

Oracle Fusion Cloud Customer Experience

Integrating Sales with B2C Service



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1 About This Guide

Audience and Scope

This guide is intended for anyone who's involved in integrating Oracle CX Sales with Oracle B2C Service (formerly known as Oracle Service Cloud) component of CX Service.

You must perform the steps in this guide to successfully set up this integration.

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

This document describes features available to users under Oracle CX Sales, and Oracle B2C Service licensing agreements.

Related Guides

The following table lists related guides which provide more information about the integration tasks covered in this guide.

Title of Guide	Guide Description
Getting Started with Your Sales Implementation	Describes how to set up a sales automation solution in CX Sales using a case study to describe concepts and procedures.
Implementing Sales	Describes how to configure and set up CX Sales.
Extending CX Sales and B2C Service	Describes how to use tools to configure CX Sales and B2C Service.
Understanding Import and Export Management for CX Sales and Fusion Service	Describes how to import legacy and other data into CX Sales using the Import and Export Management feature.
Using B2C Service	Describes core features of B2C Service.

2 Introduction

Overview of the Integration

This guide outlines the implementation and configurations steps required to set up an integration between CX Sales and the B2C Service that enables you to accomplish the following:

- Support a seamless exchange of customer, contact, and incident information between the two applications.
- Display (inside CX Sales) all the service requests associated with a specific account, even if they were created in B2C Service.
- Perform a smooth redirection from CX Sales to B2C Service upon drilling down on a service request in CX Sales.

Note: Availability of this integration is currently limited, but if you are interested in exploring the capability of the B2C Service and Customer Data Management integration, we suggest you get in touch with your Oracle Account Manager before proceeding further.

The integration is designed to support customers who want to take advantage of the latest capabilities of the CX Sales application, and use their existing investment in B2C Service. In the integration, accounts and contacts from CX Sales can be synchronized with organizations and contacts in B2C Service. This synchronization is executed using Oracle Cloud Infrastructure as the backbone for mapping and information exchange. Additionally, the integration enables you to synchronize incidents from B2C Service with Service Requests in Fusion Service.

This guide is designed to be used as a template. This guide is a starting point that shows how CX Sales and B2C Service can be connected to create a value-added business process and user experience. You must enter the documented configurations and install the documented patches to create the integration.

However, this integration is not a turnkey solution. Each implementation of CX Sales and B2C Service is unique, and each customer has different needs that have led them to implement application configurations to support their unique business requirements. While the steps in this guide describe how to connect a nonconfigured CX Sales instance to a nonconfigured B2C Service instance, they can be combined with configurations that have already been applied to each instance.

This Oracle Cloud Infrastructure based solution enables subscribers to integrate CX Sales and B2C Service cloud services. For more information on Oracle Cloud Infrastructure, see: <https://docs.cloud.oracle.com/en-us/iaas/Content/home.htm>.

Integration Component Architecture

This guide outlines the integration between CX Sales and B2C Service Integration.

Though the integration is between Oracle CX Sales and the B2C Service of Oracle CX Service, there is no direct communication between the two applications. Instead, all exchange of data is done through Oracle Cloud Infrastructure, which acts as a broker between the two applications.

Bidirectional integration requires some key capabilities such as guaranteed delivery, retry and restart mechanism and so on. Oracle Cloud Infrastructure is a complete, secure, but lightweight integration solution that enables you to

connect your applications in the cloud. It simplifies connectivity between your applications, and can connect both your applications that exist in the cloud and your applications that are still maintained on premises.

This integration manages error handling and guaranteed delivery by introducing concrete fault handling and prevention measures in the integration layer that are realized through Oracle Cloud Infrastructure. The integration domain covers typical elements and integration functionality, such as adapters for connectivity to back-end systems, routing, transformation, and filtering.

Overview of Matching Geographies

Geographies refer to countries, states and provinces, and the way in which each application stores these values.

For the integration to function successfully, both CX Sales and B2C Service must have matching geographies. In other words, countries, states, and provinces defined in one application must match those of the other application. For example, if one application uses two letter codes to define the state or province, the other application must use the same format rather than using full names or a different code. For more information, refer to Appendix D.

Account Synchronization Process Flows

The integration supports the synchronization of Sales Account in CX Sales with Organizations in B2C Service.

- Synchronize Sales Accounts created in CX Sales as organizations in B2C Service
- Synchronize updates made in B2C Service to the previously mentioned organizations with the corresponding Sales Account in CX Sales.

Synchronize CX Sales Accounts with B2C Service

Sales Accounts in CX Sales are propagated to B2C, where they are replicated as Organizations under the following business scenarios and with some constraints:

- Creates and updates on only Sales Accounts that are of type Customer (not type Prospect) are shared from CX Sales to B2C Service.
- When a new sales account (of type Customer) is created in CX Sales, it's replicated as an Organization in B2C Service. If the record is of type Prospect, the record isn't replicated in B2C Service.
- When an existing sales account is promoted from type Prospect to type Customer, the record is replicated as an Organization in B2C Service.
- Only updates to a sales account of type Customer are propagated from CX Sales to B2C Service and applied to the corresponding organization record in B2C Service. Updates to sales account of type Prospect aren't propagated to B2C Service.
- When a sales account of the type Customer is demoted to a Prospect, that demotion isn't reflected in B2C Service.

Synchronize B2C Service Organizations with CX Sales

Organizations in B2C Service are propagated to CX Sales, with the following constraints:

- Organizations that are created in B2C Service are not propagated to CX Sales, both when they are created and also during subsequent updates
- Updates to organizations that originated in CX Sales are shared with B2C Service. The Customer type, is a mandatory attribute in CX Sales. It isn't an attribute in B2C Service, so be aware of the following:

Shared Attributes Between B2C Service and CX Sales

Here's a list of shared attributes between the two data models:

Attribute	Character Length in CX Sales	Character Length in B2C Service	CX Sales to B2C Service Synchronization Details	B2C Service to CX Sales Synchronization Details
Name	360	80	Truncation after 80 bytes	Not applicable
Type	Lookup	Not applicable	Type not stored in B2C Service, so not passed.	
Address.Street	240	240	CX Sales supports 4 lines of 240 characters each. OSvC supports only 1 line of 240 characters. So, all trailing spaces on each of 4 lines are stripped off and the remaining strings concatenated to each other. If the resulting string is longer than 240, truncation occurs after 240 characters.	The entire address from B2C Service is fitted into one line in CX Sales.
Address.City	60	80	The City field is shorter in CX Sales than in B2C Service. So, no possibility of any truncation in CX Sales to B2C Service direction.	There is truncation if the city name is longer than 60 characters.
Address.State	Lookup	Lookup	Makes sure the lookup values are in sync between the two systems. If not, the record will not be synchronized.	Makes sure the lookup values are in sync between the two systems. If not, the record will not be synchronized.
Address.Postal		10		
Address.Country	Lookup	Lookup	Make sure the list of countries are in sync between the two applications to ensure trouble-free synchronization.	Make sure the list of countries are in sync between the two applications to ensure trouble-free synchronization.

Attribute	Character Length in CX Sales	Character Length in B2C Service	CX Sales to B2C Service Synchronization Details	B2C Service to CX Sales Synchronization Details

Contact Synchronization Process Flows

The integration supports the synchronization of Contact data between CX Sales and B2C Service.

Synchronize CX Sales Contacts with B2C Service

Contacts in CX Sales are propagated to B2C Service under the following business scenarios and have some constraints:

- When a new contact is created in CX Sales, it's replicated in B2C Service.
- When an existing contact in CX Sales is updated, the updates are propagated and applied to the corresponding contact in B2C Service.

Synchronize B2C Service Contacts with CX Sales

Here's how Contact records are handled in the B2C Service to CX Sales synchronization:

- Contacts that originate in B2C Service aren't propagated to CX Sales, both when they're created and also during subsequent updates.
- Updates performed in B2C Service to contacts that originated in CX are propagated to CX Sales. Make sure the list of countries and states are synchronized between the two application to ensure smooth synchronizing of records.

Shared Attributes Between B2C Service and CX Sales

Here's a list of shared attributes between the two data models:

Attribute	Character Length in CX Sales	Character Length in B2C Service	CX Sales to B2C Service Synchronization Details	B2C Service to CX Sales Synchronization Details
Address.City	60	80	The City field is shorter in CX Sales than in B2C Service. So, no possibility of any truncation in CX Sales to B2C Service direction.	The city name is truncated if it's longer than 60 characters.
Address.Country	Lookup	Lookup	Make sure the list of countries are in sync between the two applications to ensure trouble-free synchronization.	Make sure the list of countries are in sync between the two applications to ensure trouble-free synchronization.
Address.PostalCode		10		

Attribute	Character Length in CX Sales	Character Length in B2C Service	CX Sales to B2C Service Synchronization Details	B2C Service to CX Sales Synchronization Details
Address.State	Lookup	Lookup	Makes sure the lookup values are in sync between the two systems. If not, the record won't be synchronized.	Makes sure the lookup values are in sync between the two systems. If not, the record won't be synchronized.
E-mail Address		80	E-mail from CX Sales is mapped to the Primary e-mail address on B2C Service.	Primary e-mail takes precedence over Alt1 which takes precedence over Alt2 e-mails addresses.
First Name	150	80	Truncated if longer than 80 characters.	
Last Name	150	80	Truncated if longer than 80 characters.	
Organization	Lookup	Lookup		
Phone Numbers		80	Only Work and Mobile numbers are mapped.	Only Work and Mobile numbers are mapped.

Service Request and Incident Synchronization Process Flows

Not all Incidents that are created or updated in B2C Service are synchronized with CX Sales. Only Incidents that satisfy all of the following criteria get propagated to CX Sales:

- The incident is associated with an Organization.
- The Organization that's associated with the Incident must have been originally created in CX Sales.

Share Attributes Between B2C Service and CX Sales

For Incidents that are actually propagated to CX Sales, only the following attributes are shared:

Attribute	Data Type and Length in B2C Service	Attribute in CX Sales	Data Type and Length in CX Sales	Additional Details
Subject	String (240)	Title	String	
Organization	Long	AccountPartyId		

Attribute	Data Type and Length in B2C Service	Attribute in CX Sales	Data Type and Length in CX Sales	Additional Details
Status	Small Integer	status		<p>The following seeded values map to the appropriate values in CX Sales:</p> <ul style="list-style-type: none"> • Unresolved • Waiting • Updated • Solved <p>Any status value other than these values is set to New by default if it's not mapped in OIC.</p>

Software Requirements for Software Requirements for CX Sales and B2C Service

This topic lists the software requirements for implementing the CX Sales and B2C Service integration using Oracle Cloud Infrastructure.

The software requirements are as follows:

- **Software Requirements for CX Sales:** For the list of supported web browsers for CX Sales, see: <http://www.oracle.com/us/products/system-requirements/overview/index.html>
- **Software Requirements for B2C Service:** The integration is designed to work with B2C Service Release 19D and above. For all documentation related to the latest B2C Service release, see: <https://docs.oracle.com/en/cloud/saas/cx-cloud-suite/index.html>.
- **Software Requirements for Oracle Cloud Infrastructure:** The integration is designed to work with Oracle Cloud Infrastructure version 19.4.3.0.0 or later.

3 CX Sales Configuration

Overview of Customer Data Management Set Up

Perform the following configuration tasks in CX Sales to ensure that Service Requests can't be created or modified. For additional information on performing these tasks, refer to the CX Sales User Guide on Help Center.

1. Set the ZCA_ENABLE_SERVICE_CLOUD_INTEGRATION profile option to Yes,.
2. Disable the SVC_ENABLE_CLICK_TO_EDIT profile option.
3. Remove the SVC_CREATE_SR_PRIV privilege from all sales user roles.
4. Remove the SVC_EDIT_SR_PRIV privilege from all sales user roles.
5. Remove all notification triggers against Service Requests.

Create an Integration User Account

To start the Oracle CX Sales Service Catalog or Event Catalog web services from Oracle Cloud Infrastructure, Oracle recommends that you create a unique user called the Integration User Account user. Use the following procedure to create the new user.

1. Sign in to Oracle CX Sales as an administrator.
2. Click Setup and Maintenance.

The Functional Setup Manager appears.

3. Click the **Setup** drop-down list, and select **Sales**.
4. In the Search Tasks field, enter the following: **Manage Users**, and then click the task link in the results list.
5. Complete the following fields:
 - o **Last Name:** CUSTOMER_OIC_INTEG_USER
 - o **Email:** Enter a valid email address.
 - o **Hire Date:** Enter the current date.
 - o **User Name:** CUSTOMER_OIC_INTEG_USER
 - o **Send user name and password:** Select the check box.
 - o **Person Type:** Employee
 - o **Legal Employer:** Select a valid legal organization from the drop-down list.
 - o **Business Unit:** Select a valid business unit from the drop-down list.
6. Click **Save and Close**.

An email is sent to the email address after the user has been created.
7. Sign out of Oracle CX Sales, then sign back in to the Oracle CX Sales instance using the CUSTOMER_OIC_INTEG_USER user name and the temporary password provided in the notification email.
8. Change the password when prompted when you first sign in.

The Oracle CX Sales Welcome page appears.

9. Sign out from Oracle CX Sales.

Assign Integration Roles

Now you must assign users with the following roles and privileges using Oracle Security Console.

Note: You must have privileges sufficient to create new roles, such as IT Security Manager.

1. Click **Navigator**, and select **Security Console**.
2. Click the **Create Role** button.
3. In the Create Role: Basic Information page, create a new record using the following information:
 - o **Role Name:** ISC Integration Role
 - o **Role Code:** INT_ICS_Integration_Role
 - o **Role Category:** CRM - Job Roles
 - o **Description:** Custom Role for Accessing OSC Services Catalog
4. Click **Next**.
5. In the **Create Role: Functional Security Policies** page, click **Add Functional Security Policy**.
6. In the **Add Function Security Policy** page, enter **FND_MANAGE_CATALOG_SERVICE_PRIV** in the Search box, and click **Add Privilege to Role**.
7. Click **Next**.
8. On the **Create Role: Data Security Policies** page, click **Next**.
9. On the Create Role: Role Hierarchy page, do the following:
 - a. Click **Add role**.
 - b. In the **Search** field, enter **Sales Admin**.
 - c. Select **Sales Administrator**, and then click **Add Role Membership**.
 - d. Close the **Add Role Membership** window.
10. In the **Create Role: Role Hierarchy** page, do the following:
 - a. Click **Add role**.
 - b. In the Search field, enter **SOA operator**.
 - c. Select the **SOA operator** role, and then click **Add Role Membership**.
 - d. Close the **Add Role Membership** window.
11. Click **Next**.
12. In the **Create Role: Users** page, click **Add user** and then do the following:
 - a. In the **Search** field, enter **CUSTOMER_OIC_INTEG_USER**.
 - b. Choose the necessary user, then select **Add user to Role**.
 - c. Close the **Add user** window.
13. Click **Next**, then on the **Summary and Impact** page, review the details, and click **Save and Close**.

4 B2C Service Configuration

Overview of the Configurator

The B2C Service Integration Configurator is a single-page UI and is available only in the BUI client of B2C Service.

The initial two check boxes indicate the type of integration you're setting up.

- **Synchronize Organizations and Contacts with Customer Data Management.** Click this check box if you want to pull in Sales Accounts and Contacts from CX Sales into B2C Service. Additionally, the incidents you associate with these organizations will display as SRs in CX Sales.
- **Use Customer Data Management to cleanse and enrich Contacts.** Check this box if you want to synchronize organizations and contacts with Oracle Customer Data Management Cloud. If you select this option, you can perform a merge in CDM on contacts created in B2C Service and the results will be reflected in B2C Service.

Next there are three areas, which correspond to the areas that you're integrating. These areas are:

- **Service.** Enter a user name and password.
Note: The user name you use for this set up, must not be an actual B2C Service user. Create a unique user name and password for this set up task.
- **Customer Data Management.** Enter the URL of your CDM instance, then enter a user name and password. It can be any valid user name and password combination, but the specified user must have sufficient privileges in CDM.
- **Oracle Integration Cloud.** Enter the URL of your Oracle Cloud Infrastructure instance and enter a user name, password, and then select the PAR file.

Use the Configurator

Here's how you use the Configurator to set up your B2C Service and CX Sales integration.

Note: You should have already downloaded a required PAR file from Oracle and saved it to your local drive. You will need to access this file during this procedure. The PAR file has all the predefined logic and flows to facilitate the integration.

1. Open the Configurator.
2. There are two check boxes. Do the following, depending on your business requirements:
 - a. Click the first check box, the **Synchronize Organizations and Contacts with Customer Data Management** check box, if you want to pull in Sales Accounts and Contacts from CX Sales into B2C Service. Additionally, the incidents you associate with these organizations will display as SRs in CX Sales..
 - b. Click the second check box, the **Use Customer Data Management to cleanse and enrich Contacts** check box if you want to integrate B2C Service with Oracle Customer Data Management. There are few additional things to know:

- This option only pertains to B2C Service and CDM.
 - If you select this option, any contact or organization you create in CDM won't be sent to B2C Service.
 - If you select this option, you can perform contact merge in CDM on contacts created in B2C Service and the results will be reflected in B2C Service.
3. In the **Service** area, do the following:
 - a. Enter a user name: This user name must not be an actual B2C user name. Create a unique user name for this integration only.
 - b. Enter a password. Create a unique password for this user name.
 4. In the **Customer Data Management** area, do the following:
 - a. Enter the URL of your CDM instance, and then click **Test Connection**. The URL was included in your welcome email.
 - b. Enter a valid CDM user name that has already been created in CX Sales or in CDM.
 - c. Enter the password.
 5. In the **Oracle Integration Cloud** section, do the following:
 - a. Enter the URL of your Oracle Cloud Infrastructure instance, and then click **Test Connection**. The URL as well as the Administrator ID, and password was included in your welcome email.
 - b. Enter the administrator user name and password.
 6. In the **PAR file** area click **Choose File** and navigate to the folder where you saved the file.
 7. Click **Activate**.

5 Appendix A: Optional Manual Configuration of B2C Service

About Manual Configuration

You should resort to manual configuration only when you don't use the BUI client and therefore don't have access to the Configurator.

It's recommended that you perform all integration configuration using the Configurator. The integration and all included flows are designed to be set up using the Configurator. Manual configuration of B2C Service and Oracle Cloud Infrastructure isn't recommended.

Verify Functionality to Publish Business Events

The integration between Oracle B2C Service and Oracle CX Sales requires that the following prerequisite tasks be completed.

1. Sign in to the Oracle B2C Service application as a user with administrator privileges.
2. On the Navigation pane, click **Configuration, Site Configuration**, and then **Configuration Settings**.
3. In the Configuration Base field select the **Site** check box.
4. In the Key field enter a wildcard string such as "EVENT%" Note that this searches for and return all strings beginning with EVENT.
5. Click **Search**.

If several configuration parameters beginning with EVENT_ are displayed, such as, EVENT_NOTIFICATION_ENABLED, then the functionality to publish events is available in your version of Oracle B2C Service.

Enable Events to be Published to External Applications

The integration between Oracle B2C Service and Oracle CX Sales requires that the following prerequisite task be completed.

1. In the search results page displayed in the previous task, verify that the following six event configuration parameters are present:
 - o EVENT_NOTIFICATION_ENABLED
 - o EVENT_NOTIFICATION_MAPI_SEC_IP_RANGE
 - o EVENT_NOTIFICATION_MAPI_CSUSER
 - o EVENT_NOTIFICATION_MAPI_PASSWD

- EVENT_NOTIFICATION_SUBSCRIBER_USERNAME
- EVENT_NOTIFICATION_SUBSCRIBER_PASSWD

2. Select **EVENT_NOTIFICATION_ENABLED**.

This is a Boolean parameter. It is the global switch that controls whether or not business events from Oracle B2C Service are published to external applications. The default value is **No**, which means that events are not published to external applications.

3. Set the value to **Yes** if it is not already set.
4. Click **Save and Close**.

Set the IP Range for Incoming Messages

By default, the configuration parameter EVENT_NOTIFICATION_MAPI_SEC_IP_RANGE is null (empty).

This parameter enables incoming messages to be honored only if originating from a specific IP addresses. This is an optional parameter. If the field is not populated, no IP restrictions are enforced and requests from any IP address is honored.

Note: This task is optional.

If the parameter has even one value, in other words, if it is not null, only requests from the specified IP address are accepted.

If it is necessary to limit the address or addresses from which requests should be accepted, enter the addresses as a comma-separated list.

1. From the list of configuration parameters, click **EVENT_NOTIFICATION_MAPI_SEC_IP_RANGE**.
2. Enter the list of IP addresses as comma-separated values.
For example, 121.110.54.12, 135.87.76.45 and so on.
3. Click **Save and Close**.

Set Credentials for Incoming Requests

Two configuration parameters, EVENT_NOTIFICATION_MAPI_USERNAME and EVENT_NOTIFICATION_MAPI_PASSWD store the credentials used by the external applications when invoking RightNow web services for either subscription requests or transactional requests. As neither parameter has a default value, you must specify a value for each.

The EVENT_NOTIFICATION_MAPI_USERNAME configuration parameter stores the UserID that is specified on the header of incoming request.

The EVENT_NOTIFICATION_MAPI_PASWD parameter stores the password associated with the UserID specified in incoming request.

Note: The password is stored in an encrypted format for security purposes.

1. From the list of configuration parameters, click **EVENT_NOTIFICATION_MAPI_USERNAME**.

2. Specify the user name and save the changes.
3. From the list of configuration parameters, click **EVENT_NOTIFICATION_MAPI_PASSWD**.
4. Specify the password and save the changes.

Set Credentials for Outgoing Requests

Two configuration parameters, `EVENT_NOTIFICATION_SUBSCRIBER_USERNAME` and `EVENT_NOTIFICATION_SUBSCRIBER_PASSWD` store the credentials to be used by Oracle B2C Service when sending event notifications to the external subscriber. As neither parameter has a default value, you must specify a value for each.

The `EVENT_NOTIFICATION_SUBSCRIBER_USERNAME` configuration parameter stores the User ID that must be used on the event notification message sent to the external application that has subscribed to the event.

The `EVENT_NOTIFICATION_SUBSCRIBER_PASWD` stores the password associated with the User ID specified in the previous task.

Note: The password is stored in an encrypted format for security purposes.

1. From the list of configuration parameters, click **EVENT_NOTIFICATION_SUBSCRIBER_USERNAME**.
2. Specify the user name and save the changes.

Note: Make sure the user name you chose is also defined in Oracle Cloud Infrastructure.

3. From the list of configuration parameters, click **EVENT_NOTIFICATION_SUBSCRIBER_PASSWD**.
4. Specify the password and save the changes.

6 Appendix B: Optional Manual Configuration of Oracle Cloud Infrastructure

About Manual Configuration

You should resort to manual configuration only when you don't use the BUI client and therefore don't have access to the Configurator.

It's recommended that you perform all integration configuration using the Configurator. The integration and all included flows are designed to be set up using the Configurator. Manual configuration of B2C Service and Oracle Cloud Infrastructure isn't recommended.

Import the Oracle Cloud Infrastructure Integration Flows

The first step when setting up for Oracle Cloud Infrastructure-based integration is to import the Oracle Cloud Infrastructure integration flows.

To import the required CX Sales and B2C Service integration flows you must download the Oracle Cloud Infrastructure integration flow package to your local computer.

The required Oracle Cloud Infrastructure integration flow package file is: OSVC_OEC_CDM.par.

1. Sign in to the Oracle Cloud Infrastructure instance.
2. On the Welcome page, click the **Packages** icon.
3. On Package page, click the **Import Package** button.
4. On Import Package File dialog box, click **Browse** and then select OSVC_OEC_CDM.par, then click **Import Package**.

This creates all the integration flows contained within the package as well as the connections to CX Sales and B2C Service.

Configure Integration Connections

The integration between B2C Service and Oracle requires that the following prerequisite tasks be completed.

Configuring a Connection to the Oracle Instance

First you configure the connection to the Oracle instance.

1. On the Oracle Cloud Infrastructure homepage, click the **Connections** icon.
2. On the Connections page, make sure that REST Connection appears.
3. Click the entry to view the Oracle connection detail page.

4. Click the **Configure Connectivity** button and in the Connection Properties window, enter the values listed in the following table.

The following table lists Oracle connection properties and the required values of each.

Property Name	Property Value
Connection Type	Enter the REST API base URL.
TLS Version	
Connection URL	
Enable two way SSL for outbound connections	
Identify keystore alias name	
Security Policy	
User name	
Password	

5. Click **OK**.
6. Click the **Configure Credentials** button, and in the Credentials window, enter the following values:
 - o Security Policy: User name Password Token.
 - o User name: CUSTOMER_OIC_INTEG_USER.
 - o Password: Enter the password.
 - o Confirm Password: Reenter the password.
7. Click **OK**.
8. Click the **Test** icon on the Oracle Cloud Infrastructure Connection Configuration page.
9. When the status meter shows 100% Complete, click **Save**.
10. Click the **Exit** button.

Configure the Connection to the B2C Service Instance

After configuring the connection to the Oracle instance, you then configure the connection to the B2C Service instance.

1. Sign in to the Oracle Cloud Infrastructure instance.
2. On the Home page, click the **Connections** icon.
3. On the Connections page, make sure that B2C Service appears.
4. Click the Service Cloud entry to view the B2C Service connection detail page.
5. Click the **Configure Connectivity** button and in the Connection Properties window, enter the values listed in the following table.

The following table lists the required connection properties for B2C Service.

Property Name	Property Value
OSC Service Catalog WSDL URL	<p>Enter the Service Catalog URL from your B2C Service instance.</p> <p>For example: <code>https://datasync-162-rel12.qb.lan/cgi-bin/datasync_162_rel12.cfg/services/soap?wsdl=typed_v1.3</code></p>

6. Click **OK**.
7. Click the **Configure Credentials** button, and in the Credentials window, enter the following values:
 - o Security Policy: User name Password Token.
 - o User name: Enter the user name.
 - o Password: Enter the password.
 - o Confirm Password: Confirm the password.
8. Click **OK**.
9. Click the **Test** icon on the Oracle Cloud Infrastructure Connection Configuration page.
10. When the status meter shows 100% Complete, click **Save**.

Activate the Integration Package

To activate the integration flows you must have successfully imported the OSC_SVC integration package and configured CX Sales and B2C Service connections.

1. Sign in to Oracle Cloud Infrastructure instance.
2. On Home page click **Integrations** icon.
3. Locate OSVC_CDM_ORGANIZATION_CREATE, and click the **Active** button.
4. Check the **Enable detail tracing** check box and click the **Active** button on the confirmation dialog window.
5. Ensure the flow was activated successfully.
6. Repeat the active steps for the following integration flows:
 - o OSVC_OEC_ACCOUNT_UPDATE

- OSVC_CDM_ORGANIZATION_DELETE
- OSVC_CDM_CONTACT_CREATE
- OSVC_OEC_CONTACT_UPDATE
- OSVC_CDM_CONTACT_DELETE
- OSVC_OEC_SERVICE_REQUEST_CREATE
- OSVC_OEC_SERVICE_REQUEST_UPDATE
- OSVC_OEC_SERVICE_REQUEST_DELETE
- OEC_CDM_OSVC_ORG_CONTACT_CREATE_UPDATE
- OEC_CDM_OSVC_ORGANIZATIONS_BATCHED_CREATE
- OEC_CDM_OSVC_ORGANIZATION_SINGLE_CREATE
- OEC_CDM_OSVC_ORGANIZATIONS_BATCHED_UPDATE
- OEC_CDM_OSVC_ORGANIZATION_SINGLE_UPDATE
- OEC_CDM_OSVC_CONTACTS_BATCHED_CREATE
- OEC_CDM_OSVC_CONTACT_SINGLE_CREATE
- OEC_CDM_OSVC_CONTACTS_BATCHED_UPDATE
- OEC_CDM_OSVC_CONTACT_SINGLE_UPDATE

After activation, verify that the integration synchronization is functional. Do this, for example, by creating or updating an account or contact record in the CX Sales. This action should automatically synchronize the record to B2C Service. Additionally, create or update an organization or contact record in the B2C Service. This action automatically synchronizes the record to CX Sales.

Note: The synchronization from B2C to CX Sales typically completes within about a minute. However, the synchronization from CX Sales to B2C Service can take several minutes, depending on a variety of factors.

7 Appendix C: Field Mapping

Account Field Mapping

The following table lists the required values for mapping Account fields between CX Sales and B2C Service.

B2C Service Attribute	B2C Service Data Type	CX Sales Attribute	CX Sales Data Type	Condition
Name	Organization Name String (80)	OrganizationName	VARCHAR2 (360)	Not applicable.
Address.Street	Address.Street String (240)	PrimaryAddress.AddressLine + ' ' + PrimaryAddress.AddressLine + ' ' + PrimaryAddress.AddressLine + ' ' + PrimaryAddress.AddressLine	VARCHAR2 (240) VARCHAR2 (240) VARCHAR2 (240) VARCHAR2 (240)	if PrimaryAddress.Country != null
Address.StateOrProvince.Name	Address.StateOrProvince.Name String (255)	PrimaryAddress.Province PrimaryAddress.State	VARCHAR2 (60) VARCHAR2 (60)	If PrimaryAddress.Country != null then { If Province != null then Province If State != null then State }
Address.City	Address.City String (80)	PrimaryAddress.City	VARCHAR (60)	If PrimaryAddress.Country != null
Address.Country.Name	Address.Country.NamedID.N String (255)	PrimaryAddress.Country	VARCHAR (2)	If PrimaryAddress.Country != null
Address.PostalCode	Address.PostalCode String (10)	PrimaryAddress.PostalCode	VARCHAR2 (60)	If PrimaryAddress.Country != null
AddressType.Name	AddressType.Name String (255)	No analog in CX Sales to this required B2C Service field.	Not applicable.	Not applicable.

B2C Service Attribute	B2C Service Data Type	CX Sales Attribute	CX Sales Data Type	Condition
The default value in the UI is Billing.				
Address.Action The default value in the UI is Add.	Address.Action	Not applicable.	Not applicable.	Not applicable.

Contact Field Mapping

The following table lists the required values for mapping Contact fields between CX Sales and B2C Service.

B2C Service Attribute	B2C Service Data Type	CX Sales Attribute and Data Type	CX Sales Data Type	Condition
Name.First	PersonName.First String (80)	FirstName	VARCHAR2 (150)	Not applicable
Name.Last	PersonName.Last String (80)	LastName	VARCHAR2 (150)	Not applicable
Address.Street	Address.Street String (240)	PrimaryAddress.AddressLine1 + ';' + PrimaryAddress.AddressLine2 + ';' + PrimaryAddress.AddressLine3 + ';' + PrimaryAddress.AddressLine4	VARCHAR2 (240) VARCHAR2 (240) VARCHAR2 (240)	if PrimaryAddress.Country != null
Address.StateOrProvince.Name	Address.StateOrProvince.Name String (255)	PrimaryAddress.Province PrimaryAddress.State	VARCHAR2(60) VARCHAR2(60) Constraints: CX Sales can accept any number of characters for the state field but B2C Service accepts only two letters, such as OR, or CA.	If PrimaryAddress.Country != null If Province != null then Province If State != null then State
Address.City	Address.City	PrimaryAddress.City	VARCHAR (60)	If PrimaryAddress.Country != null

B2C Service Attribute	B2C Service Data Type	CX Sales Attribute and Data Type	CX Sales Data Type	Condition
	String (80)			
Address.Country.Name	Address.Country.NamedID.N String (255)	PrimaryAddress.Country	VARCHAR (20)	If PrimaryAddress.Country != null
Address.PostalCode	Address.PostalCode String (10)	PrimaryAddress.PostalCode	VARCHAR2 (60)	If PrimaryAddress.Country != null
Emails.EmailList.Address	EmailList.Email.Address String (80)	EmailAddress VARCHAR (320)	VARCHAR (320)	if EmailAddress != null
Emails.EmailList.AddressType The default value in the UI is 0.	EmailList.Email.AddressType Long	Not applicable	Not applicable	if EmailAddress != null
Phones.PhoneList.Number	Phones.PhoneList.Number String (40)	FormattedWork PhoneNumber	VARCHAR2 (40) Constraints : The PHONE_COUNTRY_CODE must be valid and can contain up to three characters. Other fields can accept up to maximum length. The FormattedWorkPhone Number field can have a maximum size of up to 40 characters and be accepted in B2C Service.	if FormattedWorkPhone Number !=null
Phones.PhoneList.PhoneType Then default value in the UI is 0.	PhoneList.Phone.PhoneType Long	Not applicable	Not applicable	if FormattedWork PhoneNumber != null
Phones.PhoneList.Number	Phones.PhoneList.Number String (40)	FormattedMobile Number	VARCHAR2 (40) Constraints: The PHONE_EXTENSION field is not available in the UI. Other constraints are the same as those of the FormattedWorkPhone Number field.	if FormattedMobile Number != null

B2C Service Attribute	B2C Service Data Type	CX Sales Attribute and Data Type	CX Sales Data Type	Condition
Phones.PhoneList.PhoneType The default value in the UI is 1.	PhoneList.Phone.PhoneType Long	Not applicable	Not applicable	if FormattedMobile Number != null
Phones.PhoneList.Number	Phones.PhoneList.Number String (40)	FormattedFaxNumber	VARCHAR2(40) Constraints: The same as those of FormattedWork PhoneNumber	if FormattedFaxNumber != null
Phones.PhoneList.PhoneType The default value in the UI is 2.	PhoneList.Phone.PhoneType Long	Not applicable	Not applicable	if FormattedFaxNumber != null
Phones.PhoneList.Number	Phones.PhoneList.Number String (40)	FormattedHome PhoneNumber VARCHAR2(40) Constraints: The same as those of FormattedWorkPhoneNumber	VARCHAR2(40) Constraints: The same as those of FormattedWork PhoneNumber	if FormattedFax Number != null
Phones.PhoneList.PhoneType The default value in the UI is 4.	PhoneList.Phone.PhoneType Long	Not applicable	Not applicable	if FormattedHome PhoneNumber != null
Organization.ID	Nameld.id Long	Enrich (Account PartyId)	Long	Not applicable
External Reference	Long	PartyId	NUMBER (18)	Not applicable

8 Appendix D: Additional Manual Configuration

About Manual Configuration

You should resort to manual configuration only when you don't use the BUI client and therefore don't have access to the Configurator.

It's recommended that you perform all integration configuration using the Configurator. The integration and all included flows are designed to be set up using the Configurator. Manual configuration of B2C Service and Oracle Cloud Infrastructure isn't recommended.

Configure the CountryWithProvince Lookup

The CX Sales to B2C Service prebuilt integration makes use of a lookup which contains the list of countries configured to store in CX Sales, Address Region data in the Province field rather than the State field.

If you have configured address formats in CX Sales then this default lookup must be updated to reflect your configurations so that addresses coming from B2C Service are properly stored in CX Sales.

1. In your installation package, access the following lookup script.
 - (Linux) Scripts/ICS_Customization/Linux/getCountriesWithProvince.sh
 - (Windows) Scripts/ICS_Customization/Windows/getCountriesWithProvince.ps1

2. Run the Linux script as follows:

```
sh getCountriesWithProvince.sh <CRM domain hostname> CUSTOMER_OIC_INTEG_USER <CUSTOMER_OIC_INTEG_USER password>
```

3. Run the Windows script as follows:
4. The script creates a file called: CountryWithProvince.csv.

```
.\getCountriesWithProvince.ps1 <CRM domain hostname> CUSTOMER_OIC_INTEG_USER <CUSTOMER_OIC_INTEG_USER password>
```

5. Save this file locally.
6. Sign in to your Oracle Cloud Infrastructure instance and navigate to the **Lookups** section.
7. Verify that the CountryWithProvince lookup is present.
8. Click **Import Lookup**, then do the following:

- Select the CountryWithProvince.csv file you saved, and then click **Import**.
- Click **Yes** on the Import Confirmation prompt to overwrite the existing lookup.

If the import was successful, a confirmation message appears.

Add Validation Rules to a Field

To accommodate data model differences between CX Sales and B2C Service you can add validation rules to CX Sales fields to avoid the possible truncation of attributes.

1. Navigate to Navigator, Tools, click Customization, and then select **Application Composer**.
2. Select the Common application from the Application drop-down list.
3. In the Objects menu, expand Standard Objects, then expand the Account object for which you want to create the validation rule, and then click **Server Scripts**.

In the Server Scripts window, the Validation Rules tab is shown by default.

4. In the Object Rules area, click the **Add a new validation rule** icon.
5. In the Create Object Validation Rule window, create validation rules for the available fields using the information contained in the tables.

The following table lists required options for the OrganizationName field.

OrganizationName Field Options	Description
Rule Name	O_INT_SVC_OrganizationNameValidation
Error Message	The first name has more than 80 characters, which is the maximum allowed.
Definition	<code>return (length(OrganizationName) <= 80)</code>

The following table lists required options for the ContactFirstName field.

ContactFirstName Field Options	Description
Rule Name	O_INT_SVC_FirstNameValidation
Error Message	The first name has more than 80 characters, which is the maximum allowed.
Definition	<code>return (length(PersonFirstName) <= 80)</code>

ContactFirstName Field Options	Description

The following table lists required options for the ContactLastName field.

ContactLastName Field Options	Description
Rule Name	O_INT_SVC_LastNameValidation
Error Message	The last name has more than 80 characters, which is the maximum allowed.
Definition	<code>return (length(PersonLastName) <= 80)</code>

The following table lists required options for the EmailAddress field.

EmailAddress Field Options	Description
Rule Name	O_INT_SVC_EmailAddressValidation
Error Message	The e-mail address has more than 80 characters, which is the maximum allowed.
Definition	<code>return (length(PrimaryEmailAddress) <= 80)</code>

The following table lists required options for the FormattedWorkPhoneNumber field.

FormattedWorkPhoneNumber Field Options	Description
Rule Name	O_INT_SVC_FormattedWorkPhoneNumberValidation
Error Message	The work phone has more than 40 characters, which is the maximum allowed.
Definition	<code>def phones = Phone while (phones.hasNext()) {</code>

FormattedWorkPhoneNumber Field Options	Description
	<pre>def phone = phones.next() if (phone?.PhoneType == 'WORK' && phone?.PhoneNumber != null && length(phone?.FormattedPhoneNumber) > 40) return false } return true</pre>

The following table lists required options for the FormattedMobilePhoneNumber field.

FormattedMobilePhoneNumber Field Options	Description
Rule Name	O_INT_SVC_FormattedMobileNumberValidation
Error Message	The mobile number has more than 40 characters, which is the maximum allowed.
Definition	<pre>def phones = Phone while (phones.hasNext()) { def phone = phones.next() if (phone?.PhoneType == 'MOBILE' && phone?.PhoneNumber != null && length(phone?.FormattedPhoneNumber) > 40) return false } return true</pre>

The following table lists required options for the FormattedFaxNumber field.

FormattedFaxNumber Field Options	Description
Rule Name	O_INT_SVC_FormattedFaxNumberValidation
Error Message	The fax has more than 40 characters, which is the maximum allowed.
Definition	<pre>def phones = Phone while (phones.hasNext()) { def phone = phones.next()</pre>

FormattedFaxNumber Field Options	Description
	<pre> if (phone?.PhoneType == 'FAX' && phone?.PhoneNumber != null && length(phone?.FormattedPhoneNumber) > 40) return false } return true </pre>

The following table lists required options for the FormattedHomePhoneNumber field.

FormattedHomePhoneNumber Field Options	Description
Rule Name	O_INT_SVC_FormattedHomePhoneNumberValidation
Error Message	The home phone has more than 40 characters, which is the maximum allowed.
Definition	<pre> def phones = Phone while (phones.hasNext()) { def phone = phones.next() if (phone?.PhoneType == 'HOME' && phone?.PhoneNumber != null && length(phone?.FormattedPhoneNumber) > 40) return false } return true </pre>

The following table lists required options for the PostalCode field.

PostalCode Field Options	Description
Rule Name	O_INT_SVC_PostalCodeValidation
Error Message	The postal code has more than 10 characters, which is the maximum allowed.
Definition	<pre> return (length(PrimaryAddressPostalCode) <= 10) </pre>

- When you have finished, click **Save and Close**.

9 Appendix E: Required Files

Overview of Required Files

The following table lists the files, descriptions, and other information required to perform the CX Sales to B2C Service integration.

File	Description	File Name	File Location
ICS Integration Package Archive.	The integration package that you import into Oracle Cloud Infrastructure.	OSC_SVC.par	ICS\OSC_SVC.par.
Account Bulk import postprocessing script.	Reference Implementation for the postprocessing of Account bulk import from CX Sales to B2C Service.	Account.sh	Scripts\Bulk_Loading\Account\OSC_SVC\Account.sh
Organization bulk import postprocessing script.	Reference implementation for the postprocessing of Organization bulk import from B2C Service to CX Sales.	Mapping.sh	Scripts\Bulk_Loading\Account\SVC_OSC\StateProvinceMapping.sh
Country With Province .CSV file.	A CSV file which shows Countries with Provinces. Used for the postprocessing of Organization and Contact Bulk loading from B2C Service to CX Sales.	CountryWithProvince.csv	Scripts\Bulk_Loading\Account\SVC_OSC\CountryWithProvince.csv
Contact Bulk loading postprocessing script.	Reference implementation for the postprocessing of Contact Bulk Loading from CX Sales to B2C Service.	Contact.sh	Scripts\Bulk_Loading>Contact\OSC_SVC>Contact.sh
Prepare Contact Source Reference script.	Reference implementation to prepare Contact Source Reference file ready for import.	prepareContactSourceReference.sh	Scripts\Bulk_Loading>Contact\OSC_SVC\prepareContactSourceReference.sh
Contact Bulk Loading State Province Mapping script.	Reference Implementation of State to Province Mapping as part of postprocessing of Contact Bulk import from B2C Service to CX Sales.	StateProvinceMapping.sh	Scripts\Bulk_Loading>Contact\SVC_OSC\StateProvinceMapping.sh
Contact Bulk Loading postprocessing script.	Reference implementation for the postprocessing of Contact Bulk Loading from B2C Service to CX Sales.	ContactSSR.sh	Scripts\Bulk_Loading>Contact\SVC_OSC\ContactSSR.sh

File	Description	File Name	File Location
Service Cloud Contact ID and External Reference Report Definition.	A report definition which is imported into B2C Service and used for exporting Contact IDs and their respective External References. Used during bulk loading of Contacts from CX Sales to B2C Service.	Contact_ID_ExtReference.xml	Scripts\Bulk_Loading\Reports\ \Contact_ID_ExtReference.xml
Country and Province(State) ID Report Definition.	A report definition which is imported into B2C Service and used for exporting CountryIDs and their respective Province(State) IDs. Used during bulk loading of Accounts and Contacts from CX Sales to B2C Service.	Country and Province (State) ID Report.xml	Scripts\Bulk_Loading\Reports\ Country and Province (State) ID Report.xml
Country ID Report Definition.	A report definition which is imported into B2C Service for exporting Country and their respective Country IDs. Used during bulk loading of Accounts and Contacts from CX Sales to B2C Service.	CountryIDMapping.xml	Scripts\Bulk_Loading\Reports\ CountryIDMapping.xml
Service Cloud Organization ID and External Reference Report Definition.	A report definition which is imported into B2C Service for exporting Organization IDs and their respective External References. Used during bulk loading of Accounts from CX Sales to B2C Service.	Organization_ID_ExtReference.xml	Scripts\Bulk_Loading\Reports\ Organization_ID_ExtReference.xml
Linux script to get Countries with Province.	A Linux script to create CountriesWith Province.csv file. Used to configure the CountryWithProvince ICS Lookup.	getCountriesWithProvince.sh	Scripts\ICS_Customization\Linux\ getCountriesWithProvince.sh
Windows script to get Countries with Province.	A Windows script to create the CountriesWith Province.csv file. Used to configure the CountryWithProvince ICS Lookup.	getCountriesWithProvince.ps1	Scripts\ICS_ Customization\Windows\ getCountriesWithProvince.ps1
Service Cloud Organization Export Reference Report Definition.	A report definition which is imported into B2C Service for exporting organization data to be imported into CX Sales during bulk loading.	Unsynced_Orgs_By_Create_ Date.xml	Scripts\Bulk_Loading\Reports\ \Unsynced_Orgs_By_Create_ Date.xml
Service Cloud Contact Export Reference Report Definition.	A report definition which is imported into B2C Service for exporting contact data to be imported into CX Sales during bulk loading.	Unsynced_Contacts_By_Create_ Date.xml	Scripts\Bulk_Loading\Reports\ \Unsynced_Contacts_By_Create_ Date.xml

10 Appendix F: Bulk Import

Overview of Bulk Import

Bulk import of Contact and Account data is optional depending on your implementation of either Oracle CX Sales and Oracle B2C Service:

- If you are new to both Oracle CX Sales and Oracle B2C Service, you do not need to perform the steps in this appendix.
- If you have an existing implementation of Oracle CX Sales (but not Oracle B2C Service), you must perform the steps shown in Perform a Bulk Export Then Import of Organizations from Oracle B2C Service to Oracle CX Sales.
- If you have an existing implementation of Oracle B2C Service (but not Oracle CX Sales), you must perform the steps shown in Perform a Bulk Import of Contact Records from Oracle CX Sales, and Perform Bulk Import of Account Records from Oracle CX Sales to Oracle B2C Service.
- If you have an existing implementation of both Oracle CX Sales and Oracle B2C Service, you must perform all steps in this chapter.

Overview of Bulk Import of Account Records from Oracle CX Sales to Oracle B2C Service

This topic presents a high-level overview of the bulk import of account records.

Note: If you must implement both Oracle CX Sales to Oracle B2C Service, and Oracle B2C Service to Oracle CX Sales bulk loads, then you must first perform the Oracle CX Sales to Oracle B2C Service bulk load operation. When you're performing the Oracle B2C Service to Oracle CX Sales bulk load, you must exclude all records that have the ExternalReference parameter set to null. Performing the bulk import of account records from Oracle CX Sales to Oracle B2C Service involves the following general steps:

1. Import the report definitions provided by Oracle B2C Service (Country and Province (State) ID Report.xml and Country ID Report.xml) into Oracle B2C Service and export the report generated as CSV files (StateldMapping.csv and CountryIdMapping.csv).
2. Export the data from Oracle CX Sales.
3. Combine the exported data from Oracle CX Sales using the RegistryID.
4. Map the respective Stateld and CountryId columns to the StateorProvince and Country columns based on the exported reports from Oracle B2C Service.
5. Create an import mapping in Oracle B2C Service to import exported data from Oracle CX Sales.
6. Import the final Organization.csv file into Oracle B2C Service using the import mapping you created.
7. Create a report in Oracle B2C Service that contains the imported Org ID value and respective External Reference value.
8. Export the report created in the first step, from Oracle B2C Service as a CSV file.

9. Create an import mapping in Oracle CX Sales (based on the SourceSystemReference object) to import the exported CSV file from Oracle B2C Service.
10. Import the report (containing Org ID and External Reference) from Oracle B2C Service into Oracle CX Sales.

Overview of Bulk Import of Contact Records from Oracle CX Sales to Oracle B2C Service

This topic presents a high-level overview of bulk import of contact records. Performing bulk import of contact records from Oracle CX Sales to Oracle B2C Service involves the following general steps:

Note: You must perform bulk import of account records prior to importing contact records.

1. Import the report definitions provided by Oracle B2C Service (Country and Province (State) ID Report.xml and Country ID Report.xml) into Oracle B2C Service, and export the report generated as .CSV files (StateIdMapping.csv and CountryIdMapping.csv).
2. Export data from Oracle CX Sales.
3. Combine the exported data from Oracle CX Sales using the RegistryID.
4. Map the respective StateId and CountryId columns to the StateorProvince and Country columns based on the exported reports from Oracle B2C Service.
5. Create an import mapping in Oracle B2C Service to import exported data from Oracle CX Sales.
6. Import the final Contact.csv file into Oracle B2C Service using the created import mapping.
7. Create a report in Oracle B2C Service which contains the imported Contact ID and respective External Reference.
8. Export the newly created report from Oracle B2C Service as a CSV file.
9. Create an import mapping in Oracle CX Sales (based on the SourceSystemReference object) to import the exported CSV file from Oracle B2C Service.
10. Import the report (containing Contact ID and External Reference) from Oracle B2C Service into Oracle CX Sales.

Overview of the Account and Contact Bulk Import Process

The process of bulk importing accounts and contacts data involves the following four main steps:

1. Exporting Country and State or Province Mapping Files from Oracle B2C Service.
2. Performing Bulk Import of Account Records from Oracle CX Sales to Oracle B2C Service.
3. Performing Bulk Import of Contact Records from Oracle CX Sales to Oracle B2C Service.
4. Performing Original System Record Import.

Export Country and State or Province Export Country and State or Province Mapping Files from Oracle B2C Service

To export county and state or province mapping files from Oracle B2C Service to Oracle CX Sales, perform the following tasks in order.

Checking Privileges

You must first ensure that you have the correct privileges in the Oracle B2C Service client to create and export reports.

1. In Oracle B2C Service, navigate to Configuration, Staff Management, and then **Profiles**.
2. Double-click the profile records to open for edit, and then select **Permissions**.
3. Make sure the profile has the **Business Process Setting** check box enabled.
4. Select Analytics, and make sure the following check boxes are enabled: **Create/Edit Reports**, **Customize Reports**, and **Create/Edit Public Reports**.

Creating and Exporting Reports

You create and export reports using the report definition provided by Oracle B2C Service, and located in the OSC_SVC.zip file.

1. Sign in to Oracle B2C Service.
2. Navigate to Report Explorer, and click the New Report tab.
3. Click the Import Existing Report Definition link.
4. Select the report definition: County_StateProvince_IDMap.xml, then save the report.
5. Click the Home menu, and then select Report View
6. Click Export, and select delimited, comma, and from the Export Options dialog box, set the location, then click OK.
7. Repeat the previous steps for the following report: CountryIDMapping.xml.

Perform Bulk Import of Account Records from Oracle CX Sales to Oracle B2C Service

Use the following tasks to perform bulk export of account records from Oracle CX Sales, then bulk import of those account records to Oracle B2C Service.

Performing Bulk Export of Account Records from Oracle CX Sales

Use this task to perform bulk export of account records from Oracle CX Sales to Oracle B2C Service.

1. Sign in to Oracle CX Sales using administrator privileges.
2. Click **Setup and Maintenance**.
The Functional Setup Manager appears.
3. Click the Setup drop-down list, and select **Sales**.
4. In the Search Tasks field, enter: **Manage File Export Activities**, and then click the task link in the results list.
5. Click the **Create** button to create a new file export.
6. In the **Edit Export Process Definition** page, enter the required information listed in the following table.
The following table lists required fields to create a new file export.

Field	Value
Name	The name of the file export template.
Parent Object	Account.
File Name	The name of the file to be exported.

7. Click Next, then in the **Edit Export Process Definition** area, locate **Account Profile** in the list and disable (deselect) each box except **Account Address**.
8. Select **Edit Filter Criteria**, then in the dialog box, click **AFTER** from the **LastUpdateDate** list of values, and enter a date which includes all records that are not currently synchronized to Oracle B2C Service.
9. Select **Account Profile** in the **Export Objects** list, then in the Details area deselect each box except the following: **Organization Name**, and **PartyId**.
10. In the **Account Profile** area, expand **Account Address**.
11. Select **Edit Filter Criteria**, then in the dialog box, set the **OverallPrimaryFlag** value to **Y**.
12. Select **Account Address** in the **Export Objects** list, and in the Details area check each of the following (RegistryId and SiteNumber are selected by default):
 - o Country
 - o Address line 1
 - o Address line 2
 - o Address line 3
 - o Address line 4
 - o City
 - o PostalCode
 - o State
 - o Province
13. Click **Next**, and then in the **Create Schedule** view, choose the schedule type of **Immediate**.

14. Click **Next**, and then from the **Review** view, click **Activate**.
15. In the **Overview** page, click the **Refresh** button to view your status.
16. After the **Status** field has changed to **Succeeded**, locate the export file in the Exported data file column, and then click the zip file to view.

Performing Postprocessing of Account Bulk Import

For postprocessing of Account, you can use the Account.sh script, located in the Scripts/Bulk_Loading/Account/OSC_SVC/ folder, as a reference implementation.

Run the script as follows:

```
sh Account.sh Address.csv OrganizationProfile.csv CountryStateMapping.csv
```

1. Locate and open the Address.csv file.
2. Insert a new column before Address line 1 and name it as Street.
3. Merge the following columns: Address line 1, Address Line 2, Address Line 3, Address Line 4, and add the value to Street, similar to the following example.

The following table lists sample values from the four Address Line fields.

Address Line 1	Address Line 2	Address Line 3	Address Line 4
#24823	Alcoa Drive	Redmond	CA

The following table lists the merged Street value.

Street	NA
#24823, Alcoa Drive, Redmond, CA	NA

4. Delete the following columns: Address line 1, Address Line 2, address Line 3 and Address Line 4.
5. Insert a new column before State and name it StateorProvince.
6. Enter the value of the Province in the StateorProvince field if Province is not empty. If the Province value is empty, State value in the StateorProvince field using the example from the following table.

The following table lists sample values for the State and the Province fields.

State	Province
KA	Redmond
	BC
KA	BC

The following table lists the merged values in the State or Province field.

State or Province	Not applicable
KA	Not applicable
BC	Not applicable
BC	Not applicable

- Note the following table lists the maximum lengths of fields. If any of the fields displayed in the following table, taken as examples from the Address.csv file and the OrganizationProfile.csv file, exceed the length shown, they must be truncated.

The following table lists example field values from the Address.csv file and the OrganizationProfile.csv file.

Address.csv Fields	Maximum Length
Street	80
StateorProvince	255
City	80
Postal Code	10
Country	255

The following table lists the maximum length of the OrganizationName field.

OrganizationProfile.csv Fields	Maximum Length
OrganizationName	80

- Now, merge the Organization.csv file with the Address.csv file based on the common Registry ID column.
- After merging, open the OrganizationProfile.csv file, then do the following:

- a. Create a new column before the Country column called Country ID.
 - b. Use the CountryIDMapping.csv file exported from Oracle B2C Service by importing the Report Definition provided by Oracle B2C Service "CountryID Mapping.xml" to map the values in Country with their corresponding CountryId to Country ID column.
10. Map the StateorProvince column to Oracle B2C Service State ID, then do the following:
 - a. Create a new column before the StateorProvince column called State ID.
 - b. Use the StateIDMapping.csv file exported from Oracle B2C Service by importing the Report Definition provided by Oracle B2C Service (Country and Province (State) ID Report.xml) to map the values in Country with their corresponding StateId to State ID column.
11. Split the Organization.csv file into multiple files (Organization-1.csv, Organization-2.csv, Organization-3.csv, and so on) of the number of records exceed one million such that each split file has maximum number of records equal to or less than one million records.

Importing Accounts into Oracle B2C Service

Note: The Org_ID_ExtRef.csv file is the file that is exported during Account import from Oracle CX Sales to Oracle B2C Service.

1. In Oracle B2C Service, navigate to Configuration, Database, and then Data Import Templates.
2. In the Date Import Templates list, select Organization, and then click the New button.
3. In the Data Import Template - Edit form, enter a name for the template, and provide the names of the map columns in the CSV file to the Oracle B2C Service fields.
4. In the Duplicate Criteria field, enter the following: `ext_ref={PartyId} AND name={Organization Name}`
5. Save the template.

Importing the Merged CSV File

1. Navigate to Configuration, Database, and then Data Import Wizard.
2. From the Data Record Type drop-down list, choose Organization.
3. For the Data File, navigate to the merged Organization.csv file.
4. Select the newly created template, and make sure each column is mapped to the correct field, then click Next to initiate the scan.

All records are scanned.
5. Ensure all records are imported.

Creating an Organization ID External Reference Report

1. In Oracle B2C Service, click File, then select **Report**.
2. In the New Report screen, click the Import Existing Report Definition link.
3. Select the Organization_ID_ExtReference.xml report.
4. Save the report locally, then click the Home menu, then Views, and then **Report View**.
5. Click the **Export** button, then choose Delimited, and then Comma to export the report as a CSV file.

Importing Account External References into Oracle CX Sales

1. In Oracle CX Sales, click Setup and Maintenance.

2. Click the Setup drop-down list, and select **Sales**.
3. In the Search Tasks field, enter the following: **Manage File Import Activities**, then click the task link in the results list.
4. Click the Manage File Import Mappings link in the search results.
5. Create a new import map using the values from the following table.

The following table lists the field values required to create an import map.

Field	Value
Import Mapping	ORG_OSR_Import_Map
Object	Source System Reference

6. Click **Save and Close**.
7. In the Manage File Import Mappings screen, click the import mapping record.
8. Edit the mapping using the details from the following table.

The following table lists required additional information for your import map.

Sequence	Column Header	Object	Attribute
1	External ID	SourceSystemReference	OrigSystemReference
2	External Reference	SourceSystemReference	ExistingOwnerTableID
3	Owner Table Name	SourceSystemReference	OwnerTableName
4	Orig System	SourceSystemReference	OrigSystem

Importing the Original System Reference into Oracle CX Sales

Use this task to import the Original System Reference into Oracle CX Sales.

1. In Oracle CX Sales, click Setup and Maintenance.
2. Click the Setup drop-down list, and select **Sales**.
3. In the Search Tasks field, enter the following: **Manage File Import Activities**, then click the task link in the results list.
4. In the Manage Import Activities view, click **Create**.

- In the Create Import Activity: Enter Import Options view, enter the required information listed in the following table.

The following table lists required import options.

Field	Value
Name	ORG_OSR
Object	Source System Reference
File Type	Text File
Upload From	Desktop
File Name	The name of the CSV file you exported from Oracle B2C Service.
Data Type	Comma Separated
Import Mapping	ORG_OSR_Import_Map (this is the mapping you created previously).

- Click **Next**.
- In the Map Fields screen, select the previously created import mapping.

The following table lists the import mappings.

Column Header	Object	Attribute
External ID	SourceSystemReference	OrigSystemReference
External Reference	SourceSystemReference	ExistingOwnerTableID

- In the **Set Constant Values** area, specify the required information from the following table.

The following table lists the required constant values.

Object	Attribute	Value
SourceSystemReference	OwnerTableName	HZ_PARTIES
SourceSystemReference	OrigSystem	RNOW

Object	Attribute	Value

9. Click **Next**.
10. In the Create Schedule view, select Immediate and click **Next**.
11. In the Review and Activate view, review, then click **Activate**.
12. Wait until the status of the import activity changes from Scheduled to Completed, and once the status has changed, all records were successfully imported.
13. If the status changes to "completed with errors" this indicates that not all records were successfully imported. View errors by clicking the **completed with errors** link.

Perform Bulk Import of Contact Records from Oracle CX Sales

Perform the following tasks in the order displayed.

First you perform a bulk import of contact records from Oracle CX Sales.

Note: You must perform bulk import of account records prior to importing contact records.

1. In Oracle CX Sales, click **Setup and Maintenance**, and search for the **Manage File Export Activities** task.
2. In the search results, click the task link.
3. In the Overview page, click the **Create** icon to create a new file export.
4. In the **Edit Export Process Definition** page, enter the following required information.

The following table lists the fields and values required to create a new file export definition.

Field	Value
Name	The name of the file export template.
Parent Object	Contact
File Name	The name of the file to be exported.

5. Click **Next**.
6. In the **Edit Export Process Definition** view, locate **Contact Profile** in the list and disable (deselect) each box except the following:
 - o Contact Address

- o Contact Email
- o Contact Fax
- o Contact Mobile
- o Contact Phone

7. Enable the required Attribute Name, and set the view criteria for each object using the following table.

The following table lists the required information to create the Contact Profile export definition.

Export Objects	Attribute Name	View Criteria
Contact Profile	PartyId, PersonFirstName, PersonLastName, PartyNumber, PrimaryCustomerId	LastUpdateDate AFTER date which includes all records that are not currently synchronized to Oracle B2C Service.
Contact Address	PartyId, Country, Address1, Address2, Address3, Address4, City, Postal Code, State, Province, PartySiteNumber, PartyNumber	Set the OverallPrimaryFlag to Y
Contact Email	PartyId, EmailAddress, PartyNumber	Set the OverallPrimaryFlag to Y
Contact Fax	PhoneNumber, PhoneExtension, PhoneAreaCode, PhoneCountryCode, PartyNumber, PartyId, CreationDate	LastUpdateDate AFTER date which includes all records that are not currently synchronized to Oracle B2C Service.
Contact Mobile	PhoneNumber, PhoneExtension, PhoneAreaCode, PhoneCountryCode, PartyNumber, PartyId, CreationDate	LastUpdateDate AFTER date which includes all records that are not currently synchronized to Oracle B2C Service.
Contact Phone	ContactPointPurpose, OverallPrimaryFlag, PhoneNumber, PhoneExtension, PhoneAreaCode, PhoneCountryCode, PartyNumber, PartyId, CreationDate	LastUpdateDate AFTER date which includes all records that are not currently synchronized to Oracle B2C Service.

8. Activate the export process.
9. In the History view, click the link in the Exported data file area.
10. Decompress and locally save the archive.

Performing Postprocessing of Contact Bulk Import

For postprocessing tasks, you can use an included script as reference. The script name is: Contact.sh and you run it as follows:

```
sh Contact.sh Address.csv Phone.csv Mobile.csv Fax.csv Email.csv PersonProfile.csv CountryStateMapping.csv Org_ID_ExtRef.csv
```

To manually process, use the following tasks.

Adding and Populating the Street Column

1. Locate and open the Address.csv file.
2. Insert a new column before AddressLine1 and name it Street.
3. Merge the following columns: AddressLine1, AddressLine 2, AddressLine3, AddressLine4, and add the value to Street, similar to the following example.

The following table lists four address line column values from the Address.csv file.

AddressLine1	AddressLine2	AddressLine3	AddressLine4
123 Main St	Suite 303	3rd Floor	Building #2

After the merge the Street column has the merged values displayed in the following table.

Street	Not applicable
123 Main St, Suite 303, 3rd Floor, Building #2	Not applicable

4. Delete the following columns: AddressLine1, AddressLine 2, AddressLine3, AddressLine4

Adding and Populating a StateorProvince Column

1. In the Address.csv file, insert a new column before State and name it StateorProvince.
2. Populate the StateorProvince column by merging State and Province fields similar to the following example.

The following table lists the State and the Province values from the Address.csv file.

State	Province
KA	Redmond
Not applicable	BC
KA	BC

State	Province

After the merge the StateorProvince column has the merged values displayed in the following table.

S. No	StateorProvince
1.	KA
2.	BC
3.	BC

Adding and Populating a Fax Column

1. Open the Fax.csv file.
2. Insert a new column before the Registry ID column and call it Fax.
3. Populate the Fax field value by merging the following fields: Phone Country Code, Area Code, Phone, and Extension similar to the following example.

The following table lists the values from the Fax.csv file.

Phone	Extension	Area Code	Phone Country Code
23	4345	12	1

After the merge the Fax column has the merged values displayed in the following table.

Fax	Not applicable
+1 (12) 23 x4345	Not applicable

4. Delete the Phone Country Code, Area Code, Phone and Extension columns.

Adding and Populating a Mobile Column

1. Open the Mobile.csv file.
2. Insert a new column before the Registry ID column and call it Mobile.

- Populate the Mobile field value by merging the following fields: Phone Country Code, Area Code, Phone, and Extension similar to the following example.

The following table lists the values from the Mobile.csv file.

Phone	Extension	Area Code	Phone Country Code
23-3456	2345	123	1

After the merge the Mobile column has the merged values displayed in the following table.

Mobile	NA
+1 (123) 234-3456 x2345	NA

- Delete the Phone Country Code, Area Code, Phone and Extension columns.

Mapping the OrganizationId Column to the PersonProfile.csv File

- Open the PersonProfile.csv file.
- Add an OrganizationId column.
- Populate OrganizationId based on the field OrganizationId from the Org_ID_ExtRef.csv file using the following example.

The following table lists the added OrganizationID and ExternalReference values to the PersonProfile.csv file.

Organization ID	ExternalReference
1687	300100051268389

The following table lists the added columns already present in the PersonProfile.csv file.

Registry ID	First Name	Last Name	PartyId	PrimaryCustomerId
CDRM_81437	Kristen	Patrick	300100051217620	300100051268389

After the merge the PersonProfile.csv files contains the columns displayed in the following table.

Registry ID	First Name	Last Name	PartyId	PrimaryCustomerId	OrganizationId
CDRM_81437	Kristen	Patrick	300100051217620	300100051268389	1687

Registry ID	First Name	Last Name	PartyId	PrimaryCustomerId	OrganizationId

Merging the PersonProfile, Address, Email, Fax, Phone, and Mobile Export Files

1. Open the PersonProfile.csv file.
2. Add the following columns:
 - o Country
 - o Street
 - o City
 - o Postal Code
 - o State/Province
 - o Work Phone
 - o Home
 - o Mobile
 - o Fax
 - o Email
3. Merge the PersonProfile with Address, Email, Fax, Phone and Mobile using the common Registry ID field.

If a given contact record has more than one Fax number, Mobile number, Work Phone number or Home Phone number, then merge only the record with the oldest creation date. The two newly created fields (Home and Work Phone) of PersonProfile.csv file are populated based on the Phone.csv file. For a record (in the Phone.csv file), enter the value of from the Phone column (in the Phone.csv file), or in the Home column if the ContactPointPurpose value is set to PERSONAL and the OverallPrimaryFlag is set to N. Otherwise, enter the value of Phone in Work Phone column.

4. Use the Phone.csv file to add the values from the Phone column to the Home column in the PersonProfile.csv file.
5. Add the Phone column values, from the Phone.csv file to the Home column in the PersonProfile.csv file if the following are true in the Phone.csv file. If Purpose=PERSONAL and Primary=N. If not, map the column values to the Work Phone column in the PersonProfile.csv file. Use the following table as an example.
6. The following table lists values from the PersonProfile.csv file.

Registry ID	First Name	Last Name	PartyId	PrimaryCustomerId	OrganizationId
CDRM_81437	Kristen	Patrick	300100051217620	300100051268389	1687

Registry ID	First Name	Last Name	PartyId	PrimaryCustomerId	OrganizationId

The following table lists the merged values in the PersonProfile.csv file.

Registry ID	Country	Street	City	Postal Code	State/Province	PartyId
CDRM_81437	US	2106 Green St. Apt 105	Cincinnati	45206	OH	300100051217620

The following table shows the merged values in the Email.csv file.

Registry ID	PartyId	E-Mail
CDRM_81437	300100051217620	kristen.patrick@futaba.com

The following table lists the merged values in the Phone.csv file.

Registry ID	PartyId	Purpose	Primary	City
CDRM_81437	300100051217620	Business	2106 Green St Apt 105	Cincinnati

The following table lists the merged values in the PersonProfile.csv file.

Field	Description
Registry ID	CDRM_81437
First Name	Kristin
Last Name	Patrick
PartyId	300100051217620
Country	US

Field	Description
Street	2106 Green St Apt 105
City	Cincinnati
Postal Code	45206
State/Province	OH
Work Phone	+1 (513) 961 x2532
Home	+1 (123) 234-3455
Mobile	+1 (123) 234-3456
Fax	+1 (123) 234-3457 x4345
E-Mail	kristen.patrick@futaba.com
PrimaryCustomerId	300100051268389
OrganizationId	1687

Add Columns to the PersonProfile File

Use these topics to add additional columns to the PersonProfile.csv file.

Adding a Country ID column to the PersonProfile.csv File

1. Open the PersonProfile.csv file.
2. Insert a new column after the Country column and call it Country ID.
3. Use the CountryIDMapping.csv file exported from Oracle B2C Service by importing the Report Definition provided by Oracle B2C Service CountryID Mapping.xml to map the values in the Country column with their corresponding CountryId to Country ID column. See the following example.

The following table lists sample entries for Country and Country ID column in the PersonProfile.csv file.

Country	Country ID
US	1
CA	2

Adding a State/Province Column to the PersonProfile.csv File

1. Open the PersonProfile.csv file.
2. Insert a new column after the Country column and call it State/Province ID.
3. Use the StateIDMapping.csv file exported from Oracle B2C Service by importing the Report Definition provided by Oracle B2C Service Country and Province (State) ID.xml to map the values in the Country column with the corresponding StateID to State ID column. See the following example.
The following table lists sample entries for State/Province and State/Province ID column in the StateIDMapping.csv file.

State/Province	State/Province ID
OH	41
NY	40

Truncating Fields

1. Open the PersonProfile.csv file.
2. If any of the fields in the file exceed the maximum length limit, truncate the field value to its maximum length.
The following table lists sample entries for State/Province and State/Province ID column in the PersonProfile.csv file.

Field	Maximum Length
First Name	80
Last Name	80
Street	240

Field	Maximum Length
State/Province	255
Postal Code	10
EmailAddress	80
Work Phone	40
Home Phone	40
Mobile	40
Fax	40

3. Save the file as Contact.csv.
4. Split the Contact.csv file into multiple files: Contact_1.csv, Contact_2.csv and so on.

Create an Import Template for Oracle B2C Service

The following is a one-time requirement.

1. Sign in to Oracle B2C Service.
2. Navigate to **Configuration, Database**, and then **Data Import Templates**.
3. From the **Data Import Templates** menu, select **Contact**, and then click the **New** tab to create a new template.
4. Provide a name for the template and in the **Column Mappings** area map the columns from the Contact.csv file to the Oracle B2C Service field.
5. The field names include the following:
 - o External Reference(ext_ref)
 - o First Name(first_name)
 - o Last Name(last_name)

- Country(country_id)
 - Street(street)
 - City(city)
 - Postal Code(postal_code)
 - State/province(prov_id)
 - Office Phone(ph_office)
 - Home Phone(ph_home)
 - Mobile Phone(ph_mobile)
 - Fax Phone(ph_fax)
 - Email Address(email)
 - Organization(org_id)
6. In the **Duplicate Criteria** field, enter the following:
- ```
ext_ref={PartyId} AND any_email={Email}
```
7. Save the template.

## Import Merged Files into Oracle B2C Service

### Importing Merged Files

1. Sign in to Oracle B2C Service.
2. Navigate to **Configuration, Database, and Data Import Wizard**.
3. Click the **Data Record Type** drop-down list, and choose **Contact**, and in the Data File area, select the final merged **Contact.csv** file.
4. Select the template you created, and ensure all columns are properly mapped, then click **Next**.
5. Click the **Ignore Errors** check box, then wait until all records have been imported.

### Creating a Report

Now you create a report which exports IDs and ExternalReference pairs for newly imported records. The integration package includes a reference script which you can use to add the CON\_ prefix as follows assuming you have saved the export file in Contact\_RNOW\_ID\_ExtRef.csv.

The script is as follows:

```
sh prepareContactSourceReference.sh Contact_RNOW_ID_ExtRef.csv
```

1. Sign in to Oracle B2C Service, click File, and then select **Report**.
2. Click the **Import Existing Report Definition** link.
3. Select the **Contact\_ID\_ExtReference.xml** report.
4. Save the report locally, and then click the Home menu, then Views, and then **Report View**.
5. Click the **Export** button, then choose **Delimited**, and then **Comma** to export the report as a CSV file. In the Report Options area make sure **Add report name to output** is not checked.

6. Run the `sh prepareContactSourceReference.sh Contact_RNOW_ID_ExtRef.csv` Script.

## Importing the Original System Reference

Now you import the original system reference using the following tasks:

1. In Oracle CX Sales, click **Setup and Maintenance**.
2. Click the Setup drop-down list, and select **Sales**.
3. In the Search Tasks field, enter the following: **Manage File Import Activities**, and then click the task link in the results list.
4. Create a new import activity using the following information, then click **Next**.

The following table lists the fields and values required to create a new import activity.

| Field          | Value                      |
|----------------|----------------------------|
| Name           | CON_OSR                    |
| Object         | Source System Reference    |
| File Type      | Text File                  |
| Upload From    | Desktop                    |
| File Name      | Contact_RNOW_ID_ExtRef.csv |
| Data Type      | Comma Separated            |
| Import Mapping | ORG_OSR_Import_Map         |

5. In the Map Fields view, in the Select Import Mapping area, select the import mapping you previously created during the account import step and all fields are automatically filled.
6. In the **Set Constant Values** area, specify the following information:

The following table lists the required information to create constant values for an import mapping.

| Object                | Attribute      | Value      |
|-----------------------|----------------|------------|
| SourceSystemReference | OwnerTableName | HZ_PARTIES |

| Object                | Attribute  | Value |
|-----------------------|------------|-------|
| SourceSystemReference | OrigSystem | RNOW  |

7. Click **Next**.
8. In the Schedule view, select **Immediate**, and then click **Next**.
9. In the **Review and Activate** view, click **Activate**.
10. Follow the status value until the job status changes from Scheduled to Completed.

## Perform a Bulk Export then Import of Organizations from Oracle B2C Service to Oracle CX Sales

The following topics provide a step-by-step description of how to extract organization and contact data from Oracle B2C Service and upload it to Oracle CX Sales. This requirement is explained with two sample scenarios.

When you are performing the initial set-up of an ongoing data synchronization between an existing Oracle CX Sales implementation and existing Oracle B2C Service applications, you must perform an initial synchronization of existing organizations and contacts between the two applications before enabling an on-going synchronization.

**Note:** If you are importing any contact data from Oracle B2C Service to Oracle CX Sales, you must first import all organization data (from Oracle B2C Service to Oracle CX Sales). This occurs because associations between organizations and contacts might exist. Importing organizations prior to contacts maintain the existing associations between the two.

There are several steps involved in exporting Organizations data from Oracle B2C Service and then importing the data into Oracle CX Sales, where Organizations become Sales Accounts. Here are the high-level steps:

1. Create a report in Oracle B2C Service to export organization data. Either create the report from scratch, or use an included script.
2. Run the report, export the data, and save it locally.
3. Transform the organization data exported in the previous step.
4. Upload or import the transformed data into Oracle CX Sales to create Sales Accounts.

## Create and Run a New Report in Oracle B2C Service

The first step to exporting data out of Oracle B2C Service is to create a report to display requisite data after applying the appropriate filters.

In the specific case of exporting organization data from Oracle B2C Service, you only export a selected number of attributes such as Organization ID, Organization Name, External Reference (also known as the Fusion Party Reference ID) and Address details of an organization. This requires you to create a new report to include just those required attributes.

**Note:** The integration package includes a reference report definition which can be imported into Oracle B2C Service (Unsynced\_Orgs\_By\_Create\_Date.xml) for this purpose. To use the script, see the task which follows. Alternatively you can use the following task to create the new report.

## Using a Script to Create a Report

1. In Oracle B2C Service, click **File**, and then **Report**.
2. Click the **Import Existing Report Definition** link.
3. Select the Unsynced\_Orgs\_By\_Create\_Data.xml file from the dialog box.
4. Make any required changes, then save the file.

## Creating a New Report

1. In Oracle B2C Service, click File, and then **Report**.
2. Click the **Standard Report** link.
3. In the **New Report Designer**, select **Organization** from the list of objects.
4. From the list of fields, select Organization ID, and Organization Name, and drag and drop them to the **Data** area.
5. Now, back in the Data Dictionary, click the Organization\_Addresses object and drag and drop it in the Data area.

A join is automatically created between the Organization object and the Organization\_Addresses object.

6. Optionally, filter your data by doing the following:
  - a. Click the **Sort** button on the ribbon.
  - b. In the **Sort** dialog box, select the primary sort attribute, and choose whether you want the sort order to be Ascending or Descending. You can set four sort variables.
  - c. Click **OK** when your sort variables are set.
  - d. Apply filter criteria by clicking the **Level Filter** icon.
  - e. In the **Add Filter** dialog box, use filters such as Date Created or Address Type to limit the amount of data returned. Note, only include Organizations the ExternalReference (orgs.ext\_ref) parameter is null, if you want only unsynchronized organizations to be exported.
  - f. You can also use expressions to enhance your filtering.
  - g. Click OK when finished.
7. Now save the report by clicking the Save icon adjacent to the File menu, and specify a name for the report.

## Running the Newly Created Report

You generate your required data by running the newly created report.

1. Locate the new report by name in the Navigation panel. If you do not see the newly created report in the Navigation panel, click the Settings (gear wheel) icon to add your report to the list of displayed reports. After opening the report, you have to option to change your filters.
2. After modifying your report filters, if necessary, click **Search**. A complete list of organizations matching your search criteria is displayed.
3. Click the **Export** button on the ribbon, and select **Delimited**, then **Comma** to export a CSV file to your local computer.
4. In the Export Options dialog box, specify where you want to save the file, then click **OK**.

## Perform Data File Postprocessing

The CSV data file that you have just created is not yet ready to be imported into Oracle CX Sales.

You must perform some postprocessing tasks to remove extraneous data and also to introduce some additional information. Note that the transformation of the exported CSV file can be done through any appropriate tool which enables you to manipulate a CSV file. One way to perform the transformation is through scripts. For postprocessing of organization data exported from Oracle B2C Service, you can use, as a reference implementation, the Account.sh script, located in the following folder:

Scripts/Bulk\_Loading/Account/SVC\_OSC/ folder

Run the script as follows:

For Linux: Convert the mode of the file to executable through the following command:

```
chmod 755 Account.sh
```

Then, execute the script by typing the following:

```
./Account.sh
```

For Window:

Execute the script by typing the following:

```
Account.sh
```

The script begins executing and prompts you to enter certain parameters which are listed in the following table. After supplying the parameters, the data is transformed and committed to the AccountUpdated.csv file.

The following table lists descriptions of the required parameters for executing for executing the Account.sh script.

| Parameter                      | Description                                                                                                                                                                                                  |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filename                       | File to be transformed. The file must be in the same folder.                                                                                                                                                 |
| Delimiter                      | Character used as a delimiter in the file to be transformed. Since comma is usually part of most data, Oracle recommends that a character other than comma or space be used as a delimiter (for example: ~). |
| ColumnIndex for State/Province | The index of StateorProvince column number in your file.                                                                                                                                                     |

**Note:** All the required files (the domain value map (DVM) and the file to be transformed) must be in the same folder as the script that is executed. The name of the DVM file must be CountryWithProvince.csv.

1. Open the CountryWithProvince.csv file.



**2. Ensure that the State and Country codes match the definitions in Oracle CX Sales.**

For example, if the Country column lists United States, you must change the values to US to match Oracle CX Sales. See the following tables for a sample representation of pretransformation and posttransformation values.

- Before Transformation: The Country column shows United States (US).
- After Transformation: The Country column shows US.

The Oracle CX Sales data model requires State and Province to be in different columns. For countries that support State, that data must be in State column, for others, the data must be in Province column. See the following tables for a sample representation of pretransformation and posttransformation values.

The following table lists the StateorProvince and Country values prior to transformation.

| StateorProvince | Country |
|-----------------|---------|
| CA              | US      |
| NE              | US      |
| SK              | CA      |
| QC              | CA      |

The following table lists the values after transformation.

| State | Province | Country |
|-------|----------|---------|
| CA    |          | US      |
| NE    |          | US      |
|       | SK       | CA      |
|       | QC       | CA      |

3. After verifying the file, save it.

## Import Postprocessed Organization Data into Oracle CX Sales

Importing data into Oracle CX Sales is a multistep process. You set up the mapping that will be used when the transformed data is imported. Generally, you do this step one at a time.

1. In Oracle CX Sales, click **Setup and Maintenance**.
2. Click the Setup drop-down list, and select **Sales**.
3. In the Search Tasks field, enter the following: **Manage File Import Mappings**, then click the task link in the results list.
4. On the Manage File Import Mappings page, click the **New** button to create a new mapping.
5. In the **Create Import Mapping** dialog box, enter the information from the following table.

The following table lists the information required to create your import mapping.

| Field          | Value           |
|----------------|-----------------|
| Import Mapping | Provide a name. |
| Object         | Account.        |
| File Type      | Text file.      |

6. Click **Save and Close**.
7. In the Manage File Import Mappings page, click the name of the newly created mapping link.
8. On the Edit Import Mapping page, click the Add + icon and enter the information from the following table.

The following table lists the information required to complete your import mapping.

| Column Header     | Object              | Attribute            |
|-------------------|---------------------|----------------------|
| Organization ID   | OrganizationProfile | PartyOrigSystemRefNo |
| Organization Name | OrganizationProfile | OrganizationName     |
| Street            | SellToAddress       | Address1             |
| City              | SellToAddress       | City                 |

| Column Header  | Object        | Attribute  |
|----------------|---------------|------------|
| State/Province | SellToAddress | State      |
| Postal Code    | SellToAddress | PostalCode |
| Country        | SellToAddress | Country    |

9. Click **Save and Close**.

The mapping is complete. You can reuse this task to insert new or update existing rows into the Account object in Oracle CX Sales. You can use this mapping repeatedly during the import process.

10. In the Search: Tasks area, enter Manage File Import Activities and click **Search**.
11. In the Search Results, select the task, then click the **Go to Task** icon.
12. In the Manage Import Activities page, click the **New** icon.
13. In the Manage File Import Objects wizard, enter the information from the following table.

The following table lists the information required to create your import activity.

| Name           | Value                                                            |
|----------------|------------------------------------------------------------------|
| Name           | Specify the name for the import activity.                        |
| Object         | Account.                                                         |
| Upload From    | Select the Desktop button.                                       |
| Import Mapping | Click the drop-down list, and select the newly created mappings. |

14. Click **Next**.

The Edit Import Activity: Map Fields page appears. This page displays the mapping of the attributes to the transformed data.

15. In the Set Constant Values area, enter the information from the following table.

The following table lists the constant values required to complete your import activity.

| Field     | Value               |
|-----------|---------------------|
| Object    | OrganizationProfile |
| Attribute | PartyOrigSystem     |

| Field | Value |
|-------|-------|
| Value | RNOW  |

16. Click **Next**, then in the Create Schedule page, choose Immediate from the Schedule drop-down list, then click Next.
17. In the Review and Activate page, confirm the accuracy of all the information, then click **Activate**.
18. In the Manage File Import Objects page, monitor the progress from Scheduled to Completed.
19. If the status indicates Completed with Errors, then one or more errors occurred during the import process.
20. View the log file by opening the attachment associated with the File Import object item. Refer to the appropriate log to see which data failed.
21. After the process completes, navigate to Sales, then choose Accounts and verify that accounts were created.

## Import Account PartyID Values into Oracle B2C Service

After you have verified that the Sales Accounts have been successfully created in Oracle CX Sales, the next step is to update the original Organization records (in Oracle B2C Service) with the PartyID that was assigned by Oracle CX Sales.

This finishes the process, and both applications (Oracle CX Sales and Oracle B2C Service) have a mapping of unique IDs assigned by both applications.

1. After your import task completes successfully, the unique IDs that were assigned by Oracle CX Sales to each Account are committed to a log file. To view the log file, do the following:
  - a. Navigate to the View Import Status.
  - b. Locate the attachment column, and click the attachment for the wanted import item.
2. In the Attachments column, click the appropriate CSV link, and download the file to your local computer.

The CSV file contains the unique IDs assigned by Oracle CX Sales to each Organization that was successfully created. The IDs appear in the ObjectKey column.

3. Sign in Oracle B2C Service (through the CX Console) and from the Navigation area, choose Configuration, Database, then Data Import Wizard.
4. In the Data Import wizard, enter the information listed in the following table.

The following table lists the required information for the Data Import wizard.

| Field            | Value                                                         |
|------------------|---------------------------------------------------------------|
| Data Record Type | Organization                                                  |
| Header Location  | Click the drop-down arrow and select First Line of Data File. |

5. Click Next, then confirm that all information in the Column in File column conforms to the data exported from Oracle CX Sales, then click Next.

6. In the Column Mappings area, remove all rows except for the following:
  - o ObjectKey
  - o Organization ID

Remove rows by selecting a row, then clicking the Remove icon.

7. Click Next, and view the prescan data file, then click Next.

The actual import is completed and the appropriate Organizations updated with the PartyID (referred to as the Fusion Party Reference ID) assigned by Oracle CX Sales. Ensure that the record counts are accurate and as expected.

## Overview of a Bulk Export then Import of Contacts from Oracle B2C Service to Oracle CX Sales

There are several steps involved in exporting organizations data from Oracle B2C Service and then importing the data into Oracle CX Sales, in which organizations become sales accounts.

**Note:** If you're importing any contact data from Oracle B2C Service to Oracle CX Sales, you must first import all organization data (from Oracle B2C Service to Oracle CX Sales), because associations between organizations and contacts might exist. Importing organizations prior to contacts maintains the existing associations between the two.

The following shows the high-level steps:

1. Create a report in Oracle B2C Service to export Contacts data.
2. Run the report, export the data, and save it locally.
3. Transform the contact data exported in the previous step.
4. Upload or import the transformed data into Oracle CX Sales to create contacts.

## Create a New Report in Oracle CX Sales

The first step in exporting data out of Oracle B2C Service is to create a report to display requisite data after applying the appropriate filters.

In the specific case of exporting contact data from Oracle B2C Service, you will only export a selected number of attributes such as the following details of a contact:

- Contact ID
- First Name
- Last Name
- Email Address
- Phone Numbers
- Address

The integration package includes a reference report definition which can be imported into Oracle B2C Service (Unsynced\_Contacts\_By\_Create\_Date.xml) for this purpose. Alternatively the report can be created from scratch using the following instructions.

## Using a Script to Create a Report

1. In Oracle B2C Service, click File, and then Report.
2. Click the Import Existing Report Definition link.
3. Select the Unsynced\_Contacts\_By\_Create\_Data.xml file from the dialog box.
4. Make any required changes, then save the file.

## Creating a Report

1. In Oracle B2C Service, click File, and then Report.
2. Click the Standard Report link.
3. In the New Report Designer, in the Data Dictionary area, select Contacts from the list of objects.
4. From the list of fields, select the following, and drag and drop the into the Data Area:
  - o Contact ID (a mandatory field)
  - o Organization ID (a mandatory field)
  - o First Name (a mandatory field)
  - o Last Name (a mandatory field)
  - o Street
  - o City
  - o State
  - o Postal Code
  - o Country
  - o Email Address
  - o Office Phone
  - o Mobile Phone
  - o Fax Phone
5. Optionally filter your data by doing the following:
  - a. Click the Sort button on the ribbon.
  - b. In the Sort dialog box, select the primary sort attribute, such as Last Name, and choose whether you want the sort order to be Ascending or Descending. There are four sort variables you can set.
  - c. Click OK when your sort variables are set.
  - d. Apply filter criteria by clicking the Level Filter icon.
  - e. In the Add Filter dialog box, use filters such as Date Created or Address Type to limit the amount of data returned. Note, it is recommended you filter only contacts for which the ExternalReference parameter is null.
  - f. You can also use expressions to enhance your filtering.
  - g. Click OK when finished.
6. Now save the report by clicking the Save icon, and specifying a name for the report.

## Running the Newly Created Report

You generate your required data by running the newly created report.

1. Locate the newly created report by name in the Navigation panel. If you do not see the report in the Navigation panel, click the Settings (gear wheel) icon to add your new report to the list of displayed reports. After opening the report, you have to option to change your filters.
2. After modifying your report filters, if necessary, click Search. A complete list of contacts matching your search criteria is displayed.
3. Click the Export button on the ribbon, and select Delimited, then Comma to export a CSV file to your local computer. If there are more than 1 million records, you must perform multiple exports.
4. In the Export Options dialog box, uncheck the Add report name to the output checkbox, then specify where you want to save the file, and then click OK.

## Perform Postprocessing of the Contacts Data File

The CSV data file that you have just created is not yet ready to be imported into Oracle CX Sales.

You must perform some postprocessing tasks to remove extraneous data and also to introduce some additional information. Note that the transformation of the exported CSV file can be done through any appropriate tool which will allow you to manipulate a CSV file. One way to transform the CSV file is through scripts. In this task you perform two transformations on the Contacts data, shown in the following task:

- Split the StateorProvince column to make it compatible with the Country Code in Oracle CX Sales.
- Add the CON\_ prefix to the ContactID values

For transforming the contact data exported from Oracle B2C Service, use as reference implementation, the Contact.sh script, located in the following folder:

```
Scripts/Bulk_Loading/Contact/SVC_OSC/
```

Run the script as follows:

For Linux:

Convert the mode of the file to executable through the following command:

```
chmod 755 Contact.sh
```

Then execute the script by entering the following:

```
./Contact.sh
```

For Windows:

Execute the script by entering the following:

```
Contact.sh
```

The script begins executing and prompts you to enter certain parameters which are listed in the following table. After supplying the parameters, the data is transformed and committed to the ContactUpdated.csv file.

The following table describes the parameters required by the Contact.sh script.

| Parameter                      | Description                                                                                                                                                                                                  |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filename                       | File to be transformed. The file must be in the same folder.                                                                                                                                                 |
| Delimiter                      | Character used as a delimiter in the file to be transformed. Since comma is usually part of most data, it is recommended that a character other than comma or space be used as a delimiter (for example: ~). |
| ColumnIndex for Contact        | The index of ContactID column in your file. The first column is 1.                                                                                                                                           |
| Direction                      | SvcToOsc.                                                                                                                                                                                                    |
| ColumnIndex for State/Province | The index of StateorProvince column numbers in your file.                                                                                                                                                    |

**Note:** All the required files (the domain value map (DVM) and the file to be transformed) must be in the same folder as the script that is executed. The name of the DVM file must be CountryWithProvince.csv.

## Performing Postprocessing of the Data File

1. Open the CountryWithProvince.csv file.
2. Ensure that the State and Country codes match the definitions in Oracle CX Sales.

For example, if the Country column lists United States, you must change the values to US to match Oracle CX Sales. See the following tables for a sample representation of pre-transformation and post-transformation values.

- o Before Transformation: The Country column shows United States (US)
- o After Transformation: The Country column shows US.

The Oracle CX Sales data model requires State and Province to be in different columns. For countries that support State, that data must be in State column, for others, the data must be in Province column. See the following tables for a sample representation of pretransformation and posttransformation values.

The following table lists the pretransformation values.

| StateorProvince | Country |
|-----------------|---------|
| CA              | US      |
| NE              | US      |
| SK              | CA      |



| StateorProvince | Country |
|-----------------|---------|
| QC              | CA      |

The following table lists the posttransformation values.

| State          | Province       | Country |
|----------------|----------------|---------|
| CA             | Not applicable | US      |
| NE             | Not applicable | US      |
| Not applicable | SK             | CA      |
| Not applicable | QC             | CA      |

3. Use shell scripting or a text editor to apply a prefix to the Contact ID values that were exported out of Oracle B2C Service. The required prefix is CON\_. Thus a contact ID of 1036 will appear as CON\_1036 as shown here:
  - o Before Transformation: The Contact ID values is 1036
  - o After Transformation: The Contact ID value is CON\_1036.
4. After verifying the file, save it.

## Import Processed Contacts Data into Oracle CX Sales

Importing data into Oracle CX Sales is a multistep process. In this step you set up the mapping that will be used when the transformed data is imported. Generally, you do this step one time.

1. In Oracle CX Sales, click Setup and Maintenance.
2. Click the Setup drop-down list, and select Sales.
3. In the Search Tasks field, enter the following: **Manage File Import Mappings**, then click the task link in the results list.
4. On the Manage File Import Mappings page, click the New button to create a new mapping.

5. In the Create Import Mapping dialog box, provide the information from the following table.

The following table lists field values for creating an import mapping.

| Field          | Value           |
|----------------|-----------------|
| Import Mapping | Provide a name. |
| Object         | Contact         |

6. Click Save and Close.
7. In the Manage File Import Mappings page, click the name of the newly created mapping link.
8. On the Edit Import Mapping page, click the Add (+) icon and provide information from the following table.

The following table lists required additional information to create an import mapping.

| Column Header   | Object              | Attribute            |
|-----------------|---------------------|----------------------|
| Contact ID      | PersonProfile       | PartyOrigSystemRefNo |
| Organization ID | ContactRelationship | ObjOrigSystemRefNo   |
| First Name      | PersonProfile       | PersonFirstName      |
| Last Name       | PersonProfile       | PersonLastName       |
| Street          | Address             | Address1             |
| City            | Address             | City                 |
| State           | Address             | State                |
| Province        | SellToAddress       | Province             |
| Postal Code     | Address             | PostalCode           |
| Country         | Address             | Country              |
| Email Address   | Email               | EmailAddress         |

| Column Header | Object | Attribute      |
|---------------|--------|----------------|
| Phone         | Phone  | RawPhoneNumber |

9. Click **Save and Close**.  
The mapping is complete. You can reuse this task to insert new or update existing rows into the Account object in Oracle CX Sales. You can use this mapping repeatedly during the actual import process.
10. In the Search: Tasks area, enter Manage File Import Activities and click **Search**.
11. In the Search Results, select the task, then click the **Go to Task** icon.
12. In the Manage Import Activities page, click the **New** icon.
13. In the Manage File Import Objects wizard, specify the information from the following table.

The following table lists information required to create an import activity.

| Name           | Value                                                            |
|----------------|------------------------------------------------------------------|
| Name           | Specify the name for the import activity.                        |
| Object         | Contact                                                          |
| Upload From    | Select the Desktop button.                                       |
| Import Mapping | Click the drop-down list, and select the newly created CSV file. |

14. Click **Next**.  
The Edit Import Activity: Map Fields page appears. This page displays the mapping of the attributes to the transformed data.
15. In the Set Constant Values area, specify the information from the following table.  
The following table lists information required to set constant values for an import activity.

| Field               | Value           | Value |
|---------------------|-----------------|-------|
| ContactRelationship | ObjOrigSystem   | RNOW  |
| PersonProfile       | PartyOrigSystem | RNOW  |

16. Click **Next**, then in the Create Schedule page, choose **Immediate** from the Schedule drop-down list, then click **Next**.
17. In the Review and Activate page, confirm the accuracy of all the information, then click **Activate**.
18. In the Manage File Import Objects page, monitor the progress from Scheduled to Completed.
19. If the status indicates Completed with Errors, then one or more errors occurred during the import process.

20. Refer to the appropriate log to see which data failed. View the log file by opening the attachment associated with the File Import object item.
21. After the process completes, navigate to Sales, then choose Contacts and verify that Contacts were successfully created and associated with the correct Organization (if necessary).

## Import Contact PartyID Values into Oracle B2C Service

After you have verified that the Contacts have been successfully created in Oracle CX Sales, the next step is to update the original Contact records (in Oracle B2C Service) with the PartyID that was assigned by Oracle CX Sales.

This finishes the process, and both applications(Oracle CX Sales and Oracle B2C Service) have a mapping of unique IDs assigned by both applications.

In this task you perform one transformation on the contacts data, shown in the following task. You perform this task to remove the CON\_prefix from the ContactID value.

You can use as a reference implementation, the Contact.sh script, located in the following folder:

Scripts/Bulk\_Loading/Contact/SVC\_OSC/ folder

Run the script as follows:

For Linux:

Convert the mode of the file to executable through the following command:

```
chmod 755 Contact.sh
```

Then execute the script by typing the following:

```
./Contact.sh
```

For Windows:

Execute the script by entering the following:

```
Contact.sh
```

The script begins executing and prompts you to enter certain parameters which are listed in the following table. After supplying the parameters, the data is transformed and committed to the ContactUpdated.csv file.

The following table lists the required parameter values for the Contact.sh script.

| Parameter               | Description                                                                                                                                                                                                  |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filename                | File to be transformed. The file must be in the same folder.                                                                                                                                                 |
| Delimiter               | Character used as a delimiter in the file to be transformed. Since comma is usually part of most data, Oracle recommends that a character other than comma or space be used as a delimiter (for example: ~). |
| ColumnIndex for Contact | The index of ContactID column in your file. The first column is 1.                                                                                                                                           |
| Direction               | Oracle CX Sales to Oracle B2C Service.                                                                                                                                                                       |

| Parameter | Description |
|-----------|-------------|
|           |             |

## Importing Contact PartyID Values into Oracle B2C Service

1. View unique IDs in Oracle CX Sales for each Contact imported by navigating to the View Import Status page.
2. In the Attachments column, click the appropriate CSV link, and download the file to your local computer.

The CSV file contains the unique IDs assigned by Oracle CX Sales to each Contact that was successfully created. The IDs appear in the ObjectKey column.

3. Perform one final data transformation. In the Contact ID column, you must now remove the CON\_ prefix.

For example, what appears as CON\_1036 must be transformed to1036. Use either shell scripting or a text editor to do this transformation. See the following example:

Before transformation the Contact ID value is 1036.

After transformation the Contact ID value is CON\_1036.

4. Once finished with the transformation, sign in to Oracle B2C Service (through the CX Console) and from the Navigation area, choose Configuration, Database, then Data Import Wizard.
5. In the Data Import Wizard, enter the information listed in the following table.

The following table lists values for the fields required for the import.

| Field             | Value                                                              |
|-------------------|--------------------------------------------------------------------|
| Data Record Type  | Contact                                                            |
| Header Location   | Click the drop-down list arrow and select First Line of Data File. |
| Duplicate Records | Update Existing Data                                               |

6. Click Next, then confirm that all information in the Column in File column conforms to the data exported from Oracle CX Sales, then click Next.
7. In the Column Mappings area, remove all rows except for the following:
  - o ObjectKey
  - o Contact ID

Remove rows by selecting a row, then clicking the Remove icon.

8. Click Next, and view the pre-scan data file, then click Next.

The import is completed and the appropriate Organizations updated with the PartyID (referred to as the Fusion Party Reference ID) assigned by Oracle CX Sales. Ensure that the record counts are accurate and as expected.

