

Best Practices for Quick Deployment of Import and Export Management

Oracle ACX Sales and B2B Service

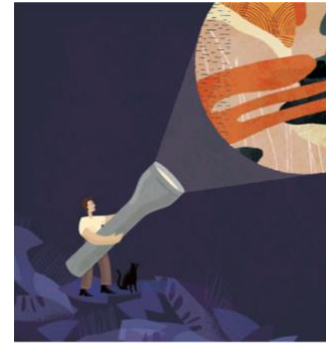
Import and Export Management is the latest, modern framework for moving data into and out of your CX Sales application. While importing data is often done during the initial implementation of your CX Sales application, with data brought over from legacy systems, it may also be used to update existing data or be part of synchronizing data across multiple systems.

In the following sections, we provide essential best practices and deployment guidance for Import and Export Management, using a simple checklist approach to keep things organized.

- Import Management
- Export Management

This is not a stand-alone document, but a complement to other essential resources. Therefore, you will need to review the linked resources, and follow their direction where applicable.

For additional assistance, where applicable, consult with your Oracle Implementation Partner.



Target audience

- Business Administrator
- Application Administrator
- Business Manager
- Project Manager
- Implementer

More kit components

- [Video](#)
- [Do you know about Import and Export Management?](#)

Quick link to resources

- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Center](#)
- [My Oracle Support \(MOS\)](#)
- [Oracle Help Center](#)

Other Helpful Links

- [System Requirements](#)
- [Oracle University](#)
- [Oracle Partner Finder](#)

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Import Management

- Use an appropriate **role** to execute Import Management processes, for example, the Sales Administrator or Application Implementation Consultant role. Your roles will further define which specific objects you will be able to Import.
- You will be using simple flat file structures (CSV), one file per data object, and ZIP files are only used for importing attachments. This simplifies some earlier import processes.
- Use the **templates**, which can be downloaded from Import Management, as the starting point for your import files. This will save you time and help avoid common mistakes.
 - Take advantage of the Automatic Mapping option. The templates will give you the correct column headings used by Automatic Mapping.
- Import Parent objects before their Child objects. For example, Account before Contact, Contact before Contact Point etc.
 - Use the Import Object Details screen to review parent/child relationships between objects.
 - Only** if an object isn't listed in Import Management, review if it is available in File-Based Data Import.
Note: There are very few of these cases – none by Update 20C.
- Use Application Composer to **Generate** Import and Export Artifacts for Custom Objects and Custom Fields, before using them in Import Management.
- Ensure the processing of one row in your input file(s) is not dependent on another row of your file.
For example, never include a row to create a record followed by rows to update specific fields of that same record, as rows of your input file(s) are not necessarily processed in row order.
- Use the **Validate Data** option to have the first 10 rows of your import file validated before executing the full import. Correcting any errors from this validation will save you time and help maintain your data quality.
- Use **Import Mode** (Create, Update and Create, Delete) to control how your input file will be handled. Use this option when you know what type of processing is expected, based on your files. This will focus the scope of import processing, making it more efficient, and simplify the diagnosis of any import errors.
- Import processes can be **automated** using REST APIs, but this should be used carefully.
 - Validate processes manually **before** automating.
 - Only automate processes that will be executed frequently over a long period (daily, weekly, monthly etc.). Do not automate ad hoc or volatile processes that are subject to frequent change.
- When using the High-Volume option, to handle several million records at a time, custom logic defined with Application Composer will not be applied. Therefore, you must confirm that your custom logic is not applicable or handle it separately.

Export Management

Exporting data is often necessary too and should be done using Export Management to take advantage the very similar, intuitive UI to Import Management.

- You will need an appropriate **role** to execute Export Management processes, for example, the Sales Administrator or Application Implementation Consultant role. Your roles will further define which specific objects you be able to Export.
- Use Export Management for **round-trip** export-import, where data is exported from CX Sales, updated in flat files, and then imported to apply updates to CX Sales.

- Separate the individual CSV files of an exported ZIP file before using as part of a subsequent import process. This is because Export Management produces a ZIP file, and Import Management uses simple CSV files.
- Use Application Composer to **Generate** Import and Export Artifacts for Custom Objects and Custom Fields, before using them in Export Management.
- Export processes can be **automated** using REST APIs, but this should be used carefully.
 - Validate processes manually **before** automating.
 - Only automate processes that will be executed frequently over a long period (daily, weekly, monthly etc.). Do not automate ad hoc or volatile processes that are subject to frequent change.

Technical Assistance

Please contact [Oracle Support](#) if you require technical assistance.

Resources

- [Understanding Import and Export Management for CX Sales and B2B Service](#) on Help Center
- [File Import and Export Resource Center](#) on My Oracle Support
- [External Data Loader Client](#) on My Oracle Support
- [Import REST APIs](#) – section of the REST API for CX Sales and B2B Service document on Help Center
- [Export REST APIs](#) – section of the REST API for CX Sales and B2B Service document on Help Center

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