what to do:

a. Click **OK**

   The Error worksheet displays your errors.
b. Click each error link in column D and make the correction on the Template worksheet.

   > **Note:** After you correct an error, you must click outside the field for the correction to be recognized.

c. Click **Create Import Activity** and **Submit** again.

11. If the macro data is validated without errors, then the macro displays one of the following messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

12. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID and its status.

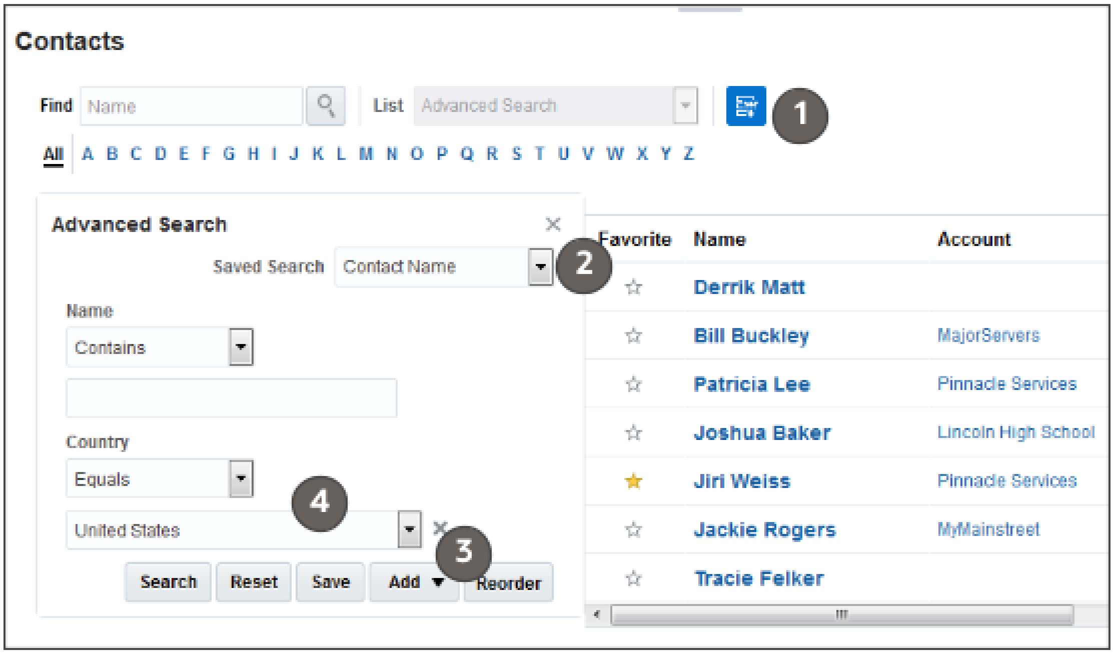
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is Completed.
13. Optionally, click **Generate Log** to save a file listing the contacts that were imported.

Validate the Imported Contacts

You can validate the imported contacts either in the Contacts work area or in Workspace. Here's how to do it in the Contacts work area in classic Sales:

1. Make sure that you're signed in as a sales administrator in the sales organization of the contacts. Sales administrators have broad access to sales data.
2. Open the **Contacts** work area.

3. Click **Advanced Search** (the filter icon, callout 1 in the screenshot) to open the Advanced Search panel.



4. From the **Saved Search** list select **Contact Name** (callout 2).
5. Add United States or the country you imported as an additional filter:
   a. Click **Add** (callout 3) and select **Country**.
   b. Enter the country (callout 4).
6. Click **Search**.

Import Additional Addresses

Here's how to import additional addresses for accounts and for contacts using the address macro file. You must expose the *multiple addresses section in the UI* to view them.

1. Open the Address Import Macro file.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. Review the attributes available for import on the Address worksheet. If you need to import additional address attributes, then:
   a. Click the **Attributes Mapping** worksheet.
   b. Click **Fetch Attributes from Server**.
   c. In an empty row in the worksheet, select the attribute from the Attribute Name column.
   d. Enter the name you want displayed as the column heading in the Address worksheet. This name displays only in the macro file.
   e. Click **Update Headers** to add the column to the Address worksheet.

4. Enter the address data on the Address worksheet.

   This table describes the columns:

Column	What to Enter
Address Number	A unique identifier for the address. If you leave this column blank, then the macro generates the number for you.
Address 1	Enter the street address for the primary account address.
Address 2	Enter additional address information, such as the suite number.
City	City.
State	For the US, enter one of the two-letter state codes.
Postal Code	Postal code.
Country Code	The two-letter ISO code for a country. For example, enter US for the United States, and IN for India. Entry is required.
Address Type	Address types indicate how an address is used. For example, a customer gets billed at the bill-to address and receives the goods at the ship-to address. Address types are displayed only if you enable the display of multiple addresses for accounts. You can import any of the address type codes entered in the lookup type Party Site Use Code (PARTY_SITE_USE_CODE) with the tag SALES_CLOUD. By default, these are the codes available for import: ◦ BILL_TO ◦ SELL_TO ◦ SHIP_TO Oracle Sales doesn't use the address type to drive any logic, but other applications might. By default, every account address you create in the application is set to the sell-to address.
Associated Party Number	Copy the account or contact number from the appropriate macro file to link the address.

5. Import the additional addresses. The process is the same for all the macro files:
   a. Click **Create Import Activity** and sign in.
   b. If you get errors, correct them and import again.
   c. If your import activity was submitted successfully, click **Activity Details**.

      The Activity Details window lists the import activity name, ID, and its status.

      - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
      - A status of Completed means your import completed successfully.

3 Import Products and Product Groups

Overview of Importing Products and Product Groups

To import products and product groups for the Sales Catalog you use Excel files containing macros that Oracle has provided. Using the macros greatly speeds up the creation of your product data.

Here's an overview of the steps:

Step	Where to Find More Information
Step 1 Download the import files.	*Download the Product Import Files*
Step 2 Enter product data and import the products.	*Enter Data into the Product Import Macro and Import*
Step 3 As a checkpoint, you verify the imported products and optionally add images to products.	*Verify Imported Products and Add Product Images*
Step 4 Import the product groups.	*Enter Data into the Product Import Macro and Import*
Step 5 Import the relationship between the products and product groups. In this step, you specify which products belong in which product groups.	*Import the Relationships Between Product Groups and Products*
Step 6 Find the reference number to use when you import the product group structure.	*Get the Reference Number for the Root Product Group*
Step 7 Import the product group hierarchy.	*Import Product Group Hierarchy Information*

Download the Product Import Files

Download the product and product group import files. These four Excel spreadsheets contain macros that let you do the product data import.

> **Note:** This section focuses on importing your product data using Excel files with macros. See the *Understanding Import and Export Management* guide to learn how to import product data without the macros.

Importing products and product groups applies to both classic Sales and Sales in the Redwood UX.

For information about how to create individual products in the UI, start with *Sales Products High-Level Setup Steps*.

Here's how to download the import files:

1. Sign in to *My Oracle Support*.
2. Search for the document, *Oracle Sales: Download the Import Files (KB171529)*.
3. Download the files shown in the following table to a folder on your computer. You can create different folders for the different files, as long as the Product Import Macro folder includes the `.jar` file.

File Name	Description
`oracle_ucm_client_11.1.1.jar`	You must include this file in the same directory as the import macro.
`Product_Import_Macro.xslm`	Import products.
`ProductGroup_Import_Macro.xslm`	Import product groups.
`ProductGroupRelationSetup_Import_Macro.xslm`	Import the product group hierarchy.
`ProductGroupItem_Import_Macro.xslm`	Import the relationship between product groups and products.

Enter Data into the Product Import Macro and Import

Follow these steps to enter data into the Product Import Macro and perform the import. You can import up to 5,000 product records at a time.

1. Open the Product Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. On the UOM worksheet, click **Populate UOM from Server**.
4. On the Login page, enter the following:
    - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/`.
    - Your user name
    - Your password
5. Click **Submit**.

    The macro retrieves the units of measure you set up from your environment and enters them into the worksheet so they're available as the list of values in the Primary UOM field in the Template worksheet.
6. The Product Type worksheet lists the predefined product types that you can use to classify your products. You can update this list using the following steps.

> **Note:** You can skip this step if you haven't created new product type values in the lookup type, QSC_SALES_PRODUCT_TYPE.

a. Click **Populate Product Type from Server**.
b. The Login window still contains the host, user name, and password you entered before, so click **Submit**.

   The macro retrieves the latest product types from your environment and enters them into the worksheet so that they're available as the list of values in the Product Type field in the Template worksheet.

7. To import additional fields, then do the following:
   a. Click the **Attributes Mapping** tab.
   b. Click **Fetch Attributes from Server**.
   c. In the Login window, enter the following:
      - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/`.
      - Your user name
      - Your password

      The macro fetches available product attributes, including any custom attributes you created, from the application.
   d. Add the additional attributes you want to import as follows:
      i. In the Attribute Name column, select the field you want to import.
      ii. In the Column Header column, enter the name you want to appear as the column header in the Product worksheet.
   e. Click **Update Headers**.
8. In the Template worksheet, enter your product data. The macro requires just three pieces of information:
   - Product number
   - Name
   - Primary UOM

   Here are the details for each existing product attribute:

Column	What to Enter
Product Number	You can enter the unique product number of the product or leave this required column blank. If you don't enter a product number, then the macro generates the product number automatically using the date and time. The product number displays in the product records that are visible in the Products work area. The application uses the product number to identify the product record for updates.
Name	The product name as it appears in the sales catalog.
Description	Enter a text description.
Primary UOM	Unit of measure. One of the values in the UOM worksheet.
Product Type	Product type. One of the values in the Product Type worksheet.

<table>
<tr><th>Column</th><th>What to Enter</th></tr>
<tr><td>Eligible to Sell</td><td>Enter <code>Y</code> to make the product appear in the sales catalog and to associate it with product categories.
If you don't make an entry in this column, then the macro automatically populates the value of <code>Y</code>.

A value of <code>N</code> imports the product, but doesn't show it in the catalog or make it available for selection by salespeople.</td></tr>
<tr><td>Eligible for Service</td><td>This column is used only if you're integrating with the Oracle Fusion Service. A value of <code>Y</code> enables service requests for this product. If the product is not eligible for service, then enter <code>N</code>.

If you leave this column blank, then the macro automatically populates the value of <code>Y</code>.</td></tr>
<tr><td>Enable Customer Self-Service</td><td>This column is used only if you're integrating with the Oracle Fusion Service. Enter <code>Y</code> to enable customers to view the product on the self-service portal. Otherwise enter <code>N</code>.

If you leave this column blank, then the application populates an N for products of the following product types:

◦ Extended Warranty
◦ Included Warranty
◦ Preventive Maintenance
◦ Service Level Agreement
◦ Software Maintenance
You can't enter a value of <code>Y</code> for these product types into the macro.

The macro enters a <code>Y</code> for the rest of the product types supplied by Oracle. You must provide a value for any product types you created.</td></tr>
</table>

9. When you're done with your entries, click **Create Import Activity**.
10. If you're prompted to correct errors, here's what to do:
    a. Click **OK**

       The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Template worksheet.

       > **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
    c. Click **Create Import Activity** again.
11. On the Login page, enter the host, user name, and password if required.

12. Click **Submit**.

    The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

13. If your import activity was submitted successfully, click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID, and its status.

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is Completed.
14. Optionally, click **Generate Log** to save a file listing the products that were imported.

Verify Imported Products and Add Product Images

You can verify the products you imported and add images in the Products work area.

Note: You can only include one image for each product.

1. Navigate to the Products work area in Sales.
2. Search for and select the product you want to add an image to.
3. Add the image as an attachment and save your changes.

Import Product Groups

Here's how to import product groups. You can import as many as 5,000 records at a time. Each import must complete before you start another.

1. Open the Product Group Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. In the **ProductGroup** worksheet, enter the product groups in your sales catalog hierarchy, starting at the top of the hierarchy, just underneath the root product group you created earlier. You must enter the parent for each product group.

Here are the details of each column:

Column	What to Enter
Product Group Reference Number	Enter a unique alphanumeric ID up to 50 characters in length. You can enter the product group name without any spaces. For example, if your product group is Green Servers, you can enter `GreenServers`. The macro enters this value as the Product Group Internal Name for each product group. The Product Group Internal Name is visible in the Manage Product Groups task UIs.
Product Group Internal Name	Optionally, enter a product group internal name of up to 150 characters in length, which is also visible in the Manage Product Groups task UI. This field is included for customers who might have lengthy internal IDs for their products. If you leave this field blank, the macro copies the Product Group Reference number into this field.
Product Group Display Name	The name of the product group as it will appear in the sales catalog.
Product Group Description	Enter a text description. This text isn't visible to salespeople when making product selections.
Allow Selection Flag	A Y value in this column means that salespeople can select the product group when entering a customer's product interest in opportunity revenue lines. An N value means they can't.

4. When you're done with your entries, click **Create Import Activity**.
5. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name
   - Your password
6. Here's what to do if you're prompted to correct errors in your entries:
   a. Click **OK**.

      The Error worksheet displays your errors.
   b. Click each error link and make the correction.

      Note: After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click **Create Import Activity** again.
7. Click **Submit**.

   The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.

Message	Meaning
Unable to submit the file import activity. Check log for details.	You most likely entered the wrong mapping number or the user doesn't have the correct permissions. Open the Errors work sheet to view the error details.

8. If your import activity was submitted successfully, then click **Activity Details**.

   The Activity Details window appears, listing the import activity name, its ID, and its status.
   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   - If your import completed successfully, then the status listed is Completed.
9. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

Import the Relationships Between Product Groups and Products

Import the relationship between product groups and products.

Note: You can only relate a product to a product group if the product has the Eligible to Sell option set to `Y`.

1. Open the file `ProductGroup_Import_Macro.xlsm` with the product groups you just imported. You use the product group reference numbers to identify the product groups.
2. Open the `Product_Import_Macro.xlsm` file with the products you imported. You use the product numbers in this file to identify the products.
3. Open `ProductGroupItem_Import_Macro.xlsm`.
4. Make sure macros are enabled in Excel.
5. In the `ProductGroupItem_Import_Macro.xlsm` file, for each product, enter the product group reference number and the product number.
6. When you're done with your entries, click **Create Import Activity**.
7. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name
   - Your password
8. Here's what to do if you're prompted to correct errors in your entries:
   a. Click **OK**.

      The Error worksheet displays your errors.
   b. Click each error link and make the correction.

      Note: After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click **Create Import Activity** again.
9. Click **Submit**.

   The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	You most likely don't have the correct permissions. Open the Errors work sheet to view the error details.

10. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID and its status.

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.
11. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

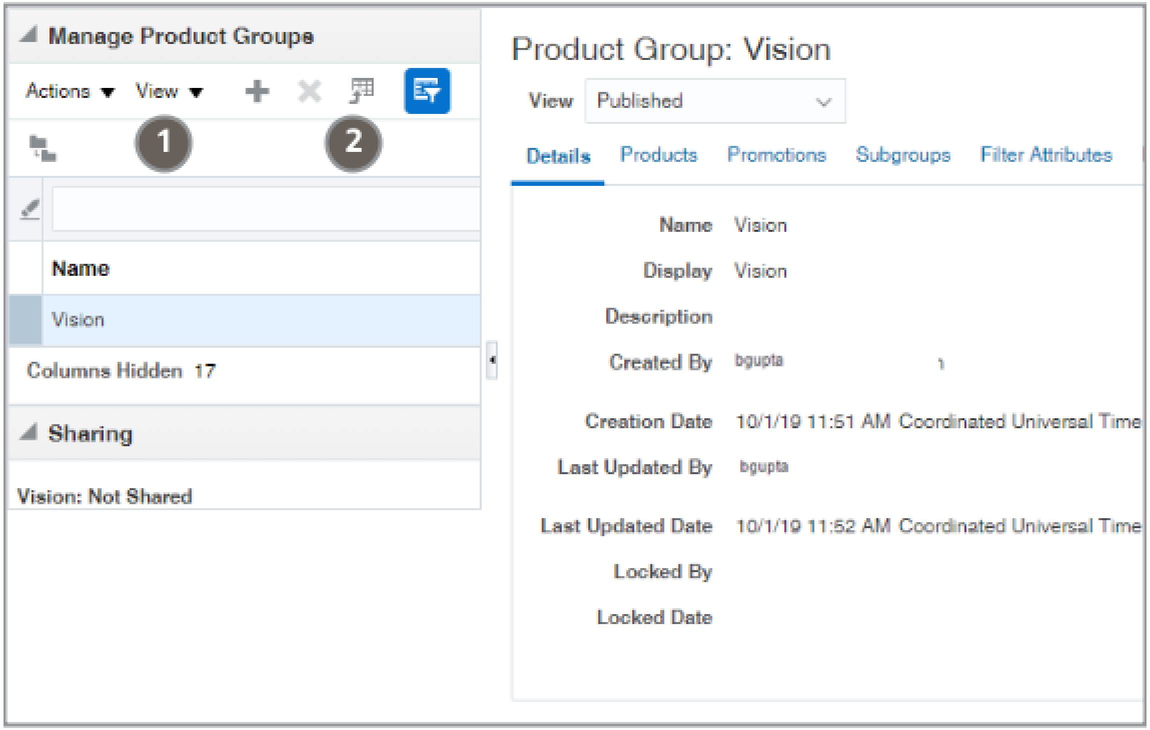
Get the Reference Number for the Root Product Group

Use this procedure to get the product group reference number of the root product group that Setup Assistant created for you. The reference number links the product group hierarchy you're importing to the root product group.

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Catalog and Products functional area** > **Manage Product Groups task**.

2. In the Manage Product Groups page, click **View** and select **Columns**, **Show All** to display all columns.

   Here's a sample screenshot of the Manage Product Groups page highlighting the View menu (callout 1) and the Download to Excel icon (callout 2):



3. Click the **Export to Excel** icon and save the Excel file to your desktop. The reference number you need is in column D.
4. Click **Cancel**.

Import Product Group Hierarchy Information

After importing the product groups themselves, you must import the relationships between them to build the catalog hierarchy.

1. Open the `ProductGroup_Import_Macro.xlsm` file with the product groups you just imported. You use the product group reference numbers to build the hierarchy.
2. Open ProductGroupRelationSetup_Import_Macro.xlsm.
3. Make sure macros are enabled in Excel.
4. In the ProductGroupRelationSetup_Import_Macro, enter the reference number for each product group and the reference number for its parent. For the product groups immediately under the root product group, you must enter the root product group reference number you got from the UI.
5. When you're done with your entries, click **Create Import Activity**.
6. On the Login page, enter the following:

   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name

- Your password

7. Here's what to do if you're prompted to correct errors in your entries:

   a. Click **OK**.

      The Error worksheet displays your errors.

   b. Click each error link and make the correction.

      Note: After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click **Create Import Activity** again.

8. Click **Submit**.

   The application displays one of these messages:

Message	Meaning
`The file import activity was submitted successfully.`	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
`Unable to connect to the server at this time.`	You may have entered an incorrect host.
`Unable to submit the file import activity. Check log for details.`	You most likely don't have the correct permissions. Open the Errors work sheet to view the error details.

9. If your import activity was submitted successfully, then click **Activity Details**.

   The Activity Details window appears, listing the import activity name, its ID and its status.

   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   - If your import completed successfully, then the status listed is `Completed`.

10. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

How can I import additional PIM attributes into Sales products?

While you can't import additional attributes, including descriptive flexfields (DFFs), using the standard scheduled process Import Sales Products From PIM Data Hub, you can create custom fields in the Sales application and then use Import Management to import the additional attributes into them.

For details, see *Import Custom Product Attributes*.

Import Custom Product Attributes

You use Import Management to import your custom product attributes. You can't import additional attributes using the scheduled process Import Sales Products From PIM Data Hub.

> **Note:** If the products are already in PIM, after importing the products, run the Import Sales Products from PIM Data Hub scheduled process.

Prerequisite: Generate Artifacts

You need to generate artifacts before importing custom fields and objects.

1. Go to Application Composer outside of a sandbox.
2. Click **Import and Export** in the navigation menu.
3. Click **Generate**.

You can also generate artifacts on the Generate Import and Export Artifacts subtab, available on the Import Configuration tab in the Import Management area. See: *How do I generate artifacts manually?*

Create the Product Import File, Populate It, and Import the File

Create your import file, populate it with the attributes, and then import the file. See *Import Your Product Data* for more information.

4 Import Leads, Opportunities, and Revenue Lines

Import Leads Using the Import Macro

Here's how to enter your lead data into the macro and import. You can use the macro only to import net new leads. You can't use it to import leads for existing customers or prospects.

You can import up to 5,000 lead records at a time. If you import multiple batches, you must ensure that each import completes before you start another.

> **Note:** You can add import additional attributes by appending columns to the import macro file, but you can't make any other changes. You can't edit the Visual Basic for Applications (VBA) code or other functions.

Here's how to download the files you need:

1. Sign in to *My Oracle Support*.
2. Search for the document, *Oracle Sales: Download the Import Files (KB171529)*.
3. Download the OracleSalesImportFiles.zip and extract it to a location on your computer.

   > **Note:** You can create different folders for the different macro files, as long as each folder includes the `.jar` file.

1. Open the Lead Import Macro file.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. If you're importing additional fields, including custom fields, then:
   a. Click the **Attributes Mapping** worksheet.
   b. Click **Fetch Attributes from Server**.
   c. In an empty row in the worksheet, select the attribute from the **Attribute Name** column.
   d. Enter the name you want displayed as the column heading in the Lead worksheet. This name displays only in the macro.
   e. Click **Update Headers** to add the column to the Lead worksheet.
4. If you changed the lead rank or the lead channel lookup types, then enter the new values in the **Lead Rank** and the **Lead Channel** worksheets.
5. In the Template worksheet, enter your lead data. The import requires you to enter three pieces of information for each lead:
   - Lead name
   - Account name
   - Contact full name

   The macro generates the required lead number after you click **Create Import Activity**.

   You must also include contact information for your inside salespeople to be able to qualify the lead. If you're assigning qualified leads using the state where the business is located, you must include the state in your import or have the inside salespeople enter it as they qualify the lead.

This table describes the available columns:

Column	What to Enter
Lead Number	Leave this required column blank. The macro generates the lead number automatically using the date and time. The application uses the lead number to identify the lead record for updates.
Lead Name	The lead name identifies the lead in the lists that salespeople see in the Leads work area. In the UI, the application automatically enters a lead name as a combination of the contact name and the date and time. You might want to follow the same practice in your import. Entry in this field is required.
Account Name	Organization name. Entry is required.
Contact Full Name	You must enter the contact's first and last names separated by a space.
Job Title	Contact job title.
E-mail	Contact email address.
Phone Country Code	Contact phone country code.
Phone Area Code	Contact phone area code.
Phone Number	Contact phone number with no spaces or delimiters.
Address 1	Contact address line 1. If you convert the lead to an opportunity, then the application uses the address entered in the contact address fields both as the contact address and the account address.
Address 2	Contact address line 2.
City	Contact address city.
State	For US states, enter the two-letter state code.
Province	This column (O) is hidden in the macro file.
ZIP Code	Postal code.
Country	The ISO two-letter code for the country.
Product Group	Enter the Product Group Reference Number. You can copy this number from the macro file that you used to import product groups.
Product	Product name you imported earlier using the product import macro file. If you're importing a product interest for a lead, you can't import a product group at the same time.
Lead Rank	You must use one of the standard values provided by Oracle in the macro file, unless you changed them. The standard values are: ◦ COOL ◦ HOT

Column	What to Enter
	◦ WARM
Lead Channel	You must use one of the standard values provided by Oracle in the macro, unless you changed them. The standard values are: ◦ DIRECT_MAIL ◦ EMAIL ◦ FAX ◦ PHONE ◦ SALES_VISIT ◦ WEB ◦ WIRELESS_MESSAGE ◦ ZSP_MODEL_PREDICTION ◦ ZSP_RULES_PREDICTION

6. In the lead import macro file, click **Create Import Activity**.
7. If you're prompted to correct errors in your entries, do this:
   a. Click **OK**.
   b. Click each error link in column D and make the correction on the Template worksheet.

      Note: After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click **Create Import Activity** again.
8. On the Login page, enter:
   - Host information for your environment.

     The host name is the portion of the URL between the `https://` and `/sales`. You must be signed in and navigate to one of the sales work areas to ensure that the host name is correct. The name on the sign-in page and on setup pages is different.
   - Your user name
   - Your password
9. Click **Submit**.
10. If the macro data is validated without errors, then the macro displays one of the following messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

11. If your import activity was submitted successfully, then click **Activity Details**.

The Activity Details window appears, listing the import activity name, its ID, and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
- If your import completed successfully, then the status listed is Completed.

12. Optionally, click **Generate Log** to save a file listing the leads that were imported.

Overview of Opportunity and Revenue Lines Import

You use two different spreadsheet macro files to import opportunities and opportunity revenue lines.

1. First, you use the Opportunity Import Macro file to import opportunities without revenue lines.
2. Second, you use the Opportunity Revenue Line Import Macro file to import the revenue lines.

You can import up to 5,000 opportunities at a time using the macros.

> **Note:** While you can import additional fields by appending columns to the import macros, you can't make any other changes. You can't edit the Visual Basic for Applications (VBA) code or other functions.

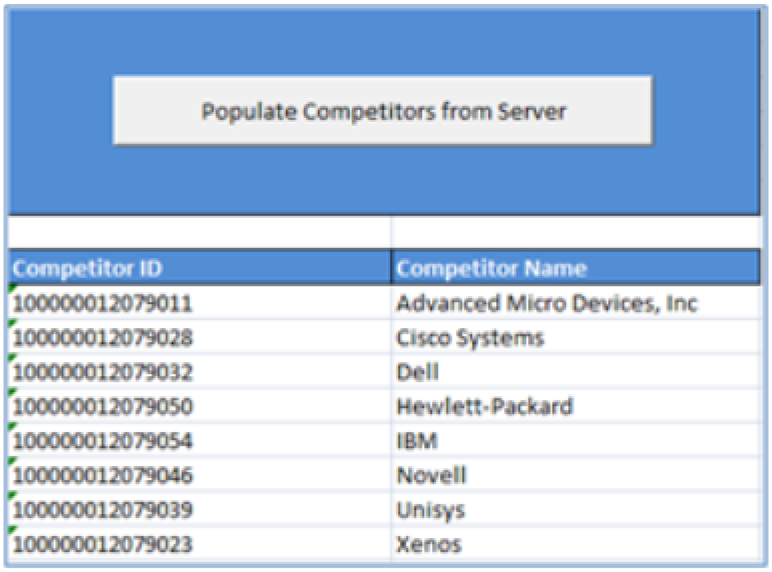
Import Opportunity Information Minus the Opportunity Revenue

Opportunity information that you import includes the account, the opportunity owner, the primary competitor, and so on. You must import the individual revenue lines for the opportunities separately, using the opportunity revenue macro file.

> **Note:** All opportunities that you import with the macro file are imported with the Qualification sales stage and the default sales method. To import opportunities at different stages, you must add the Sales Method and Sales Stage fields to the macro file.

1. Open the opportunity import macro file.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. If you modified opportunity statuses, click the **Status** worksheet and enter the status codes and statuses in the appropriate columns.
4. If you modified the win/loss reasons, click the **Win_Loss_Reason** worksheet and enter the codes and values in the appropriate columns.
5. On the **Competitors** worksheet, click **Populate Competitors from Server**.
6. Make these entries in the Login dialog:
   a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
   b. Enter the user name and password.
   c. Click **Submit**.

   The Competitors worksheet is populated with the competitors and their IDs. Here's a screenshot of the macro file Competitors worksheet.



Populate Competitors from Server

Competitor ID	Competitor Name
100000012079011	Advanced Micro Devices, Inc
100000012079028	Cisco Systems
100000012079032	Dell
100000012079050	Hewlett-Packard
100000012079054	IBM
100000012079046	Novell
100000012079039	Unisys
100000012079023	Xenos

The macro uses this list to validate your entries in the Opportunity worksheet.

7. Click the **Resource_EMail_To_ID_Mapping** worksheet.
8. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources that you'll assign as owners of the opportunities you're importing.

   The Login window appears with the user and password information you entered previously.
9. Click **Submit**. The worksheet populates with the resource data.
10. If you're importing additional fields, including custom fields, then do the following:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the **Attribute Name** column.
    d. Enter the name you want displayed as the column heading in the Opportunity worksheet. This name displays only in the macro file.
    e. Click **Update Headers** to add the column to the Opportunity worksheet.
11. Click the **Opportunity** worksheet.
12. Enter the currency code for your transactions.
13. Enter your opportunity data as described in the following table.

    You must always enter data in these columns:

    - Opportunity Name
    - Account Number
    - Owner E-Mail
    - Expected Close Date
    - Status
    - Creation Date
    - Last Update Date
    - Created By
    - Last Updated By

You might need to enter data in additional columns, depending on your settings and what type of opportunity you're importing.

This table describes the available columns:

Column	What to Enter
Opportunity Number	Leave this required column blank. The macro generates opportunity numbers automatically using the date and time when you click **Generate Opportunity Number**. You must generate opportunity numbers before entering opportunity revenue lines. The application uses the opportunity number to link the opportunity to the revenue lines and to identify opportunities during updates.
Opportunity Name	Entry is required. The opportunity name shows in lists of opportunities in the UI.
Account Number	Enter the account number. You can copy the account number from macro you used to import accounts.
Owner E-Mail	Enter the email of the opportunity owner. The email must be one of the email addresses on the Resource EMail to ID Mapping worksheet.
Win Probability	Optionally, enter a win probability. Depending on your setup, a win probability can determine if an opportunity is included in a forecast. For example, you can decide to include all opportunities with a win probability greater than 70 percent in your forecasts.
Expected Close Date	Enter the expected close date in the following format MM/DD/YYYY. The expected close date determines which forecast includes the opportunity.
Status	Using the list of values, select one of the statuses available on the Status worksheet. You can also enter the statuses manually.
Win/Loss Reason	Using the list of values, enter a win or loss reason for a closed opportunity. If you enter an actual close date, then a win/loss reason is required, depending on the Close Opportunity Win/Loss Reason Required profile option setting.
Primary Competitor	Select the primary competitor from the list of values or enter one of the valid company names manually. For opportunities with a close date, entry in this field is required depending on the profile option setting you made.
Creation Date	Enter the opportunity creation date. The required format is YYYY-MM-DD'T'HH:MM:SS.SSS which stands for Year-Month-Date'Time'Hour:Min:Sec + UTC. You can enter the date as MM/DD/YYYY and have the macro convert your entry into the required format. For example, your entry 2017/01/2005 converts to 2017-01-05T00:00:00.000+0000.
Last Update Date	Enter the date the opportunity was last updated. This date field requires the same format as the creation date. You can enter MM/DD/YYYY, and have the macro convert your entry to the required format.
Created By	Enter the Party Number of the user who created the opportunity. You can copy the Party Number from the Resource EMail to ID Mapping worksheet.

Column	What to Enter
Last Updated By	Enter the Party Number of the user who last updated the opportunity. You can copy the Party Number from the Registry ID column in the file you exported to obtain the Party ID. See the chapter on Importing Accounts and Contacts for details.

14. When you're done with your entries, click **Create Import Activity**.

    The Login dialog appears displaying the host name, user name, and password you entered earlier.
15. Click **Submit**.
16. If the application prompts you to correct errors, then do this:
    a. Click **OK**. The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Opportunity worksheet.

       Note: After you correct an error, you must click outside the field for the correction to be recognized.

    c. Click **Create Import Activity** and **Submit** again.
17. If the macro data is validated without errors then, the macro file displays one of the following messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

18. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID and its status.
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is Completed.
19. Optionally, click **Generate Log** to save a file listing the opportunities that were imported.

Import Opportunity Revenue Lines

You can use the spreadsheet macro file provided by Oracle to import basic information of up to 5,000 opportunity lines at a time.

1. Open the Opportunity Revenue Quick Import Macro file.
2. Enable macros, if required.
3. If you modified opportunity statuses, click the **Status** worksheet and enter the status codes and statuses in the appropriate columns.
4. If you modified the win/loss reasons, click the **Win_Loss_Reason** worksheet and enter the codes and values in the appropriate columns.

5. Click the **Resource_EMail_To_ID_Mapping** worksheet.
6. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you assign as owners of the opportunity revenue lines you're importing.
7. Make these entries in the Login dialog:
    a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
    b. Enter the user name and password.
    c. Click **Submit**.
8. If you're importing additional fields, including custom fields, then do this:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the **Attribute Name** column.
    d. Enter the name you want displayed as the column heading in the Opportunity worksheet. This name displays only in the macro.
    e. Click **Update Headers** to add the column to the Opportunity Revenue worksheet.
9. Click the **Opportunity Revenue** worksheet and enter the revenue lines. You can enter multiple lines for each opportunity. Here's what to enter in the columns:

Column	What to Enter
Revenue Number	Leave this column blank. This unique identifier for the revenue line number is automatically populated by the macro when you start the import by clicking **Generate Import Activity**.
Opportunity Number	Enter the opportunity number linked to the revenue line you're entering. You can copy the number from the Opportunity Number column in the opportunity import macro file.
Product Group Reference Number	This column identifies the sales catalog product group that the customer is interested in purchasing. Enter the Product Group Reference Number from the macro file you used to import product groups. Each revenue line can have either a product group or a product. You can't enter both.
Product Number	You can enter the Product Number to indicate the specific sales catalog product that the customer is interested in buying. You can copy the product number from the product import macro file you used earlier or you can view the product numbers in the Products work area. You can't enter a product if you entered a product group. A revenue line can't have both.
Currency Code	Enter an ISO currency code for the opportunity. For example, USD, EUR, or AUD.
Status	Select the status of the opportunity revenue line from the list of values or enter one of the statuses manually. For example, Open, Won, Lost, or No Sale.
Win/Loss Reason	Using the list of values, enter a win or loss reason for a closed opportunity. If you enter an actual close date, then a win/loss reason is required depending on your profile option setting.
Actual Close Date	For closed opportunities, enter the date the opportunity was closed in the following format MM/DD/YYYY. If you enter a close date, you must also enter a primary competitor and a win/loss reason, depending on the profile option settings you made.

Column	What to Enter
Owner E-Mail	Enter the email of the opportunity revenue line owner. The email must be one of the email addresses on the Resource EMail to ID Mapping worksheet.
Quantity	Enter the number of products or product groups that the customer is interested in.
Estimated Price	Enter the estimated price per unit for the product group or product.
Amount	Leave this column blank. The macro file automatically calculates the amount when you import.

10. When you're done with your entries, click **Create Import Activity**.

    The Login dialog displays the host name, user name, and password you entered earlier.
11. Click **Submit**.
12. If the application prompts you to correct errors, then do this:
    a. Click **OK**

       The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Template worksheet.

       Note: After you correct an error, you must click outside the field for the correction to be recognized.
    c. Click **Create Import Activity** and **Submit** again.
13. If the macro data is validated without errors, then the macro displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

14. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID, and its status.

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.
15. Optionally, click **Generate Log** to save a file listing the opportunities that were imported.

Validate the Opportunities You Imported

You can validate the opportunities you imported using specific filter methods from the Opportunities work area.

1. Sign in as a salesperson with the sales administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Opportunities work area.
3. Enter filter criteria to view and verify that the list of records returned includes your imported opportunities.