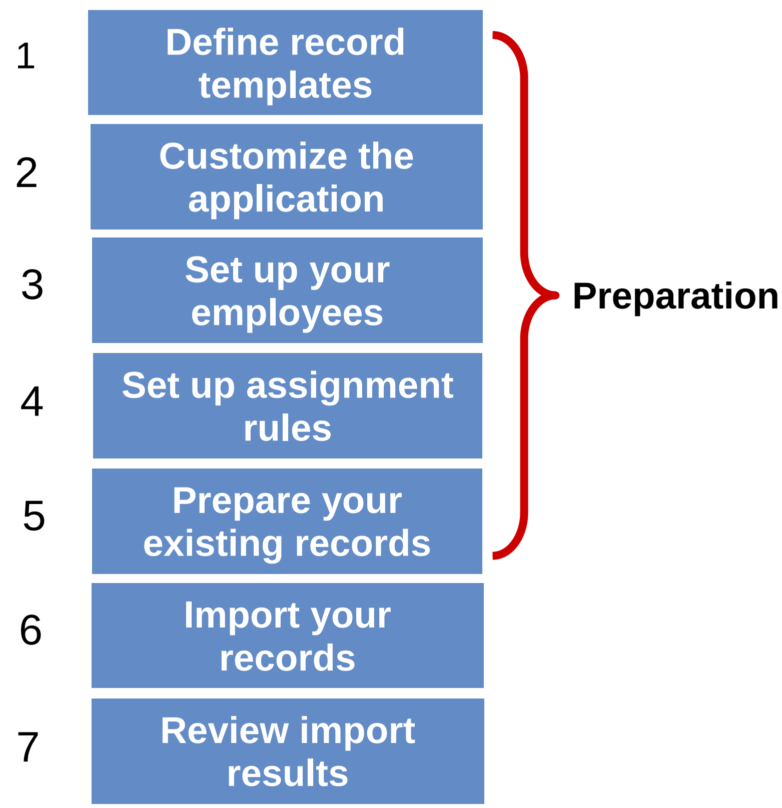
Before You Import Data

ORACLE CRM On Demand

The key to successfully importing your data is careful preparation. If you take the time to prepare, sending your data to the database is easy. If you do not prepare, some or all of your records might not be imported correctly.

The recommended process for preparing for and completing a data import in Oracle CRM On Demand is outlined below.

Importing Data into CRM On Demand



As you can see, preparation is the majority of the work. Once you have completed the preparation work, you can access an import assistant that will guide you through the steps you take to submit your import request to the database.

Preparation Step 1: Define Record Templates

Before you can do anything else, you need to think about what information each record of a particular type should include, so you can capture the data that your company needs. For example, a contact record will include a first and last name, an email address, a phone number, a cell phone number, a professional affiliation, and so on. You will probably want to involve others to help you define templates, which determine what fields each type of record contains.

Once you have defined your record templates, you can compare them to the fields that already exist in the application, to determine if you need to add fields, change any field display names, or change picklist values. You can use the **Custom Field Setup Template,** available in Online Help or via the Training and Support Center to help you do this. This document will help you plan for and keep track of any custom changes that you want to make to the application.

Preparation Step 2: Customize the Application

Next, you should use the Administration tools to make your customized changes to the record fields in the application. You have to create custom fields before you can import any data into those fields. Also, it is helpful to have any new picklist values defined before you start to import your data. Instructions for completing this task are available in the Application Customization topic in Online Help.

Preparation Step 3: Set Up Your Employees

When you import records, you usually want to assign them to the appropriate employee. You do this by including an Owner column in your import CSV file, and then filling in the employee's On Demand User ID for each record. In order to import the owner, your employees must already be set up in the application as users. You can import a list of your employees using the Users Import Assistant. Alternatively, you can manually set up your employees as users. Instructions for completing this task are available in the Setting Up Users topic in Online Help.

Preparation Step 4: Set Up Assignment Rules

You can set up assignment rules to automatically assign owners to Lead, Service Request, Account, and Opportunity records, based on your company's practices. If you want your imported records to be automatically assigned, you have to first set up and activate the assignment rules. Instructions for completing this task are available in the Defining Assignment Rules topic in Online Help.

Preparation Step 5: Prepare Your Existing Records

The final preparation step to take before you import your records is to prepare your company's existing records and save them in a CSV file format. This is not difficult to do, but you should take the time to carefully review your data before you import it. We recommend that you review the **Data Preparation and Clean Up Guide** available on the Tools and Templates page of the Training and Support Center. This document has many tips about how to avoid common mistakes when setting up your data.

Some basic things to consider are:

- Your import file must be in CSV format.
- Your import file must be no larger than 9 MB. If your file is too large, split it into multiple files that are each 9 MB or less and import each separately. Use the .map file generated from the first import to easily map the fields when you import the subsequent files.
- Your import file must have a column for every required field in the record. Records that do not contain valid values in the required field columns will not be imported.
- Values for picklist fields in the import file should exactly match the picklist values available in the application, including capitalization.
- Address fields do not accept line feeds (hard returns); to separate information in an address, use a comma.
- Make sure that the values for State/Province fields use the accepted two-character abbreviations.
- The valid Country field value for the United States is USA.
- Record Owner field columns must contain the User ID (sign in names) of valid CRM On Demand users at your company.
- If you have too many characters in a Description field for a record, excess characters will be imported into linked Note records.
- If there is a comma within a field value, for example, in a company name, the value must be enclosed in quotation marks in the CSV file. Open the file in Excel and resave it as a CSV file. This action automatically adds the quotation marks for you.
- Use this format for international phone numbers so that they display correctly:

  +country code, followed by a space, then the rest of the number in the usual format (for example, +44 7445 465 337)

  If using Excel, make sure that the format of the phone number cells is Text so the + does not trigger a calculation.

Test Your Import File: If you complete all of the preparation steps, you should have success when importing your records. However, it is always a good idea to test the import with a few records (three to five records), before you import your full file. Then, you can easily check each record to see if it imported as you expected, and correct or delete it if it did not. Testing can help you discover problems with your existing data before you perform a full import of all of your records.

