

(22B) Oracle CX Sales and Oracle B2B Service: Import and Export

Oracle CX Sales and B2B Service

DURATION

2 Days

MODULES

7 Lectures

COURSE CODE

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Course Overview

This Oracle Sales Cloud Import/Export training course teaches you how to import and export data. You can manually enter small amounts of data through the UI but to import larger amounts of data you need to use the bulk data management utilities.

What You Will Learn

- 1 Course Introduction
- Learning Objectives
- Instructor and Class Participants
- Course Audience
- Course Prerequisites
- Course Goal
- Course Objectives
- Course Methodology
- Course Materials
- Resources
- Course Agenda
- 2 Import and Export Overview
- Learning Objectives
- Data Management
- Data Import Techniques
- Quick Import Macros
- Use Quick Import Macros
- Import Management
- External Data Loader Client (EDLC)
- Web Services Import
- File and Record Limits
- Preparing to Import Data
- Understanding the Data to be Imported
- Identifying Records
- Preparing the Source Data

- Bulk Data Management
- Data Export
- Recommended Practices
- Lesson Highlights
- 3 Quick Import Macros
- Learning Objectives
- Quick Import Macros
- Prerequisites
- iii
- Using the Import Macros
- 1. Get Data From the Application
- 2. (Optional) Add Attributes For Import
- 3. Add Your Data
- 4. Run the Import Macro
- 5. Monitor the Import Activity
- 6. Troubleshooting
- 7. Verify the Imported Data
- Lesson Highlights
- Practice
- 4 Import Management Mappings
- Learning Objectives
- Terminology
- Predefined Templates
- Download a Template
- Modify a Source File
- Automatic Mapping
- Runtime Mappings
- Create a Mapping From a Source File
- Lesson Highlights
- Practice
- 5 Import Management
- Learning Objectives
- Import Management
- Use Import Management
- 1. Download the Object Template(s)
- 2. Configure and Populate the Template(s)
- 3. Set Basic Import Options
- 4. (Optional) Set Advanced Options
- 5. Select or Create Mappings
- 6. Validate the Import Data
- 7. Run the Import Job
- 8. Monitor the Import
- 9. Verify the Imported Data
- Configure Data Retention
- Lesson Highlights
- Practice

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- 6 External Data Loader Client
- Learning Objectives
- External Data Loader Client (EDLC)
- Initial Setup (Optional)
- Save User Credentials
- Set Up a Configuration File
- Available EDLC Functionality
- Split Files
- Submit an Import
- List Recent Imports
- Get Log Files
- When to Use EDLC
- Lesson Highlights
- Practice
- 7 Export Management
- Learning Objectives
- Exporting Data
- Export Management
- Running Export Management
- 1. Create an Export Activity
- 2. Select the Mapping, Children, and Filters
- 2. Select the Mapping and Filters
- 3. Review and Submit the Process
- 4. Verify the Results
- Other Export Mechanisms
- Lesson Highlights
- Practice