

Oracle® iStore

Implementation Guide

Release 11*i*

October 2001

Part No. A92133-01

ORACLE®

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

Restricted Rights Notice Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle Corporation disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark, and JInitiator, Oracle8i, Oracle9i, PL/SQL, and SQL*Plus are trademarks or registered trademarks of Oracle Corporation. Other names may be trademarks of their respective owners.

Contents

Send Us Your Comments	xix
Preface	xxi
Audience for This Guide	xxi
How To Use This Guide	xxi
Typographic Conventions	xxiii
Documentation Accessibility	xxiii
Other Information Sources	xxiv
Do Not Use Database Tools to Modify Oracle Applications Data	xxxii
About Oracle	xxxii
1 Introduction	
1.1 Oracle CRM E-Commerce Suite Overview	1-2
1.2 Oracle iStore 11 <i>i</i> Overview	1-3
1.2.1 Oracle iStore 11 <i>i</i> Features.....	1-3
1.3 New in this Release	1-4
1.4 Obsolete in this Release	1-5
2 Technology, Requirements, and Performance	
2.1 Architectural Overview	2-2
2.2 Minimum Software Requirements.....	2-3
2.3 Minimum Hardware Requirements	2-3

3 Dependency Requirements and Verification

3.1	Mandatory Dependencies	3-2
3.1.1	Dependency Setup Process Flow	3-4
3.1.2	Dependency Setup Checklist	3-4
3.1.3	Accessing Oracle Forms	3-6
3.1.4	Setting Up Languages and Currencies in AOL.....	3-6
3.1.5	Setting Up Sales Assistance Prompts in AOL	3-7
3.1.6	Setting Up Oracle General Ledger.....	3-8
3.1.7	Setting Up Oracle Human Resources	3-9
3.1.8	Setting Up Product Items in Oracle Inventory.....	3-12
3.1.9	Setting Up Oracle Inventory for Regular Available to Promise (ATP)	3-14
3.1.10	Setting Up Oracle Receivables.....	3-14
3.1.11	Setting Up Oracle Pricing.....	3-15
3.1.12	Setting Up Oracle Order Management	3-19
3.1.13	Setting Up Oracle Order Capture	3-21
3.1.14	Setting Profile Options for the Oracle iStore 11i Merchant UI	3-22
3.1.15	Setting Up Oracle CRM Technology Foundation.....	3-23
3.2	Conditional Dependencies	3-24
3.3	Installation and Dependency Verification	3-26

4 Implementation Overview

4.1	Process Overview	4-2
4.2	Implementation Task Sequence.....	4-7

5 Required Implementation Tasks

5.1	Setting Up Store Manager User Accounts	5-2
5.2	Setting Up the Concurrent Program Manager	5-3
5.2.1	Oracle iStore 11i Concurrent Programs	5-3
5.2.2	Setting Concurrent Program Manager Profile Options.....	5-6
5.2.3	Creating a Concurrent Program Manager	5-6
5.2.4	Scheduling Concurrent Programs.....	5-7
5.2.5	Checking Concurrent Program Status.....	5-9
5.3	Setting Up the Guest User Account	5-10
5.3.1	Creating the Guest User	5-10

5.3.2	Verifying the Guest User Account.....	5-11
5.4	Launching the Merchant UI.....	5-12
5.5	Creating Specialty Stores.....	5-13
5.5.1	Creating Global Specialty Stores.....	5-17
5.6	Creating the Hierarchy	5-21
5.6.1	Creating a Section in the Hierarchy.....	5-23
5.6.2	Modifying a Section in the Hierarchy	5-27
5.6.3	Adding Products to a Section.....	5-28
5.6.4	Adding Subsections to a Section.....	5-29
5.6.5	Moving Sections in the Hierarchy	5-31
5.7	Building the Product Catalog	5-32
5.7.1	Searching for Products	5-33
5.7.2	Modifying the Product Catalog	5-35
5.7.3	Publishing Products.....	5-38
5.8	Setting Up the Product Search.....	5-39
5.8.1	Setting Up Oracle Inventory for Product Search.....	5-40
5.8.2	Setting Search Profile Options.....	5-41
5.8.3	Populating the Category-Level Search Table.....	5-42
5.8.4	Populating the Section-Level Search Table	5-43
5.8.5	Changing Between Category-Level Search and Section-Level Search.....	5-44
5.8.6	Enabling Fuzzy Searches.....	5-46
5.8.7	Enabling Synonym Searches.....	5-46
5.8.8	Creating Search Index Tables	5-48
5.8.9	PL/SQL, Java, and JSPs Involved in Search.....	5-49
5.8.10	Customizing Search	5-51
5.8.11	Adding Stopwords to Searches	5-52
5.9	Setting Up Notifications	5-52
5.9.1	Message Configurations.....	5-54
5.9.2	Setting Up Notification Recipients	5-56
5.9.3	Adding Message Configurations	5-58
5.9.4	Modifying Message Configurations.....	5-59
5.9.5	Removing Message Configurations	5-61
5.9.6	Disabling Notification Events	5-62
5.10	Setting Up Storefront Reports	5-64
5.10.1	Understanding Storefront Reports Architecture	5-65

5.10.2	Setting Profile Options for Storefront Reports.....	5-66
5.10.3	Setting Up Conversion Rates for Storefront Reports	5-67
5.10.4	Preparing Data for Storefront Reports	5-68
5.10.5	Customizing Data Out Bin Drilldown Pages	5-74
5.10.6	Storefront Reports Lookup Types.....	5-75
5.11	Setting Up Oracle iStore 11 <i>i</i> Customer User Registration.....	5-76
5.11.1	Setting Up Customer Registration.....	5-77
5.11.2	Setting Default Customer Responsibilities.....	5-79
5.11.3	Roles and Permissions for Oracle iStore 11 <i>i</i> Users	5-80
5.11.4	Understanding B2B User Roles	5-85
5.11.5	Setting Default Customer Roles for B2B Users	5-88
5.12	Setting Profile Options for the Customer UI	5-89
5.12.1	Setting Oracle iStore 11 <i>i</i> (IBE) Profile Options for the Customer UI	5-89
5.12.2	Setting Oracle Order Capture (ASO) Profile Options.....	5-90
5.12.3	Setting Oracle Order Management (OM) Profile Options	5-90
5.12.4	Setting Multiple Organization (MO) Profile Options	5-91
5.12.5	Setting Site-Level Profile Options.....	5-91

6 Optional Implementation Tasks

6.1	Customizing Multimedia	6-2
6.1.1	Creating Media Source Files.....	6-2
6.1.2	Naming Multimedia	6-4
6.1.3	Cataloging Multimedia.....	6-5
6.2	Defining Multimedia Components.....	6-8
6.3	Customizing Templates.....	6-11
6.3.1	Creating Template Source Files.....	6-12
6.3.2	Naming Templates	6-16
6.3.3	Cataloging Templates	6-17
6.4	Defining Display Styles	6-21
6.5	Creating Product Relationships.....	6-23
6.5.1	Using Seeded Relationship Types.....	6-24
6.5.2	Creating Relationship Types.....	6-25
6.6	Customizing Product Presentation at the Category Level	6-27
6.7	Customizing Product Presentation at the Item Level	6-29
6.7.1	Creating Images for Products.....	6-29

6.7.2	Adding Item Descriptive Flexfields	6-30
6.8	Customizing the Shopping Cart.....	6-31
6.8.1	Customizing Shopping Cart Page Bin Content	6-32
6.8.2	Enabling Unit of Measure (UOM) Conversions	6-33
6.8.3	Allowing Decimal Quantities for Items	6-33
6.8.4	Specifying Flexfields At the Checkout Page	6-34
6.9	Creating B2B User Roles.....	6-36
6.10	Managing the Cache	6-36
6.10.1	Purging the Entire Cache	6-37
6.10.2	Purging the Section Cache	6-38
6.10.3	Purging the Product Cache.....	6-39

7 Verifying the Implementation

7.1	Oracle iStore 11i Implementation Verification Tasks.....	7-2
7.1.1	Testing the Store.....	7-2
7.1.2	Previewing Products and Sections	7-2

8 Diagnostics and Troubleshooting

8.1	Setting Up User-Level Logging.....	8-2
8.2	Receiving Diagnostic Messages.....	8-2
8.3	Java Applet Warning Workaround	8-3
8.4	Error ORA-29868 While Executing amviccn.sql	8-4
8.5	Merchant UI Menu Errors.....	8-5
8.6	Hierarchy Errors.....	8-6
8.7	Display Manager Errors	8-7
8.7.1	Display Manager Error Messages.....	8-7
8.8	Catalog Errors	8-8
8.8.1	Checkpoints.....	8-8
8.8.2	Specific Error Messages.....	8-9
8.9	Pricing Errors	8-12
8.9.1	Checkpoints.....	8-12
8.9.2	Generating a Pricing Debug Trace.....	8-12
8.9.3	Finding the User's Price List.....	8-13
8.10	Shopping List Errors	8-14
8.11	Search Errors	8-14

8.12	Notifications Errors	8-17
8.13	Storefront Reports Errors	8-19
8.14	Postsales Errors	8-20
8.15	Potential Issues Installing Oracle8i interMedia Text Version 8.1.7	8-21
8.15.1	Manually Installing ctxsys Data Dictionary	8-21
8.15.2	Post-Installation Setup	8-22
8.16	Reporting Issues.....	8-23
9	Integrating Oracle iStore 11i with Oracle Advanced Supply Chain Planning	
9.1	Overview of Oracle Advanced Supply Chain Planning.....	9-2
9.2	Setting Up Oracle Advanced Supply Chain Planning.....	9-2
10	Integrating Oracle iStore 11i with Oracle Configurator	
10.1	Overview of Oracle Configurator	10-2
10.2	Creating Configurable Product Models.....	10-2
10.3	Oracle iStore 11i Functionality with Oracle Configurator.....	10-3
10.3.1	Retrieving the Configurator UI	10-3
10.3.2	Changing the Oracle Configurator UI.....	10-4
10.4	Setting Up Oracle Configurator.....	10-4
10.5	Testing the Oracle Configurator Setup.....	10-6
10.6	Troubleshooting Oracle Configurator Integration	10-9
10.6.1	The Initialize and Terminate Messages.....	10-9
10.6.2	Common Oracle Configurator Integration Errors.....	10-11
11	Integrating Oracle iStore 11i with Oracle Contracts for Sales	
11.1	Overview of Oracle Contracts for Sales	11-2
11.2	Oracle iStore 11i Functionality with Oracle Contracts for Sales.....	11-2
11.3	Setting Up Oracle Contracts for Sales.....	11-4
12	Integrating Oracle iStore 11i with Oracle iPayment	
12.1	Overview of Oracle iPayment.....	12-2
12.2	Setting Up Oracle iPayment.....	12-2

13 Integrating Oracle iStore 11i with Oracle iSupport

13.1	Overview of Oracle iSupport.....	13-2
13.2	Setting Up Oracle iSupport.....	13-2

14 Integrating Oracle iStore 11i with Oracle Marketing Online

14.1	Overview of Oracle Marketing Online.....	14-2
14.2	Setting Up Oracle Marketing Online.....	14-2
14.2.1	Storefront Postings.....	14-2
14.2.2	Event Capture.....	14-4

15 Integrating Oracle iStore 11i with Oracle Shipping Execution

15.1	Overview of Oracle Shipping Execution	15-2
15.2	Setting Up Oracle Shipping Execution.....	15-2

16 Integrating Oracle iStore 11i with Oracle Web Cache

16.1	Overview of Oracle Web Cache	16-2
16.2	Oracle iStore 11i Functionality with Oracle Web Cache.....	16-2
16.3	Setting Up Oracle Web Cache	16-3
16.3.1	Perform Initial Setup for Oracle Web Cache.....	16-4
16.3.2	Create a Rule for Multiple Documents with Same Selector by Cookies	16-4
16.3.3	Create Session/Personalized Attribute Definitions.....	16-5
16.3.4	Create Session/Personalized Attribute Related Caching Rules.....	16-7
16.3.5	Create Cacheability Rules	16-8
16.3.6	Create Expiration Rules.....	16-10
16.3.7	Create a Selector Association for the Multiple Documents Rule	16-11
16.3.8	Create Selector Associations for Sessions and Personalized Attributes	16-12
16.3.9	Set Up Simple Personalization	16-14
16.3.10	Set Up HTTP Error Caching	16-14
16.3.11	Set Up Test Environment	16-15

17 Integrating Oracle iStore 11i with Oracle Workflow

17.1	Overview of Oracle Workflow	17-2
17.2	Oracle iStore 11i Functionality with Oracle Workflow	17-2
17.3	Setting Up Oracle Workflow.....	17-3
17.3.1	Planning Messages	17-3
17.3.2	Creating Messages.....	17-3

A Profile Options

A.1	Before You Begin	A-2
A.2	Setting Profile Options.....	A-2
A.3	Finding Responsibility ID Values	A-3
A.4	Oracle CRM Technology Foundation (JTT) Profile Options	A-4
A.4.1	JTT Profile Options for the Merchant UI.....	A-4
A.4.2	JTT Profile Options for Store Manager User Accounts.....	A-5
A.4.3	JTT Profile Options for the Guest User Account	A-5
A.5	Oracle iStore 11i (IBE) Profile Options for the Merchant UI.....	A-6
A.5.1	IBE Profile Options for Merchant UI Setup	A-6
A.5.2	IBE Profile Options for Storefront Reports	A-8
A.6	Oracle iStore 11i (IBE) Profile Options for the Customer UI.....	A-11
A.6.1	IBE Profile Options for the Catalog	A-11
A.6.2	IBE Profile Options for the Template Manager	A-17
A.6.3	IBE Profile Options for the Shopping Cart	A-17
A.6.4	IBE Profile Options for Express Checkout.....	A-20
A.6.5	IBE Profile Options for Postsales	A-21
A.6.6	IBE Profile Options for Notifications.....	A-22
A.6.7	IBE Profile Options for Caching.....	A-22
A.6.8	IBE Profile Options for Functionality	A-24
A.7	Other Oracle iStore 11i (IBE) Profile Options	A-27
A.8	Oracle Order Capture (ASO) Profile Options	A-29
A.9	Oracle Order Management (OM) Profile Options.....	A-31
A.10	Multiple Organization (MO) Profile Options.....	A-32
A.11	Oracle Bills of Material (BOM) Profile Options	A-33
A.12	Oracle Contracts Core (OKC) Profile Options	A-33
A.13	Concurrent Program Manager Profile Options.....	A-35
A.14	Site-Level Profile Options.....	A-35

B Seeded Responsibilities

B.1	Oracle Forms Responsibilities	B-2
B.2	Oracle CRM Applications Responsibilities	B-5
B.3	Oracle iStore 11i Customer UI Responsibilities	B-6

C Self-Service Administration

C.1	The iStore Self-Service Administrator UI.....	C-2
C.1.1	Benefits of Self-Service Administration	C-2
C.1.2	Components of Self-Service Administration.....	C-2
C.1.3	Restrictions of Self-Service Administration.....	C-3
C.1.4	Setting Up a Self-Service Administrator Account.....	C-3
C.1.5	Self-Service Administrator Profile Options.....	C-4
C.2	Home Page	C-6
C.2.1	Background Job Status Box.....	C-6
C.2.1.1	Searching for a Background Job.....	C-6
C.2.1.2	Background Job Details.....	C-7
C.3	Store.....	C-7
C.3.1	Defining the Store Site.....	C-7
C.3.2	Site	C-8
C.3.3	Language	C-8
C.3.4	Currency	C-9
C.3.5	Country	C-9
C.3.6	Payment.....	C-10
C.3.7	Tax	C-10
C.3.7.1	State Tax Item Exceptions	C-11
C.3.8	Shipping.....	C-12
C.3.9	Notification	C-13
C.3.10	Profile Preferences.....	C-16
C.3.10.1	Catalog.....	C-16
C.3.10.2	Shopping Cart.....	C-17
C.3.10.3	Orders	C-17
C.3.10.4	Contracts	C-17
C.3.11	Status.....	C-17
C.3.12	Store Front.....	C-18
C.3.13	Creating New Store Fronts	C-18

C.3.14	Editing Existing Store Fronts	C-19
C.3.15	Store Front Content	C-20
C.3.16	Bin Content Selection	C-20
C.3.17	Special Pages	C-21
C.3.18	Store Logo.....	C-22
C.3.19	Configuring Layout.....	C-22
C.3.19.1	Page Layout.....	C-22
C.3.19.2	Bin Locations.....	C-23
C.3.19.3	Display Styles.....	C-23
C.3.20	Selecting Colors	C-24
C.3.21	Store Front Preview.....	C-24
C.3.22	Setting the Default Store Front	C-25
C.4	Catalog	C-25
C.4.1	Sections	C-25
C.4.2	Creating New Sections	C-27
C.4.3	Editing Sections	C-28
C.4.4	Adding Items to Sections	C-28
C.4.5	Publishing Sections	C-29
C.4.6	Previewing Sections	C-29
C.4.7	Creating Items.....	C-30
C.4.7.1	Deleting Items.....	C-31
C.4.8	Searching for Items.....	C-31
C.4.8.1	View Filter	C-31
C.4.8.2	Simple Search.....	C-31
C.4.8.3	Advanced Search.....	C-31
C.4.9	Editing Items	C-31
C.4.10	Adding Sections to Items	C-32
C.4.11	Downloading Items.....	C-32
C.4.12	Uploading Items	C-33
C.4.13	Item File Format	C-34
C.4.13.1	Example of an Item CSV File.....	C-36
C.4.13.2	Example of an Item XML File.....	C-36
C.4.14	Multimedia	C-37
C.5	Pricing	C-38
C.5.1	Enabling Price Lists.....	C-38

C.5.2	Creating New Price Lists.....	C-38
C.5.3	Editing Price Lists	C-39
C.5.4	Adding New Products to Price Lists.....	C-39
C.5.4.1	Removing Products from Price Lists.....	C-40
C.5.4.2	Changing Product Prices	C-40
C.5.5	Downloading Prices.....	C-40
C.5.6	Uploading Prices	C-41
C.5.7	Price List File Formats	C-42
C.5.7.1	Example of a Price List CSV File.....	C-43
C.5.7.2	Example of a Price List XML File.....	C-44
C.5.8	Discount.....	C-45
C.5.8.1	Percentage Discount	C-46
C.5.8.2	Price Override.....	C-47
C.5.9	Searching for Discounts.....	C-47
C.5.9.1	View Filter	C-47
C.5.9.2	Simple Search	C-47
C.5.9.3	Advanced Search	C-47
C.5.10	Editing Discounts	C-47
C.5.11	Adding Eligible Customers to Discounts	C-48
C.5.12	Adding Eligible Items to Discounts.....	C-48
C.5.13	Enabling Discounts	C-49
C.5.13.1	Disabling Discounts.....	C-49
C.6	Orders.....	C-50
C.6.1	Searching for Orders.....	C-50
C.6.1.1	Simple Search	C-50
C.6.1.2	Advanced Search	C-50
C.6.2	Downloading Orders.....	C-51
C.6.3	Retrieving Orders.....	C-51
C.6.4	Order File Formats	C-52
C.6.4.1	Example of an Order CSV File	C-54
C.6.4.2	Example of an Order XML File	C-55
C.7	Currency and Language.....	C-57
C.7.1	Currency Codes.....	C-57
C.7.2	Language Mappings	C-65

Index

List of Figures

2-1	Oracle iStore 11 <i>i</i> Architecture.....	2-2
3-1	Oracle iStore 11 <i>i</i> Dependency Setup Process Flow	3-4
3-2	Typical Oracle iStore 11 <i>i</i> Integration With Other Oracle Applications.....	3-25
4-1	Oracle iStore 11 <i>i</i> Setup Process Flow.....	4-7
5-1	The Oracle iStore 11 <i>i</i> Merchant UI.....	5-13
5-2	UI Objects for the Global Store Home Page	5-18
5-3	The Oracle iStore 11 <i>i</i> Merchant UI Hierarchy Tab	5-23
5-4	Oracle iStore 11 <i>i</i> Search Tables.....	5-50
5-5	Storefront Reports Architecture	5-65
5-6	The Sign In Page	5-78
5-7	The B2B User's Profile Page.....	5-86
5-8	The B2B Administrative User's User Management Page.....	5-87
5-9	The B2B Administrative User's Role Management Page	5-88
6-1	The Multimedia Details Page	6-6
6-2	The Multimedia Component Details Page	6-10
6-3	Bin Layout on the Default Store Page	6-15
6-4	The Template Details Information and Source Files Page	6-19
11-1	Process Flow for Oracle iStore 11 <i>i</i> Contracts.....	11-3

List of Tables

2-1	Minimum Software Requirements.....	2-3
2-2	Minimum Hardware Requirements	2-4
3-1	Dependency Setup Checklist	3-4
3-2	Pricing Attributes Supported by Oracle iStore 11i	3-16
3-3	Qualifier Attributes Supported by Oracle iStore 11i.....	3-17
4-1	Oracle iStore 11i Setup Checklist	4-8
5-1	Global Store Home Page Layouts	5-19
5-2	Recommended Values for Global Store Profile Options	5-20
5-3	Search Profile Options	5-41
5-4	Oracle iStore 11i Notifications	5-53
5-5	Sample Configurations for the Notification Order Confirmation - Normal	5-54
5-6	Configurable Parameters for Notifications.....	5-55
5-7	Storefront Reports Formats.....	5-64
5-8	Fact Tables for Storefront Reports	5-65
5-9	iStore Reports Complete Data Refresh Set Begin Date Selection	5-70
5-10	iStore Reports Increment Data Refresh Set Begin Date Selection	5-72
5-11	Data Out Bin Drilldown Templates.....	5-74
5-12	Oracle iStore 11i Sign In Page Messages	5-77
5-13	Oracle iStore 11i Permissions.....	5-80
5-14	Oracle iStore 11i User Roles	5-83
6-1	Sample Media File Names for the Multimedia Name CompanyLogo.....	6-4
6-2	Sample JSP File Names for the Template Name ProductHome.....	6-16
14-1	Logical Template Names for Bins	14-3
16-1	Oracle iStore 11i Cookies for Welcome Bin Personalization.....	16-6
16-2	Oracle Web Cache Session and Personalized Attribute Definitions.....	16-6
16-3	Oracle Web Cache Session/Personalized Attribute Caching Rules	16-7
16-4	Oracle Web Cache Cacheability Rules	16-9
16-5	Oracle Web Cache Expiration Rules.....	16-11
16-6	Oracle Web Cache Session/Personalized Attribute Selector Associations	16-12
16-7	Oracle Web Cache Simple Personalization Selector Associations	16-14
17-1	Message Internal Name Prefixes for Oracle iStore 11i Notifications	17-4
17-2	Attributes for the Item Type iStore Alerts Workflow	17-5
17-3	Attributes for the Item Type iStore Alert Reports	17-6
A-1	JTT Profile Options for the Merchant UI.....	A-4
A-2	JTT Profile Options for Store Manager Users.....	A-5
A-3	JTT Profile Options for the Guest User	A-5
A-4	IBE Profile Options for Merchant UI Setup	A-6
A-5	IBE Profile Options for Storefront Reports	A-8
A-6	IBE Profile Options for Catalog—Sections	A-12

A-7	IBE Profile Options for Catalog—Items	A-14
A-8	IBE Profile Options for Catalog—Search	A-15
A-9	IBE Profile Options for Template Manager	A-17
A-10	IBE Profile Options for Shopping Cart	A-17
A-11	IBE Profile Options for Express Checkout	A-20
A-12	IBE Profile Options for Postsales	A-21
A-13	IBE Profile Options for Notifications	A-22
A-14	IBE Profile Options for Caching	A-23
A-15	IBE Profile Options for Functionality	A-24
A-16	ASO Profile Options	A-29
A-17	OM Profile Options	A-31
A-18	MO Profile Options	A-32
A-19	BOM Profile Options	A-33
A-20	OKC Profile Options	A-33
A-21	Profile Options for the Concurrent Program Manager	A-35
A-22	Site-Level Profile Options	A-35
B-1	Oracle Forms Responsibilities	B-2
B-2	Oracle CRM Applications Users and Responsibilities	B-5
B-3	Oracle iStore 11i Customer UI Users and Responsibilities	B-7
C-1	User-Level Profile Options for Self-Service Administrators	C-4
C-2	Self-Service Administrator Profile Options	C-5

Send Us Your Comments

Oracle iStore Implementation Guide, Release 11*i*

Part No. A92133-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Electronic mail: eccontent_us@oracle.com
- FAX: (650) 654-6208 Attn: Oracle iStore Documentation
- Postal service:
Oracle Corporation
Oracle iStore Documentation
500 Oracle Parkway, 60p4
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11*i* of *Oracle iStore Implementation Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle iStore 11*i*

If you have never used Oracle iStore 11*i*, Oracle suggests you attend one or more of the Oracle iStore 11*i* training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See [Other Information Sources](#) for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle iStore 11*i*.

- [Chapter 1](#) provides an introduction to Oracle iStore 11*i* and a brief description of its features.
- [Chapter 2](#) describes the Oracle iStore 11*i* architecture and lists minimum software and hardware requirements.

- [Chapter 3](#) summarizes Oracle iStore 11i's application dependencies and details required setups in the mandatory dependencies.
- [Chapter 4](#) provides an overview of the Oracle iStore 11i implementation process and its tasks.
- [Chapter 5](#) details the required implementation tasks for Oracle iStore 11i.
- [Chapter 6](#) details the optional implementation tasks for Oracle iStore 11i.
- [Chapter 7](#) describes tasks for verification of an Oracle iStore 11i implementation.
- [Chapter 8](#) provides tips for troubleshooting Oracle iStore 11i implementation, use, and administration.
- [Chapter 9](#) describes the integration of Oracle iStore 11i with Oracle Advanced Supply Chain Planning.
- [Chapter 10](#) describes the integration of Oracle iStore 11i with Oracle Configurator.
- [Chapter 11](#) describes the integration of Oracle iStore 11i with Oracle Contracts for Sales.
- [Chapter 12](#) describes the integration of Oracle iStore 11i with Oracle iPayment.
- [Chapter 13](#) describes the integration of Oracle iStore 11i with Oracle iSupport.
- [Chapter 14](#) describes the integration of Oracle iStore 11i with Oracle Marketing Online.
- [Chapter 15](#) describes the integration of Oracle iStore 11i with Oracle Shipping Execution.
- [Chapter 16](#) describes the integration of Oracle iStore 11i with Oracle Web Cache.
- [Chapter 17](#) describes the integration of Oracle iStore 11i with Oracle Workflow.
- [Appendix A](#) lists the profile options that are relevant to Oracle iStore 11i implementation and provides a procedure for setting profile options.
- [Appendix B](#) summarizes the responsibilities required to perform the Oracle iStore 11i implementation tasks described in this guide.
- [Appendix C](#) explains the usage of the iStore Self-Service Administrator user interface to implement Oracle iStore 11i.

Typographic Conventions

This manual uses the typographic conventions listed in the following table:

Convention	Meaning
<i>italic text</i>	Book titles
Courier text	User commands, file content examples, directory names
UPPERCASE	Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables
boldface text	Menu, button, keyboard, and form options, emphasis
< >	Angle brackets enclose user-supplied names. Note: Do not type the angle brackets.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle iStore 11*i*.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle iStore 11*i* shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle iStore 11*i*.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle iStore 11*i* (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle iStore Concepts and Procedures

This document provides users with information on general principles and procedures for maintaining Web stores using Oracle iStore 11*i*.

Oracle iStore API Reference Guide

This guide has information about Oracle iStore 11*i* Java APIs.

Oracle Advanced Planning and Scheduling Implementation and User's Guide

This guide describes the implementation of Oracle Advanced Supply Chain Planning, which you can set up to provide global inventory availability information for Oracle iStore 11*i*.

Oracle Applications Implementation Wizard User Guide

This guide explains how to use the Oracle Applications Implementation Wizard to facilitate the Oracle Applications implementation process.

Oracle Configurator Developer User's Guide

This guide explains the Oracle Configurator setup steps that allow the sale of configurable items through Oracle iStore 11*i*.

Oracle Contracts for Sales Concepts and Procedures

This guide describes the usage of Oracle Contracts for Sales, which provides contract negotiation and creation functionality when integrated with Oracle iStore 11*i*.

Oracle CRM Application Foundation Concepts and Procedures

This guide describes the usage of Oracle CRM Application Foundation to approve and maintain resources for Oracle CRM applications such as Oracle iStore 11*i*.

Oracle CRM Technology Foundation Concepts and Procedures

This guide explains the setup and usage of Oracle CRM Technology Foundation features that Oracle iStore 11*i* uses.

Oracle CRM Technology Foundation Implementation Guide

This guide provides information on setting up Oracle CRM Technology Foundation, a mandatory dependency for Oracle iStore 11*i*.

Oracle General Ledger User Guide

This guide provides information on setting up Oracle General Ledger, a mandatory dependency for Oracle iStore 11*i*.

Oracle HTML Quoting Concepts and Procedures

This guide explains how sales representatives can use Oracle HTML Quoting to view carts and orders that are placed in Oracle iStore 11*i*.

Oracle HTML Quoting Implementation Guide

This guide describes Oracle HTML Quoting roles that use Oracle iStore 11*i* permissions.

Oracle Inventory User's Guide

This guide provides information on setting up Oracle Inventory, a mandatory dependency for Oracle iStore 11*i*.

Oracle iPayment Concepts and Procedures

This guide describes the usage of Oracle iPayment, which provides credit card payment functionality for Oracle iStore 11*i*.

Oracle iPayment Implementation Guide

This guide describes the implementation of Oracle iPayment, which provides credit card payment functionality for Oracle iStore 11*i*.

Oracle iSupport Implementation Guide

This guide details the implementation of Oracle iSupport, which can be implemented with Oracle Telephony Manager to provide call-me-back functionality for Oracle iStore 11*i*.

Oracle Marketing Online Implementation Guide

This guide describes the implementation of Oracle Marketing Online, which creates marketing postings for display in the Oracle iStore 11*i* storefronts.

Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

This guide describes the usage of Oracle Material Requirements Planning, which works with Oracle Advanced Supply Chain Planning to provide global inventory availability information for Oracle iStore 11*i*.

Oracle Order Capture Concepts and Procedures

This guide explains how sales representatives can use Oracle Order Capture to view Oracle iStore 11*i* carts and orders.

Oracle Order Capture Implementation Guide

This guide provides information on setting up Oracle Order Capture, a mandatory dependency for Oracle iStore 11*i*.

Oracle Order Management User's Guide

This guide provides information on setting up Oracle Order Management, a mandatory dependency for Oracle iStore 11*i*.

Oracle Pricing User's Guide

This guide provides information on setting up Oracle Pricing, a mandatory dependency for Oracle iStore 11*i*.

Oracle Receivables User Guide

This guide provides information on setting up Oracle Receivables, a mandatory dependency for Oracle iStore 11*i*.

Oracle Shipping Execution User's Guide

This guide explains the setup of shipping parameters in Oracle Shipping Execution. Oracle iStore 11*i* can use these shipping parameters.

Oracle8*i* interMedia Text Reference

This guide explains how to set up synonym files in Oracle8*i* interMedia, a necessary step to implement synonym product search functionality in Oracle iStore 11*i*.

Oracle8*i* Server Administrator's Guide

This guide describes the administration of Oracle8*i*. It provides instructions on setting up Oracle interMedia when implementing Oracle iStore 11*i*'s product search.

Oracle9*i*AS Web Cache Administration and Deployment Guide

This guide explains the administration and deployment of Oracle Web Cache, which can be set up to cache and serve catalog and search pages for the Oracle iStore 11*i* storefront.

Using Oracle HRMS - The Fundamentals

This guide provides information on using Oracle Human Resources, a mandatory dependency for Oracle iStore 11*i*.

Implementing Oracle CRM: ERP Functional Checklist, Release 11i

This document provides information on the functional flows of Oracle Enterprise Resource Planning (ERP) Applications when integrated with Oracle Customer Relationship Management products. It is available on Oracle MetaLink.

Implementing Oracle CRM: Foundation Functional Checklist, Release 11i

This document provides information on the functional flows of other Oracle Foundation Applications when integrated with Oracle Customer Relationship Management products. It is available on Oracle MetaLink.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Other Implementation Documentation

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle iStore 11i implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to implement CRM Application Foundation correctly.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle iStore 11i and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle iStore 11i working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check OracleMetaLink alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction

This chapter provides an introduction to Oracle iStore 11*i*. Topics include:

- [Oracle CRM E-Commerce Suite Overview](#)
- [Oracle iStore 11i Overview](#)
- [New in this Release](#)
- [Obsolete in this Release](#)

1.1 Oracle CRM E-Commerce Suite Overview

Oracle CRM E-Commerce Suite, Release 11*i*, is a comprehensive Web-based solution for unassisted business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, and servicing via the Internet. It covers the entire spectrum of the e-commerce value cycle, from managing effective marketing campaigns to providing customer self-service. The Oracle CRM E-Commerce Suite encompasses the following:

- Merchant administration
- Affiliate linking
- Sophisticated catalog management
- Guided selling
- Merchandising
- Order management
- Payment processing
- Intelligence reporting

The following application products are included in the Oracle CRM E-Commerce Suite:

- Oracle HTML Quoting
- Oracle iStore
- Oracle iSupport
- Oracle Knowledge Management
- Oracle Marketing Encyclopedia System
- Oracle Order Capture
- Oracle Quality Online

Oracle CRM E-Commerce applications are part of the Oracle E-Business Suite, an integrated set of applications that is designed to transform your business into an e-business.

1.2 Oracle iStore 11i Overview

Oracle iStore 11i provides businesses from all industries with the ability to establish business-to-business and business-to-consumer electronic commerce. The Oracle iStore 11i application provides an easy-to-use mechanism for merchants to set up Internet storefronts that capture and process customer orders and to integrate their storefronts with Oracle Enterprise Resource Planning (ERP) applications.

1.2.1 Oracle iStore 11i Features

The key features and benefits of Oracle iStore 11i include the following:

- **Specialty stores** to create different stores within a single instance for serving different customer segments. Each store can have its own product selection, user interface, and process flows, while all the stores can utilize a unified, central merchant administration and repository of products and content.
- **A rich product catalog** that can display in multiple languages and currencies and is dynamically generated to reflect customer-specific product selection and pricing. The product catalog also supports a variety of relationships between products and product groups.
- **Oracle Configurator** for guided selling of complex products and configurable items
- **Sophisticated order capture** for customer-specific pricing, shipping and handling, and tax, and access to inventory availability
- **Channel integration** to leverage assets and processes, and to achieve a consistent customer experience across the contact points
- **Seeded roles and permissions** to offer personalized features for different customer segments and channel partners
- **Self-administration** that enables customers to manage store users and processes, thereby lowering operational costs
- **Personalization and recommendations** that cross-sell and up-sell items and improve the visits to purchase ratio for your Web stores
- **B2B functionality** that allows management of complex relationships with corporate customers in a self-service environment

1.3 New in this Release

The following features are new in this release:

- [Storefront Reports \(Data Out Bins\)](#)
- [Notification Mapping](#)
- [New Notifications](#)
- [Logical Mapping of Style Sheet, Menu, and Images](#)
- [Synonym Product Search](#)
- [Business-to-Business \(B2B\) User Automatic Approval](#)
- [Integration with Oracle Marketing Online's eMerchandising](#)
- [Integration with Oracle Web Cache](#)
- [Self-Service Administration](#)

Storefront Reports (Data Out Bins)

The Storefront Reports are pre-defined reports that collect and present valuable business data about your customers' interactions with your stores. Anyone with the required responsibility can view the reports as Data Out Bins in Oracle iStore 11i or in another application. Users can set their own Data Out Bin preferences.

Notification Mapping

Oracle iStore 11i sends notifications to users and sales representatives to inform them that a notification event has occurred. You can select the default message for each notification event and map other messages to the notifications according to organization and user type. You can also disable a notification event, either completely or for specific organization-user type combinations.

New Notifications

Five new notifications are included in this release:

- [Contract Negotiations Request - To Users](#)
- [Contract Negotiations Request - To Sales Representatives](#)
- [Contract Negotiations Request - Approval](#)
- [Contract Negotiations Request - Cancellation](#)
- [Contract Negotiations Request - Disapproval](#)

Logical Mapping of Style Sheet, Menu, and Images

Oracle iStore 11*i* now provides a powerful way to define storefront elements using the Merchant UI. The style sheet, menu elements, and images now have logical template mappings. These mappings eliminate the need to customize code when you change the catalog and menu appearance with custom images and a custom style sheet.

Synonym Product Search

The synonym product search functionality returns search results with product names that you have set up as synonyms of the users' search criteria.

Business-to-Business (B2B) User Automatic Approval

You can choose to activate automatic approval of business-to-business (B2B) users.

Integration with Oracle Marketing Online's eMerchandising

The seeded catalog section, catalog item, and shopping cart pages have dynamic bins that can display postings from Oracle Marketing Online's eMerchandising.

Integration with Oracle Web Cache

You can use Oracle Web Cache to cache and serve Oracle iStore 11*i* catalog and search pages. Oracle Web Cache can also cache Oracle iStore 11*i* style sheet files, static HTML pages, GIF and JPG/JPEG image files, and JavaScript (*.js) files.

Self-Service Administration

Oracle iStore 11*i*'s new self-service administration simplifies and accelerates the implementation of one specialty store with a single currency, language, and tax. This store can support only B2C users who are located in the United States.

1.4 Obsolete in this Release

The following features are obsolete in this release:

- **The Mona Lisa UI**—Only the CABO UI is now supported.

Technology, Requirements, and Performance

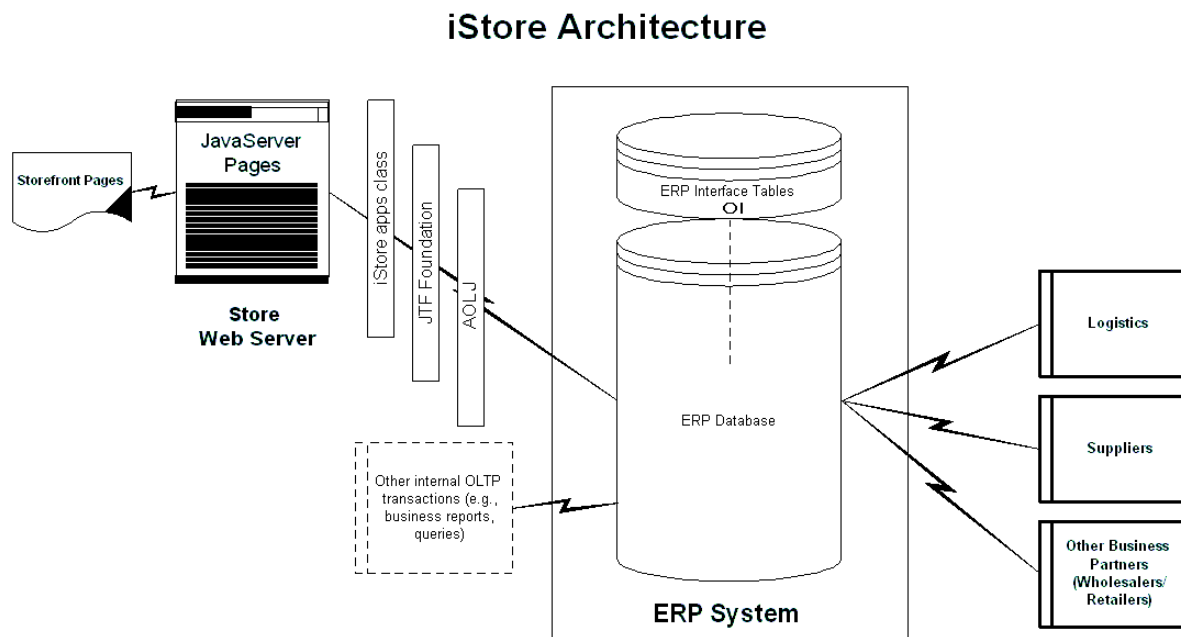
This chapter provides an overview of the architecture and requirements of Oracle iStore 11*i*. Topics include:

- [Architectural Overview](#)
- [Minimum Software Requirements](#)
- [Minimum Hardware Requirements](#)

2.1 Architectural Overview

In Oracle iStore 11i architecture, data is loaded and retrieved directly from ERP main tables. This functionality provides instant real time data status to Web stores and to other integrating systems and applications.

Figure 2–1 Oracle iStore 11i Architecture



2.2 Minimum Software Requirements

The minimum software requirements are listed in the following table.

Table 2–1 Minimum Software Requirements

Software	Requirement
Database	8.1.7 version of Oracle8i
Middle-Tier	The middle-tier requirements are an Apache 3.0 version Web server and Oracle Forms 6.0 server (as a part of Oracle ERP 11i implementation). For faster page serving, you can also use a caching server in front of the Web server series. The caching server (for example, Calypso) then serves the static content through the cached TCP/IP packets (or cached pages). An invalidated cache results in service requests being directed to the Web servers.

See the following Web sites for documentation of the required software:

- docs.oracle.com for Oracle8i and Oracle Forms documentation
- www.apache.org for Apache documentation

2.3 Minimum Hardware Requirements

The suggested hardware configuration for Oracle iStore 11i is a series of Web servers in the front and a high performance database server machine in the back end. With global systems, the necessity for high performance database servers is even greater.

Oracle recommends the following server requirements:

- ERP database server machine—high throughput at fast speed (CPU)
- Web servers running Apache for external customers
- One forms server for administration

You can determine the actual sizing of the machines after completing capacity planning.

Specific hardware requirements depend on the particular installation that you perform. The hardware requirements listed in the following table are guidelines only, and assume a single-node environment.

Table 2–2 *Minimum Hardware Requirements*

Hardware	Requirement
CPU	2 CPUs minimum, 4 or more highly recommended
Memory	256 MB minimum, 1GB or more highly recommended
Disk Space	22GB, including 1GB in /tmp (plus an additional 9GB if installing from a staging area)

Dependency Requirements and Verification

This chapter describes the setup of applications and other program functions on which Oracle iStore 11*i* depends. Topics include:

- [Mandatory Dependencies](#)
- [Conditional Dependencies](#)
- [Installation and Dependency Verification](#)

3.1 Mandatory Dependencies

Oracle iStore 11*i* integrates with many other Oracle application modules to provide and extend its functionality. You must set up the mandatory modules before Oracle iStore 11*i* can run. Setting up the optional modules is not required; however, if they are not set up, then the additional functionality provided by these modules will not be available.

The modules listed in this section must be set up for Oracle iStore 11*i* to function properly.

Oracle Application Object Library

Oracle Application Object Library (AOL) is a required dependency of all Oracle application modules. Oracle iStore 11*i* uses AOL to manage responsibilities of store managers as well as customers. You also define new languages and manage prompts for your store here.

Oracle General Ledger

Oracle General Ledger provides business unit information to Oracle iStore 11*i*.

Oracle CRM Technology Foundation

Oracle CRM Technology Foundation is a prerequisite for implementation of any Oracle CRM module. You set up properties in Oracle CRM Technology Foundation for debug logging trails and cookie encryption. You also specify default roles and responsibilities for users in this module.

Oracle Human Resources

Oracle Human Resources stores information related to your organizations, such as permitted bill-to and ship-to countries.

Oracle Inventory

Oracle Inventory is a required dependency for Oracle iStore 11*i*. The following information is set up in Oracle Inventory:

- Category structure to set intelligent defaults for the ways products can be displayed and for different multimedia components used to display products
- Item information

- Oracle Inventory itself requires at least one inventory organization to be set up and at least one business unit (organization) to be set up. In addition, it requires at least one product catalog group to be set up, even though you may not use it.

Oracle Order Capture

Oracle Order Capture provides pricing, shipping, and tax information for Oracle iStore 11*i*, and transforms Oracle iStore 11*i* shopping carts into orders in Oracle Order Management.

Oracle Order Management

Oracle Order Management (OM) processes orders from Oracle iStore 11*i* and provides order tracking, returns, and history. Oracle Order Management in turn depends upon Oracle Pricing and Oracle General Ledger. Oracle iStore 11*i* uses Oracle Order Management to keep records of orders placed by customers and pricing of those orders. It does so by using Oracle Order Capture APIs. Oracle Order Management in turn uses:

- Oracle Receivables for keeping records of customers and invoices, and capturing payments upon shipments
- Oracle Order Capture for collecting order information
- Oracle Pricing for determining prices of goods sold
- Oracle Shipping Execution for shipping execution

Note: Oracle Order Management in turn requires you to set up the inventory and business units as well as financials-related parameters.

Oracle Pricing

Oracle Pricing provides the prices of goods sold for Oracle iStore 11*i*. It enables complex, customer-specific pricing through price lists and pricing agreements.

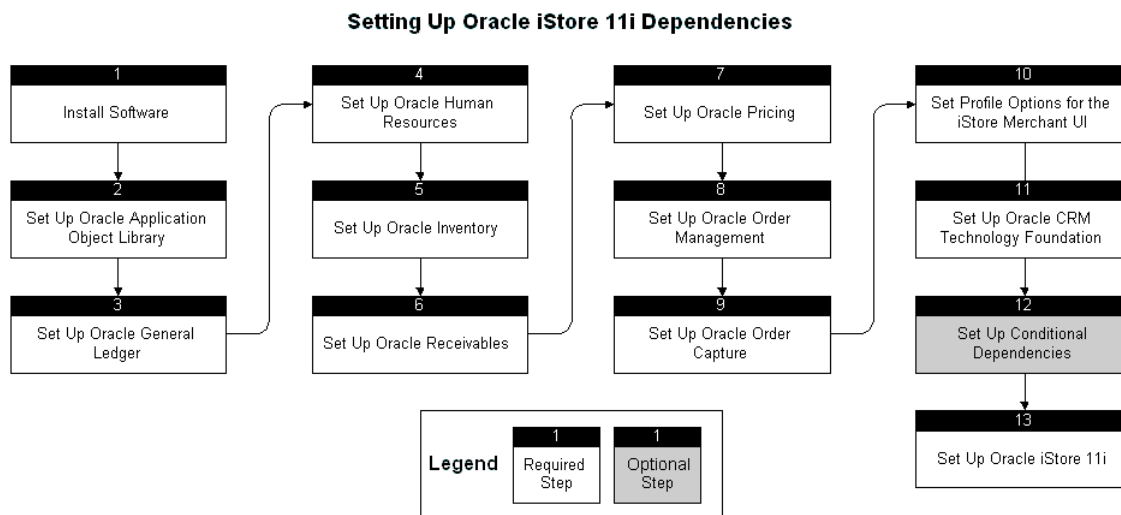
Oracle Receivables

Oracle Receivables is a central data repository for customer information that uses Oracle's Trading Community Architecture (TCA) model. It also calculates taxes and generates invoices.

3.1.1 Dependency Setup Process Flow

The following figure illustrates the suggested process flow for setting up Oracle iStore 11i dependencies. You must perform the required steps. You need to perform the optional steps only if you plan to use the related features or complete certain business functions.

Figure 3–1 Oracle iStore 11i Dependency Setup Process Flow



3.1.2 Dependency Setup Checklist

The following table lists the Oracle iStore 11i dependency setup steps.

Table 3–1 Dependency Setup Checklist

Step	Required/Optional	Reference
1. Install Software	Required	See <i>Installing Oracle Applications</i> .
2. Set Up Oracle Application Object Library	Required	Section 3.1.4, "Setting Up Languages and Currencies in AOL" , Section 3.1.5, "Setting Up Sales Assistance Prompts in AOL"
3. Set Up Oracle General Ledger	Required	Section 3.1.6, "Setting Up Oracle General Ledger"

Table 3–1 Dependency Setup Checklist (Cont.)

Step	Required/Optional	Reference
4. Set Up Oracle Human Resources	Required	Section 3.1.7, "Setting Up Oracle Human Resources"
5. Set Up Oracle Inventory	Required	Section 3.1.8, "Setting Up Product Items in Oracle Inventory", Section 3.1.9, "Setting Up Oracle Inventory for Regular Available to Promise (ATP)"
6. Set Up Oracle Receivables	Required	Section 3.1.10, "Setting Up Oracle Receivables"
7. Set Up Oracle Pricing	Required	Section 3.1.11, "Setting Up Oracle Pricing"
8. Set Up Oracle Order Management	Required	Section 3.1.12, "Setting Up Oracle Order Management"
9. Set Up Oracle Order Capture	Required	Section 3.1.13, "Setting Up Oracle Order Capture"
10. Set Profile Options for the iStore Merchant UI	Required	Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI"
11. Set Up Oracle CRM Technology Foundation	Required	Section 3.1.15, "Setting Up Oracle CRM Technology Foundation"
12. Set Up Conditional Dependencies	Optional	Chapter 9 through Chapter 17
13. Set Up Oracle iStore 11i	Required	Chapter 4, "Implementation Overview"

Using the Oracle Application Implementation Wizard

Use the Oracle Application Implementation Wizard (AIW) to coordinate dependency setups and identify the steps required to implement the Oracle iStore 11i application.

You can use the AIW to see the graphical overview of the steps involved, read online help on set up and open the appropriate forms. You can also document your actions for further reference and review.

Refer to *Oracle Application Implementation Wizard User's Guide* for more details.

3.1.3 Accessing Oracle Forms

Some setups for Oracle iStore 11i and its dependencies require that you use Oracle Forms. Launch Oracle Forms by navigating to:

`http://<host>:<apache port>/`

and clicking **Apps Logon Links > VIS Logon through the Forms cartridge**. When Oracle Forms launches, log in with the appropriate user name and responsibility to perform the required tasks.

3.1.4 Setting Up Languages and Currencies in AOL

Oracle Applications 11i allows you to have a setup with multiple languages and currencies against one instance. The languages and currencies that you enable determine the set of languages and currencies that you can select for your specialty stores.

Oracle iStore 11i supports the implementation of a global store in a single instance. Each specialty store can support multiple languages and currencies. Globalization is also supported in an environment with multiple business units or organizations.

Every registered Web store customer has a preferred language and currency associated in his or her user profile. The Web store customer can change the preferred language or currency by modifying his or her account profile.

For a given specialty store, you select languages and currencies from those languages and currencies enabled at the Oracle Applications level. Your specialty store will be available to users only in the languages and currencies that you select. This functionality provides you the flexibility to create both global and country-specific specialty stores. See [Section 5.5, "Creating Specialty Stores"](#) for further details about the globalization capabilities of Oracle iStore 11i stores.

See *Oracle Applications Concepts* and *Oracle Applications System Administrator's Guide* for information on setting up languages and currencies in AOL.

3.1.5 Setting Up Sales Assistance Prompts in AOL

Web store customers can request help from a sales representative through the Oracle iStore 11i Sales Assistance feature. Sales Assistance events proceed through the following sequence:

1. The user logs in to the store.
2. The user creates a shopping cart or activates an existing saved shopping cart.
3. The user proceeds to checkout.
4. In the Review Order and Confirm page, the user clicks the **Request Assistance** button.
5. In the sales assistance request page that opens, Oracle iStore 11i prompts the user to choose from a list of reasons why he or she needs assistance, and to enter any comments.
6. The user submits the request by clicking the **Submit Request** button.
7. Oracle iStore 11i saves the user's comments as notes associated with the cart. The application submits the shopping cart as an order with an Entered status.
8. Oracle iStore 11i sends a notification to the user's sales representative. See [Section 5.9.2, "Setting Up Notification Recipients"](#) for more information.
9. The sales representative can then contact the user, provide the necessary assistance, and book the order.

In AOL, you can activate and set up the list of reasons for needing assistance that customers choose from when using the Sales Assistance feature. You accomplish this by setting up lookup codes with meanings for the AOL lookup type IBE_SALES_ASSIST_REASONS_LK, using the AOL Lookups Form.

When you are ready to activate the Sales Assistance feature, set the profile option IBE: Use Sales Assistance Feature to **Yes**, as described in [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#). Using the Sales Assistance feature is optional.

Use the following procedure to set up lookup codes for the lookup type IBE_SALES_ASSIST_REASONS_LK.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose **Application > Lookups > Application Object Library**.
The Application Object Library Lookups window opens.
3. Choose **View > Find**.
The Lookup Types search window opens.
4. Select **IBE_SALES_ASSIST_REASONS_LK** and click **OK**.
The Application Object Library Lookups window is populated with the lookup codes for IBE_SALES_ASSIST_REASONS_LK.
5. In each row of the Application Object Library Lookups window, you can add a lookup code for a sales assistance request reason as follows:
 - a. In the Code field, enter the lookup code.
 - b. In the Meaning field, enter a meaning for the lookup code.
 - c. Optional: In the From and To fields, select the effective dates for the lookup code.
 - d. Check the Enabled checkbox.
6. Save the form.

3.1.6 Setting Up Oracle General Ledger

Because Oracle Order Management and Oracle Inventory require at least one Multi Org and associated set of books, you must create at least one business unit in Oracle General Ledger. See *Oracle Applications Concepts* for more information on business units and multi-org. See *Oracle General Ledger User Guide* for information on setting up business units.

Setup of daily currency conversion rates in Oracle General Ledger is a prerequisite for Oracle iStore 11i's Storefront Reports. See [Section 5.10.3, "Setting Up Conversion Rates for Storefront Reports"](#) for more information.

You must also perform the following tasks when setting up Oracle General Ledger:

- Define a chart of accounts in Oracle General Ledger, with a value set, an Accounting Flexfield Structure, and segments and segment values.
- Define a calendar.

- Define and enable currencies.
- Define a set of books.

See *Oracle General Ledger User Guide* for information on how to perform these tasks.

3.1.7 Setting Up Oracle Human Resources

You must perform the following tasks when setting up Oracle Human Resources:

- Set the profile option HR: User Type at the application and Global HRMS Manager responsibility levels. This profile option is required for accessing the work structures.
- Define a Business Group.
- Define locations.
- Define a legal entity and operating unit.
- Define employees.

See *Using Oracle HRMS - The Fundamentals* for information on how to perform these tasks.

Creating global specialty stores also depends on setups for your organizations in Oracle Human Resources. Use Oracle Human Resources to specify the permitted bill-to and ship-to countries for each of your operating units. You can associate each of these operating units to different customer user responsibilities, as [Section 5.12.4, "Setting Multiple Organization \(MO\) Profile Options"](#) explains.

In Oracle iStore 11i, you can then set up each of your specialty stores to support specific responsibilities. You can also set up each of your specialty stores to include or exclude B2B users by their own organization affiliations, for a higher degree of control over the extent of globalization available to each customer.

The Oracle Human Resources bill-to and ship-to country setups for each of the operating units associated with these responsibilities will determine the extent of globalization of each specialty store for each user.

Use the following procedure to set up bill-to and ship-to country information for an organization. See *Using Oracle HRMS - The Fundamentals* for more information.

Steps

1. Log in to Oracle Forms with the Human Resources responsibility.
2. Choose **Work Structures > Organization > Description**.
The Find Organization window opens.
3. In the Find Organization window, enter the search criteria for your merchant organization and click **Find**.
The Organization form opens with the organization's record.
4. In the Organization Classifications region, select **Operating Unit** in the Name fields.
5. Click **Others**.
The Additional Organization Information window opens.
6. In the Additional Organization Information window, enter %Country in the Find field and click **Find**.
7. In the search results, choose **Bill to Country** and click **OK**.
The Additional Organization Information window for Bill to Country opens.
8. Place your cursor in a Bill to Country field.
The Bill to Country window opens.
9. Add countries to the Additional Organization Information window for Bill to Country as follows:
 - a. In the Bill to Country window, click the Bill to Country LOV button.
The Bill to Country search window opens.
 - b. Search for a country, highlight it, and click **OK**.
The Bill to Country field in the Bill to Country window is populated with the value of this country.
 - c. Click **OK** to add the country to the Additional Organization Information window for Bill to Country.
 - d. Repeat for each country that you want to allow as a bill-to country for this merchant organization.
10. When you are finished adding countries, click **OK** in the Additional Organization Information window for Bill to Country.

You return to the Organization form with the organization's record.

11. In the Organization Classifications region, select **Operating Unit** in the Name fields.
12. Click **Others**.

The Additional Organization Information window opens.
13. In the Additional Organization Information window, enter %Country in the Find field and click **Find**.
14. In the search results, choose **Ship to Country** and click **OK**.

The Additional Organization Information window for Ship to Country opens.
15. Place your cursor in a Ship to Country field.

The Ship to Country window opens.
16. Add countries to the Additional Organization Information window for Ship to Country as follows:
 - a. In the Ship to Country window, click the Ship to Country LOV button.

The Ship to Country search window opens.
 - b. Search for a country, highlight it, and click **OK**.

The Ship to Country field in the Ship to Country window is populated with the value of this country.
 - c. Click **OK** to add the country to the Additional Organization Information window for Ship to Country.
 - d. Repeat for each country that you want to allow as a ship-to country for this merchant organization.
17. When you are finished adding countries, click **OK** in the Additional Organization Information window for Ship to Country.

You return to the Organization form with the organization's record.

3.1.8 Setting Up Product Items in Oracle Inventory

Oracle Inventory serves as the repository of product items that can be sold through Oracle iStore 11i. Use Oracle Inventory to create new items, then create additional content for the Web through the Oracle iStore 11i Merchant UI. Before you can create items in Oracle Inventory, you must set up and define the structure around it. Refer to *Oracle Inventory User's Guide* for details of inventory setup.

Guidelines

While making decisions about inventory setup, use the following guidelines:

- Products must have their Web Status set to either Published or Unpublished to appear in the Oracle iStore 11i Merchant UI. The Web Status can be changed later in Oracle Inventory or Oracle iStore 11i.
- Items that will be sold through the Web must be set with the following flags in the Oracle Inventory Master Item form:
 - Web Status = Published
 - Orderable on the Web
 - Customer Orders Enabled
- Oracle iStore 11i uses the category structure to keep track of default ways of displaying products as well as default values for multimedia components associated with the product. All items belonging to a category in specified category sets are treated similarly from a display perspective. In Oracle iStore 11i setup, you set the IBE: Category Set profile option to a category set value that enables Oracle iStore 11i to differentiate between items based on the categories they belong to within this category set. Items in the same category in this category set are treated as homogenous from display and multimedia default perspectives.

If you are planning to sell items of different types (e.g., books vs. computers) and need to display them differently (i.e., use different templates) then you should create two different categories within this category set. If you do not have the flexibility to do so, then you can specify the display properties at the item level. Refer to [Chapter 6](#) for more details.

- Set up flexfields to capture additional information about items, if necessary.
- Oracle iStore 11i requires one Inventory Organization to be identified against which the product catalog is built. Typically this would be the Master Inventory Organization.

- In a multiple operating unit environment, the Master Inventory Organization should consist of all the items from all the operating units. If you need to separate the items to be sold from each operating unit into different Inventory Organizations, create a separate Inventory Organization for each operating unit. These operating unit Inventory Organizations should exist only as subsets of the Master Inventory Organization. Separate items from different operating units in the Web stores by setting up each operating unit with its own Web store sub-hierarchy within the main Oracle iStore 11i hierarchy. See [Section 5.6, "Creating the Hierarchy"](#) for more information about setting up the Oracle iStore 11i hierarchy.

Steps

Product information resides in the MTL_SYSTEM_ITEMS table in Oracle Inventory. The following minimum Oracle Inventory setups are required:

1. For each item, set the following flags in the Master Item form:
 - Web Status = Published or Unpublished (in the form's Web Option tab)
 - Orderable On the Web (in the form's Web Option tab)
 - Customer Orders Enabled (in the form's Order Management tab)

These settings are required to display products in the Merchant UI.

2. In Inventory, map inventory items to organizational IDs (organizational IDs are set in General Ledger). This mapping determines the inventory items that specific organizational IDs can view.
3. Enter product descriptions.

You must also perform the following tasks when setting up Oracle Inventory:

- Set the profile option HR: User Type at the application and Inventory responsibility levels. This profile option is required for accessing the work structures.
- Set the profile option INV: Default Item Status at the desired levels. This profile option specifies a default item status. If this profile is not set, you must provide the item status for every item.
- Disable the seeded item catalogs, item categories, and stock locator flexfields if you do not plan to use them.
- Delete the seeded item types if you do not plan to use them.
- Define organization calendars.

- Define the Unit of Measure class and units of measure.
- Define shipping methods.

See *Oracle Inventory User's Guide* for information on how to perform these tasks.

Note: You may be able to set up Oracle Inventory using the iStore Self-Service Administrator UI instead of Oracle Forms. See [Appendix C](#) for details.

3.1.9 Setting Up Oracle Inventory for Regular Available to Promise (ATP)

Oracle iStore 11i can provide regular available to promise (ATP) information on inventory items without customization. Oracle iStore 11i checks the ON_HAND_QTY field in the Oracle Inventory ATP columns to determine the availability of items requested in the Web stores. You must set up ATP in Oracle Manufacturing, define ATP sourcing rules in Oracle Inventory, and enable product items for ATP by setting their ATP and ATP component flags. See *Oracle Inventory User's Guide* for instructions on setting up ATP rules in Oracle Inventory for regular ATP.

If you want to enable global ATP for Oracle iStore 11i, you must install Oracle Advanced Supply Chain Planning and Oracle Material Requirements Planning. These modules will create global ATP rules that populate the ATP columns in Oracle Inventory. See [Chapter 9, "Integrating Oracle iStore 11i with Oracle Advanced Supply Chain Planning"](#) for more information on enabling global ATP.

3.1.10 Setting Up Oracle Receivables

Oracle iStore 11i uses Oracle Receivables to record customer information and tell customers about their invoices and payments. Customer registration information is maintained in the TCA/Oracle Receivables schema. At a minimum, you need to perform the required Oracle Receivables setups, including tax options, address validation, and the Sales Tax Location Flexfield Structure, as described in *Oracle Receivables User's Guide*.

Caution: Changing the Sales Tax Location Flexfield Structure in Oracle Receivables after data has been entered can corrupt data in the application.

You must also turn Automatic Site Numbering on. Use the following procedure to activate Automatic Site Numbering in Oracle Receivables.

Steps

1. Log in to Oracle Forms with the Receivables Manager responsibility.
2. Choose **Setup > System > System Options**.
The System Options window opens.
3. In the Trans and Customers tab, check the Automatic Site Numbering checkbox.
4. Save the form.

3.1.11 Setting Up Oracle Pricing

Setting up Oracle Pricing is one of the required steps for Oracle Order Management but is described here separately. For each item that you plan to sell, you must specify the price in at least one price list and make that price list available to customers.

In Oracle iStore 11i, you will choose the default price lists for walk-in users, registered users, and B2B users in each specialty store. (See [Section 5.5, "Creating Specialty Stores"](#) for more details.) For walk-in users, Oracle iStore 11i always uses the specified price list to show item prices on product catalog pages in the store, and to price the shopping cart. For registered and B2B users, Oracle iStore 11i also uses the price lists that you chose in the Merchant UI for registered and B2B users if the profile option IBE: Use Price list associated with Specialty Store is set to **Yes**. If this profile option is set to **No**, Oracle iStore 11i passes a null price list with the party ID and account ID to Oracle Pricing. Oracle Pricing then determines a price list for which the user qualifies.

The catalog cache caches product prices for walk-in users according to price list ID. If you are using responsibility-based Oracle Pricing modifiers to provide product prices for walk-in users based on responsibility ID, you must disable the catalog cache so that Oracle iStore 11i will call Oracle Pricing to determine prices. You can set the profile option IBE: Cache On to **No** to disable the catalog cache. However, disabling the cache can diminish store performance.

Using Oracle Pricing, you can also set up advanced promotions and discounts. Oracle iStore 11i uses the Oracle Pricing engine to determine the best price that the customer can get based on the items in the shopping cart and the customer. You set up your pricing rules in Oracle Pricing. Oracle iStore 11i supports certain pricing attributes and customer-requested qualifiers (promocodes) that are set up in Oracle Pricing.

Pricing attributes are used to determine what is priced by Oracle Pricing. They refer to the product that is being sold. For example, if you use the pricing attribute "Item

Category," your promotions and discounts apply to an entire category of items rather than to a single item number.

The following table lists the pricing attributes that Oracle iStore 11i supports.

Table 3–2 Pricing Attributes Supported by Oracle iStore 11i

Attribute Name	Context	Pricing Level
ALL_ITEMS	Item	Line
Inventory Item Id	Item	Line
Item Amount	Line Volume	Line
Item Category	Item	Line
Item Quantity	Line Volume	Line
Model Id	Pricing Attributes	Line
Parent List Price	Pricing Attributes	Line
Period1 Item Quantity	Line Volume	Line
Period2 Item Quantity	Line Volume	Line
Period3 Item Quantity	Line Volume	Line
Segment 1 (Key item flexfield segments)	Item	Line
Segment 10	Item	Line
Segment 11	Item	Line
Segment 12	Item	Line
Segment 13	Item	Line
Segment 14	Item	Line
Segment 15	Item	Line
Segment 16	Item	Line
Segment 17	Item	Line
Segment 18	Item	Line
Segment 19	Item	Line
Segment 2	Item	Line
Segment 20	Item	Line
Segment 3	Item	Line

Table 3–2 Pricing Attributes Supported by Oracle iStore 11i (Cont.)

Attribute Name	Context	Pricing Level
Segment 4	Item	Line
Segment 5	Item	Line
Segment 6	Item	Line
Segment 7	Item	Line
Segment 8	Item	Line
Segment 9	Item	Line

Qualifier attributes determine who qualifies for a given adjustment. They refer to customer information and shopping cart or order information such as payment terms and shipment method. For example, by using the qualifier attribute "Customer Class," you can ensure that only customers in a given class qualify for a promotion or discount.

The following table lists the qualifier attributes that Oracle iStore 11i supports.

Table 3–3 Qualifier Attributes Supported by Oracle iStore 11i

Attribute Name	Context	Pricing Level
Account Type	Customer	Line/Header
Agreement Name	Customer	Line/Header
Agreement Type	Customer	Line/Header
Bill To	Customer	Line/Header
Customer Class	Customer	Line/Header
Customer Name	Customer	Line/Header
Customer PO	Order	Line
GSA Indicator	Customer	Line/Header
Invoice To Party Site	Customer	Line/Header
Line Category	Order	Line
Line Type	Order	Line
Line Volume	Volume	Line
Line Weight	Volume	Line

Table 3–3 Qualifier Attributes Supported by Oracle iStore 11i (Cont.)

Attribute Name	Context	Pricing Level
Market Segment	Segment	Line/Header
Order Amount	Volume	Header
Order Amount	Volume	Line
Order Category	Order	Line
Order Qty	Volume	Line
Order Type	Order	Line/Header
Party Id	Customer	Line/Header
Payment Terms	Terms	Line/Header
Price List	Modlist	Line/Header
Pricing Date	Order	Line
Promotion Number	Modlist	
Request Date	Order	Line
Sales Channel	Customer	Line/Header
Ship To	Customer	Line/Header
Ship To Party Site	Customer	Line/Header
Shippable Flag	Order	Line
Shipping Terms	Terms	Line/Header
Site Use Id	Customer	Line/Header
Target Segment	Segment	Line/Header
Territory	Territory	Line/Header

You can also create pricing agreements in Oracle Order Management or Oracle Pricing. Pricing agreements set up the billing specifications that allow a quote to be priced. The attributes of a pricing agreement are price list, purchase order number, bill-to address, bill-to contact, invoicing terms, payment terms, and shipment terms. These attributes set up and apply default pricing rules in Oracle Order Management. Each pricing agreement can have only one price list assigned to it, but one list can be linked to multiple agreements. You can create universal and customer-specific pricing agreements.

At a minimum, you must set up qualifiers and modifiers in Oracle Pricing to support Oracle iStore 11i.

Steps

1. Set qualifiers in Oracle Pricing. Qualifiers are used to calculate item prices.
2. Set modifiers in Oracle Pricing. Modifiers determine discounts or can be used to calculate shipping costs.

When setting up Oracle Pricing sourcing rules, the sourcing rules for Oracle Order Capture and Oracle Order Management must be identical. The qualifiers for these sourcing rules must also be identical. See *Oracle Pricing User's Guide* for more information.

Note: You may be able to set up Oracle Pricing using the iStore Self-Service Administrator UI instead of Oracle Forms. See [Appendix C](#) for details.

3.1.12 Setting Up Oracle Order Management

Oracle iStore 11i uses Oracle Order Management to record customer orders, set up payment options and shipping options, and provide order status and shipping information to customers. You must perform the following tasks when setting up Oracle Order Management:

- Define the system parameters Operating Unit, Item Validation Organization, and Customer Relationships.
- Define transaction types at header and line level for orders.
- Define order number sequence.
- Set up defaulting rules.

See *Oracle Order Management User's Guide* for information on setting up Oracle Order Management.

Web-Enabled Shipping Methods

To set up Web-enabled shipping methods within the Order Management Super User responsibility, use the following procedure. This procedure is necessary to make shipping methods available to your customers in your Web stores.

Steps

1. Log in to Oracle Forms with the Order Management Super User responsibility.
2. Choose **Shipping > Setup > Freight > Define Carrier Ship Methods**.
3. Select **Find All** from the View menu.
4. Check the Web Enabled box next to the shipping methods that you want to make available through the Web stores.
5. Save the record.

Restricting Items Based on Operating Units

In a multiple operating unit environment, you need to set up the associations between the operating units and the Inventory Organizations in Oracle Order Management. Each of the Inventory Organizations will be a subset of the main Inventory Organization.

Oracle iStore 11*i* uses these associations to limit the items that customers can access in the operating units' Web stores. You create a separate IBE customer responsibility for each operating unit in Oracle Forms. See [Section 5.12.4, "Setting Multiple Organization \(MO\) Profile Options"](#) for more information about associating responsibilities with operating units.

Each customer name is assigned one of these responsibilities when the customer name is approved. When a customer enters a Web store, Oracle iStore 11*i* notes the customer's responsibility and the operating unit to which it is assigned, then uses the Inventory Organization associated with the operating unit to restrict customers to the items in the Inventory Organization. See [Section 5.5, "Creating Specialty Stores"](#) for instructions on choosing the responsibilities that are supported by a specialty store.

Specify the Item Validation Organization associated with each operating unit through Oracle Order Management.

Note: You may be able to set up Oracle Order Management using the iStore Self-Service Administrator UI instead of Oracle Forms. See [Appendix C](#) for details.

3.1.13 Setting Up Oracle Order Capture

Oracle iStore 11i uses Oracle Order Capture to integrate with Oracle Order Management and Oracle Receivables. Oracle iStore 11i sends carts and orders from the Web stores to Oracle Order Capture. Oracle Order Capture saves the carts as quotes and passes the orders to Oracle Order Management. The Oracle Order Capture quote name becomes the same as the Oracle iStore 11i cart name when the user saves the cart.

See *Oracle Order Capture Concepts and Procedures* for information on using Oracle Order Capture to view Oracle iStore 11i carts and orders.

Note: Quotes and orders created in Oracle Order Capture can also be viewed in Oracle iStore 11i.

The allowable quote status transitions for Oracle iStore 11i shopping carts are set up in Oracle Order Capture. See *Oracle Order Capture Implementation Guide* for information on how to set up quote status transitions.

Oracle iStore 11i's Customer UI displays payment types in the Payment Book, Express Checkout Preferences, and checkout pages from the FND_LOOKUP_VALUES table for the Oracle Order Capture lookup type ASO_PAYMENT_TYPE. The seeded values for ASO_PAYMENT_TYPE are credit card, cash, check, purchase order, faxed credit card, and invoice. The Customer UI displays only the payment types that are marked as Enabled in the lookup table. See *Oracle Order Capture Implementation Guide* for information on how to set up the Oracle Order Capture lookup type ASO_PAYMENT_TYPE.

Note: If the credit card payment type is not enabled, the Oracle iStore 11i Payment Book and Express Checkout features are disabled. The Payment Book stores credit card information only, and Express Checkout is only possible with credit card payment.

When a user places an order in Oracle iStore 11i, Oracle Order Capture passes the order to Oracle Order Management with the status specified in the profile option ASO: Default Order State. Orders with the status Entered can be modified in Oracle Order Management. Orders with the status Booked cannot be modified in Oracle Order Management.

Note: If the user chooses to pay by credit card or purchase order, but does not enter a credit card number or purchase order number, respectively, Oracle Order Capture passes the order to Oracle Order Management with an Entered status regardless of the setting of the profile option ASO: Default Order State.

3.1.14 Setting Profile Options for the Oracle iStore 11i Merchant UI

You must set some Oracle CRM Technology Foundation (JTT) and Oracle iStore (IBE) profile options to enable Oracle iStore 11i's Merchant UI. These profile options must be set before the Merchant UI can be launched.

See [Section A.2, "Setting Profile Options"](#) for instructions on setting profile options.

Setting JTT Profile Options for the Merchant UI

Set the following JTT profile options at both the site level and the application level for iStore:

- JTF_PROFILE_DEFAULT_APPLICATION
- JTF_PROFILE_DEFAULT_BLANK_ROWS
- JTF_PROFILE_DEFAULT_CSS
- JTF_PROFILE_DEFAULT_CURRENCY
- JTF_PROFILE_DEFAULT_NUM_ROWS
- JTF_PROFILE_DEFAULT_RESPONSIBILITY (application level only)

See [Section A.4.1, "JTT Profile Options for the Merchant UI"](#) for profile option descriptions and values.

Setting IBE Profile Options for the Merchant UI

Set the following mandatory IBE profile options at the application level for iStore:

- IBE: Category Set
- IBE: Item Validation Organization

Optionally, you can set the profile option IBE: Item Validation Organization at responsibility level for IBE_ADMINISTRATOR or another store manager responsibility, or at user level for a store manager user.

You can also set the following optional iStore (IBE) profile options at the application level for iStore if you do not want to use the default settings:

- IBE: Number of Days for New Item Definition
- IBE: Use Database for Media Storage (site level)

See [Section A.5, "Oracle iStore 11i \(IBE\) Profile Options for the Merchant UI"](#) for profile option descriptions and values.

3.1.15 Setting Up Oracle CRM Technology Foundation

You must implement Oracle CRM Technology Foundation as described in *Oracle CRM Technology Foundation Implementation Guide*. After this implementation, set up host configuration, logging trail properties, and cookie properties as described below. See *Oracle CRM Technology Foundation Concepts and Procedures* for detailed instructions.

Host Configuration

When you build the Oracle CRM Technology Foundation deployment configuration, you must set up all middle-tier hosts. For each host on which you will deploy Oracle iStore 11i, include **iStore** in the host's deployed applications list.

Logging Trail Properties

When setting up the Oracle CRM Technology Foundation logging trails, set the framework logging and service logging levels to **DEBUG**.

Cookie Properties

The user session in Oracle iStore 11i is controlled and identified through cookies. The cookies are set on the user's browser and are used to identify return customers and other related data. The Oracle iStore 11i process is transparent to cookie administration, setup and control. Cookies are managed by Oracle CRM Technology Foundation methods. If the user turns off browser cookies, Oracle CRM Technology Foundation ensures that the information is available through the URL.

The cookie domain is set as the Web server domain, for example, "oracle.com" for Oracle's online store. Once the user registers, the user account is created in the database and is used in the cookies to identify the customer. If the user is unregistered or anonymous, a guest user account is used in the cookies.

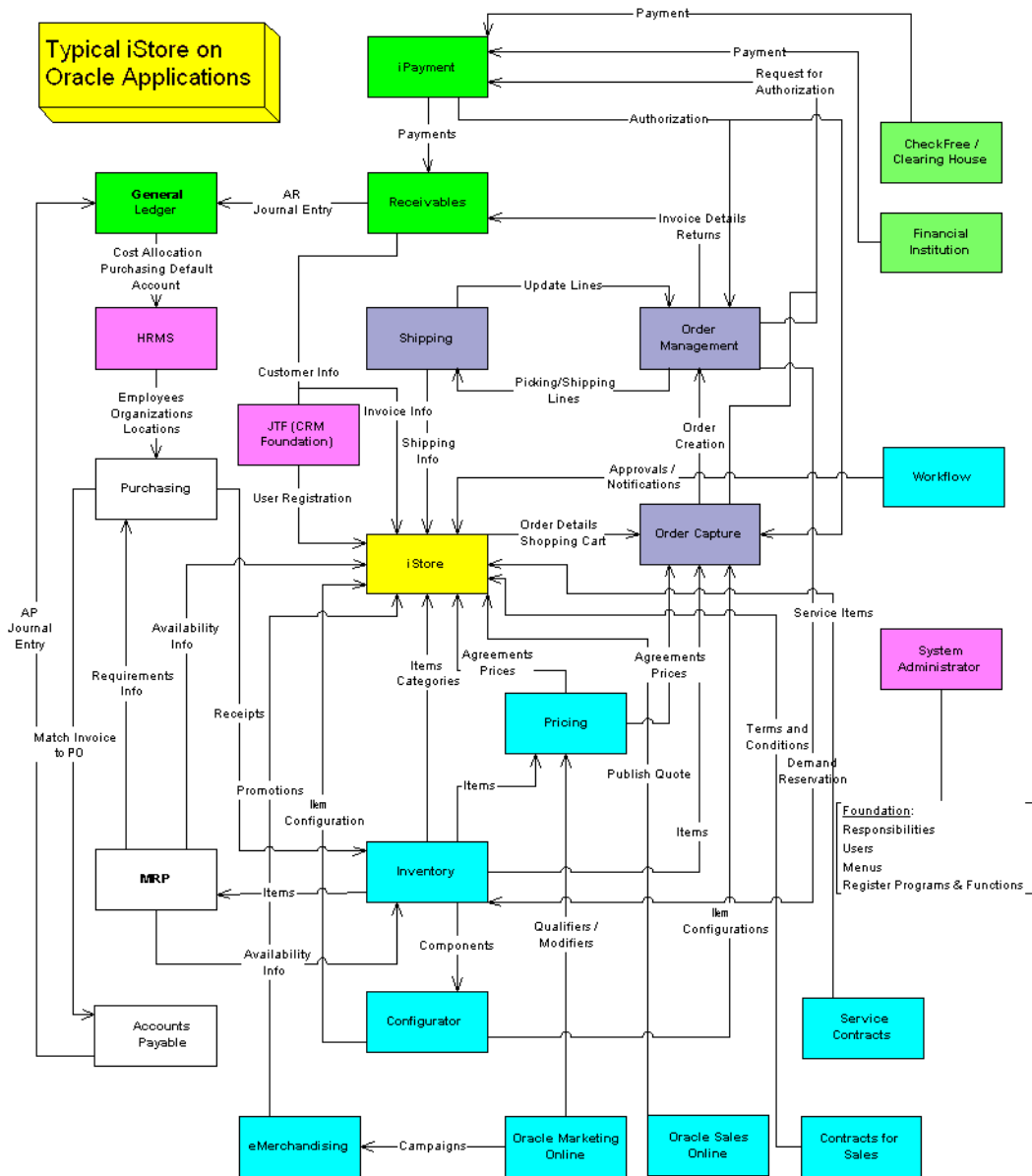
If you want to enable cookie encryption, you must specify an encryption key when setting up cookie properties in Oracle CRM Technology Foundation.

3.2 Conditional Dependencies

The following Oracle applications modules can be set up to provide additional functionality for your electronic store:

- **Oracle Advanced Inbound** to process call-me-back requests
- **Oracle Advanced Supply Chain (Global ATP Server)** to provide product availability information
- **Oracle Configurator** to enable customer configured products, provide guided selling, and perform some of the validations of the shopping cart
- **Oracle Contracts** for complete contract management and service agreements
- **Oracle CRM Business Intelligence** to assess the performance of the store
- **Oracle Incentive Compensation** to manage sales compensation across all channels
- **Oracle iPayment** to process payments with online credit card authorization
- **Oracle iSupport** to provide return authorizations and knowledge base integration
- **Oracle Marketing Online** to define, execute, and manage marketing campaigns, budgets, and segments across all channels, and to define promotions and discounts
- **Oracle Material Requirements Planning** to provide product availability information
- **Oracle Shipping** to calculate shipping charges
- **Oracle Web Cache** to serve the non-SSL catalog content
- **Oracle Workflow** to send e-mail notifications and confirmations to customers

Figure 3-2 Typical Oracle iStore 11i Integration With Other Oracle Applications



3.3 Installation and Dependency Verification

Before you start configuring the profile options and creating the product catalog in Oracle iStore 11i, check that you have completed the following prerequisites.

1. Verify that the installation and middle tier setups have been done correctly.

Once the Rapid Installer Wizard finishes the installation, verify the proper installation and configuration of the following components:

- **Apache Server:** Go to `http://<host>:<apache port>/apachedocs/`. You should see the Apache Server documentation page.
 - **Apache JServ:** Go to `http://<host>:<apache port>/servlets/IsItWorking`. You should see a message verifying that Apache JServ is working.
2. Verify that the ERP applications are installed and functioning properly. Refer to the *Implementing Oracle CRM: ERP Functional Checklist, Release 11i* document available on Oracle MetaLink for a description of the tasks required.
 3. Verify that the dependency setup has been done correctly.

Place an order through Sales Orders Workbench. If it goes through without errors, then your core dependency setup has been done correctly. To find how to place an order, see *Oracle Order Management User's Guide*.

Implementation Overview

This chapter provides an overview of the tasks required to set up Oracle iStore 11*i* after you have verified your installation and dependency setup. Topics include:

- [Process Overview](#)
- [Implementation Task Sequence](#)

Note: When using the Oracle iStore 11*i* Merchant UI, ensure that cookies are enabled for your browser. See the relevant browser documentation for information on enabling cookies.

4.1 Process Overview

Oracle iStore 11*i* ships with templates and defaults that allow you to develop basic stores. By performing the setup tasks described in [Chapter 5, "Required Implementation Tasks"](#) to set up the Customer UI, you can create fully operational online stores.

Additionally, you can customize and add functionality as required by performing the setup tasks described in [Chapter 6, "Optional Implementation Tasks"](#) and by implementing other Oracle Applications modules that are conditional dependencies for Oracle iStore 11*i*.

Planning the customization of your store involves the following tasks:

- Identify the ways in which the store will display products.
- Plan page designs and divide them into common components that you can make into templates.
- Invent a name for each possible template to facilitate planning and communication of designs.
- Customize templates now as part of the design or later in the setup cycle.

Once you have completed these planning tasks, you can perform the implementation tasks listed in [Chapter 6, "Optional Implementation Tasks"](#) to customize your store.

The following procedure suggests the sequence of steps you can use to create and customize your stores.

Prerequisites

- You have set up the mandatory dependencies as described in [Section 3.1, "Mandatory Dependencies"](#).
- You have set up any conditional dependencies required for functionality that you want to include in your specialty stores. (You can also perform conditional dependency setup after you have implemented Oracle iStore 11*i*. In this case, you may need to return to Oracle iStore 11*i* to modify the implementation.)

Steps

1. Set up store manager accounts. Required.

You need a store manager user account to access the Oracle iStore 11*i* Merchant UI, where you will perform the majority of the Oracle iStore 11*i* implementation

and administration tasks. Typically, the store manager user account has the responsibility IBE_ADMINISTRATOR.

2. Set up the concurrent program manager. Required.

The concurrent program manager runs all Oracle iStore 11*i*-related concurrent programs with the responsibility iStore Concurrent Programs Responsibility. These concurrent programs are required to set up the Customer UI product search, process Express Checkout orders, and prepare data for Storefront Reports. In this step you must set profile options for iStore Concurrent Programs Responsibility and grant this responsibility to at least one user. You can also schedule concurrent programs.

3. Set up the guest user account. Required.

You must create this account before any user can view your online stores. When an unregistered or anonymous user comes to your online store, Oracle iStore 11*i* automatically logs the user in with the guest user name. If you do not create a guest user account, customers will be unable to view or register in your stores, and the Oracle iStore 11*i* system administrator will have to create a user name for each customer before the customer can access the stores.

4. Launch the Merchant UI. Required.

You will perform most of your Oracle iStore 11*i* implementation and administration tasks in the Merchant UI.

5. Create a specialty store. Required.

When you create a specialty store in the Merchant UI's Setup tab, you include the following specifications:

- Store name, code, description, and active dates
- Supported languages and default language
- Whether the store is ATP enabled, allows walk-in (anonymous and unregistered) users, and checks the user's responsibility before granting access
- The store's root section in the hierarchy (which can be modified later)
- Supported customer user responsibilities, their display names in the specialty stores page, and the active dates for supporting the responsibilities
- Access restrictions by customer organization
- Supported currencies and default currency

- Specialty store price lists for walk-in, registered B2C users, and registered B2B users

6. Customize multimedia. Optional.

Create proprietary media source files for use in the customized store. Some examples of media file types are small GIF, large GIF, descriptive text, audio, and video. The types of media you can use in the store depend on the capabilities of the browsers that will access it.

Catalog Oracle iStore 11i multimedia in the Merchant UI's Multimedia tab to make them available for assignment to multimedia components. Each multimedia name cataloged can have a number of media source files assigned to it.

7. Define multimedia components. Optional.

Define and catalog multimedia components under **Multimedia Components** in the Merchant UI's Setup tab. Enter a default multimedia name for each multimedia component.

8. Customize templates. Optional.

Create template source files for pages and for blocks within pages using Oracle JDeveloper or another Web page authoring application.

Catalog Oracle iStore 11i templates in the Merchant UI's Template tab. Each template name cataloged can have a number of template source files assigned to it.

9. Define display styles. Optional.

Define and catalog the display styles determined during planning, under **Display Styles** in the Merchant UI's Setup tab. Enter a default template name for each display style.

10. Create the hierarchy. Required.

Set up an overall hierarchy for the store sections and products in the Merchant UI's Hierarchy tab. If necessary, you can later modify the hierarchy. For example, you can add items to a section, remove items from a section, create or delete sections, and change the section defaults for multimedia and templates.

11. Build the product catalog. Required.

When you build the product catalog in the Merchant UI's Product tab, you can choose to publish or unpublish Oracle Inventory items in your stores. You can add or remove items from hierarchy sections and specialty stores. You can also

modify the presentation of the item by choosing templates for supported display styles and multimedia for supported multimedia components.

12. Create product relationships. Optional.

Create new relationship types in the Merchant UI's Relationship tab if you do not want to use any of the seeded relationship types.

You can use relationships to sell additional related products to users when they select a product. Create relationships in the Merchant UI's Relationship tab between products, categories, and sections, using the seeded relationship types or any relationship types that you created. If you use any relationship type other than RELATED, you must customize the storefront JSPs by passing in the relationship code to the Java API `oracle.apps.ibe.catalog.Item.getRelatedItems()`, which retrieves related items that have that relationship to the original item.

13. Customize category-level product presentation. Optional.

Customize product presentation at the Oracle Inventory category level in the Merchant UI's Category tab. If there are no item-level settings for display styles or multimedia components in the Product tab, Oracle iStore 11i checks for the category-level settings and uses them to display the product if they exist.

14. Customize item-level product presentation. Optional.

Customize product presentation at the item level. You can do so by choosing settings for multimedia components and display styles in the Merchant UI's Product tab when building the product catalog. Item-level multimedia component and display style settings override category-level and store-level settings. You can also add item descriptive flexfields.

15. Set up the product search. Required.

Set up a product search for the Customer UI. You can set up a category-based or section-based product search. You can also enable fuzzy search and synonym search functionality in the product search.

16. Customize the shopping cart. Optional.

Customize shopping cart presentation and functionality. You can customize shopping cart page bin content, enable unit of measure (UOM) conversions, allow decimal quantities for items, and specify flexfields in the checkout page.

17. Set up notifications. Required.

Oracle iStore 11i e-mail notifications are triggered by specific user and application events. The notifications give relevant information and instructions to the recipients. You can configure notifications in the Merchant UI's Setup tab.

Even if you choose not to use notifications in your stores, you must still perform this step to disable the notifications.

18. Set up Storefront Reports. Required.

Storefront Reports present key business and transaction information to store managers in a concise format. You must set up the Storefront Reports before they can be viewed in the Merchant UI or in another Oracle CRM application.

19. Create B2B user roles. Optional.

If the seeded B2B user roles do not match your business needs, you can create additional B2B user roles with different combinations of the seeded Oracle iStore 11*i* permissions.

20. Set up customer user registration. Required.

You can choose whether to allow B2B or B2C registration, or both. You must set the default responsibilities that are assigned to B2B and B2C users upon registration. For B2B users, you must also set the default role that is assigned to them upon registration.

21. Set profile options for the Oracle iStore 11*i* Customer UI. Required.

You must set certain profile options to configure the Customer UI's appearance and functionality.

22. Test the Oracle iStore 11*i* Customer UI. Required.

You should verify that the Customer UI works correctly before launching your specialty stores. If you modify the hierarchy or product catalog after you launch your stores, you can also use the Preview functionality to view your changes in the Customer UI before you publish the changes in your stores.

23. Manage the cache. Optional.

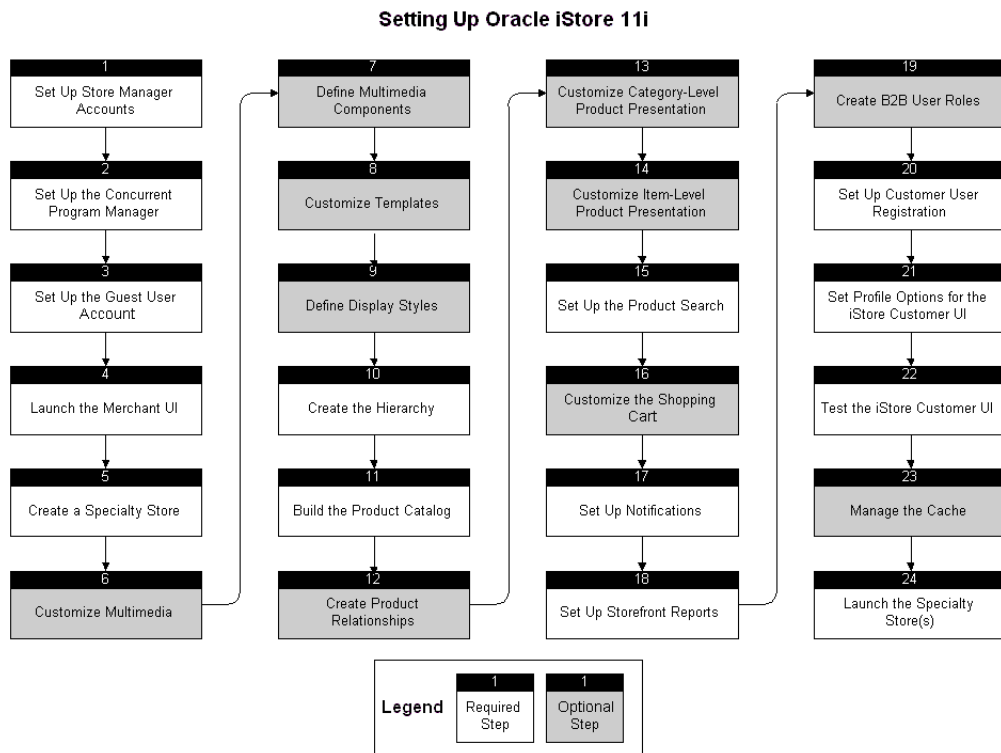
Oracle iStore 11*i* caches section and product information. If you make changes to sections and products, you can clear the cache without restarting the Apache server by using the cache management feature in the Merchant UI's Cache tab.

24. Launch the specialty stores. Required.

4.2 Implementation Task Sequence

The following figure illustrates the process flow for setting up stores in Oracle iStore 11*i*. You must perform the required steps. You need to perform the optional steps only if you plan to use the related features or complete certain business functions.

Figure 4–1 Oracle iStore 11*i* Setup Process Flow



The following table lists the Oracle iStore 11*i* setup steps. You can return to any step number to modify your initial setup in that step. You can also perform any optional step after you have completed all required steps.

Table 4–1 Oracle iStore 11i Setup Checklist

Step	Required/Optional	Reference
1. Set Up Store Manager Accounts	Required	Section 5.1, "Setting Up Store Manager User Accounts"
2. Set Up the Concurrent Program Manager	Required	Section 5.2, "Setting Up the Concurrent Program Manager"
3. Set Up the Guest User Account	Required	Section 5.3, "Setting Up the Guest User Account"
4. Launch the Merchant UI	Required	Section 5.4, "Launching the Merchant UI"
5. Create a Specialty Store*	Required	Section 5.5, "Creating Specialty Stores"
6. Customize Multimedia	Optional	Section 6.1, "Customizing Multimedia"
7. Define Multimedia Components	Optional	Section 6.2, "Defining Multimedia Components"
8. Customize Templates	Optional	Section 6.3, "Customizing Templates"
9. Define Display Styles	Optional	Section 6.4, "Defining Display Styles"
10. Create the Hierarchy*	Required	Section 5.6, "Creating the Hierarchy"
11. Build the Product Catalog*	Required	Section 5.7, "Building the Product Catalog"
12. Create Product Relationships	Optional	Section 6.5, "Creating Product Relationships"
13. Customize Category-Level Product Presentation	Optional	Section 6.6, "Customizing Product Presentation at the Category Level"
14. Customize Item-Level Product Presentation	Optional	Section 6.7, "Customizing Product Presentation at the Item Level"
15. Set Up the Product Search	Required	Section 5.8, "Setting Up the Product Search"
16. Customize the Shopping Cart	Optional	Section 6.8, "Customizing the Shopping Cart"
17. Set Up Notifications	Required	Section 5.9, "Setting Up Notifications"
18. Set Up Storefront Reports	Required	Section 5.10, "Setting Up Storefront Reports"
19. Create B2B User Roles	Optional	Section 6.9, "Creating B2B User Roles"
20. Set Up Customer User Registration	Required	Section 5.11, "Setting Up Oracle iStore 11i Customer User Registration"

* You can perform the required steps Create a Specialty Store, Create the Hierarchy, and Build the Product Catalog in any sequence relative to each other. For example, you can create the hierarchy first, then build the product catalog and create specialty stores.

Table 4–1 Oracle iStore 11i Setup Checklist (Cont.)

Step	Required/Optional	Reference
21. Set Profile Options for the iStore Customer UI	Required	Section 5.12, "Setting Profile Options for the Customer UI"
22. Test the iStore Customer UI	Required	Chapter 7, "Verifying the Implementation"
23. Manage the Cache	Optional	Section 6.10, "Managing the Cache"
24. Launch the Specialty Store(s)	Required	None

* You can perform the required steps Create a Specialty Store, Create the Hierarchy, and Build the Product Catalog in any sequence relative to each other. For example, you can create the hierarchy first, then build the product catalog and create specialty stores.

Required Implementation Tasks

This chapter describes the tasks required to set up Oracle iStore 11*i* after you have verified your installation and dependency setup. Topics include:

- [Setting Up Store Manager User Accounts](#)
- [Setting Up the Concurrent Program Manager](#)
- [Setting Up the Guest User Account](#)
- [Launching the Merchant UI](#)
- [Creating Specialty Stores](#)
- [Creating the Hierarchy](#)
- [Building the Product Catalog](#)
- [Setting Up the Product Search](#)
- [Setting Up Notifications](#)
- [Setting Up Storefront Reports](#)
- [Setting Up Oracle iStore 11*i* Customer User Registration](#)
- [Setting Profile Options for the Customer UI](#)

Note: When using the Oracle iStore 11*i* Merchant UI, ensure that cookies are enabled for your browser. See the relevant browser documentation for information on enabling cookies.

5.1 Setting Up Store Manager User Accounts

An Oracle iStore 11*i* store manager performs tasks in the Merchant UI. To do this, the store manager must have a user name with the IBE_ADMINISTRATOR responsibility. When the store manager logs in to the Oracle CRM Applications login page at:

```
http://<host>:<apache port>/OA_HTML/jtflogin.jsp
```

with this user name, the Oracle iStore 11*i* Merchant UI opens.

The IBE_ADMINISTRATOR responsibility is seeded in Oracle iStore 11*i*. The user receives all the required menus and privileges to manage the store through this responsibility. The menu assigned to this responsibility is called iStore Admin Root (IBE_ADMIN_MENU).

For a multiple operating unit environment, you can create additional store manager responsibilities that have the iStore Admin Root menu. You can then assign each responsibility to manage a different Inventory Organization by setting the profile option IBE: Item Validation Organization at responsibility level.

When creating a store manager user account, you must assign the IBE_ADMINISTRATOR responsibility or another store manager responsibility as the default responsibility for the user.

If you need to modify the functions that the user can perform, create a new responsibility for the user in the Application Object Library (AOL) module. For the new responsibility you can assign the default menu (IBE_ADMIN_MENU) and still remove access to some of the tabs ("functions" in AOL terminology), or you can create a new menu using the Oracle iStore 11*i* functions. All Oracle iStore 11*i* functions can be found by searching for IBE_% in the Form Functions window.

See *Oracle Applications System Administrator's Guide* for more information on creating users, managing responsibilities, and building menus.

Use the following procedure to set up a user account for an Oracle iStore 11*i* store manager.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Security > User > Define**.
The Users window opens.
3. In the User Name field, enter the user name that the store manager will use to log in to the Oracle iStore 11i Merchant UI.
4. In the Password field, enter the store manager's password.
5. In the Responsibilities block, choose **IBE_ADMINISTRATOR** or another store manager responsibility from a Responsibility LOV.
6. Save the user record.
7. Set the following profile options at the user level for this store manager:
 - JTF_PROFILE_DEFAULT_APPLICATION
 - JTF_PROFILE_DEFAULT_RESPONSIBILITYSee [Section A.4.2, "JTT Profile Options for Store Manager User Accounts"](#) for profile option descriptions and values.

5.2 Setting Up the Concurrent Program Manager

You must set up at least one user with the seeded responsibility iStore Concurrent Programs Responsibility. This user is the concurrent program manager, who is responsible for scheduling and running Oracle iStore 11i's concurrent programs. All Oracle iStore 11i concurrent programs are run in Oracle Forms. The same user can be both the concurrent program manager and a store manager.

5.2.1 Oracle iStore 11i Concurrent Programs

In Oracle iStore 11i, there are six concurrent jobs seeded in the Oracle Forms concurrent program manager request setup:

- [iStore Search Insert](#)
- [iStore Section Search Refresh](#)
- [iStore - Express Checkout Order Submission](#)

- [iStore Reports Fact Tables Refresh](#)
- [iStore Reports Materialized Views Refresh](#)
- [iStore Alert Reports](#)

Run the concurrent jobs [iStore Reports Fact Tables Refresh](#), [iStore Reports Materialized Views Refresh](#), and [iStore Alert Reports](#) together, using the request sets [iStore Reports Complete Data Refresh Set](#) and [iStore Reports Increment Data Refresh Set](#).

iStore Search Insert

This is a single request concurrent program that you execute once in the initial setup of Oracle iStore 11*i* as a post-install step. Run this batch job after you have loaded Oracle Inventory items and set the Inventory Organizations. This program populates Oracle iStore 11*i*'s category search table with product information from the Oracle Inventory tables.

Typically, you should not run the iStore Search Insert concurrent program more than once. You may need to rerun this program under one of the following three conditions:

- If you add multiple items that do not appear in the search table
- If you want to purge all items from the search table
- If you change the setting of the fuzzy search functionality, by either enabling or disabling it

iStore Section Search Refresh

This concurrent program populates Oracle iStore 11*i*'s section search table with product information. Run this program after running iStore Search Insert to switch from category-level to section-level search on the Customer UI. Rerun iStore Section Search Refresh to update the section search table whenever you modify the Oracle iStore 11*i* hierarchy.

If you have enabled a section-level search, rerun this concurrent program whenever you change the setting of the fuzzy search functionality.

iStore - Express Checkout Order Submission

Schedule this program as a batch process that runs at pre-determined intervals. This program converts the Express Checkout shopping carts into orders. The profile option IBE: Express Checkout Consolidation Time Interval specifies the time

interval in which Express Checkout shopping carts are converted into orders by this concurrent program batch job.

iStore Reports Fact Tables Refresh

This concurrent program populates Storefront Reports fact tables with data within a user-specified time period from Oracle Order Capture and Oracle Order Management data tables. The Storefront Reports are run against the data pulled by this concurrent program, as represented in materialized views of the fact tables.

iStore Reports Materialized Views Refresh

This concurrent program creates materialized views of the Storefront Reports fact tables that are populated by the concurrent program iStore Reports Fact Tables Refresh. The queries for the Storefront Reports are run against these materialized views. This architecture enhances report query performance and ensures that the reports are always available in the Merchant UI.

iStore Alert Reports

This concurrent program triggers the delivery of the updated Top N Orders Report and the Historical Summary Report as e-mail notifications.

iStore Reports Complete Data Refresh Set

This request set contains the concurrent programs iStore Reports Fact Tables Refresh and iStore Reports Materialized Views Refresh, which are necessary to update data for the Storefront Reports. The iStore Reports Complete Data Refresh Set runs these concurrent programs in Complete mode. The request set also contains the concurrent program iStore Alert Reports, which triggers the Storefront Reports e-mail notifications.

Run this request set when you want to change the parameters specifying the data that is available to the Storefront Reports, when the data within your previously specified parameters has changed since you last ran the program, and when you need to update the Storefront Reports materialized views to reflect data changes in the Storefront Reports fact tables.

It is recommended that you schedule this concurrent program set to run at regularly scheduled intervals. Otherwise, you may need to rerun it every time you want to refresh the Storefront Reports data.

iStore Reports Increment Data Refresh Set

This request set contains the concurrent programs iStore Reports Fact Tables Refresh and iStore Reports Materialized Views Refresh, which are necessary to update Storefront Reports fact tables and materialized views with data for the time since the last data refresh. The iStore Reports Increment Data Refresh Set runs these concurrent programs in Increment mode instead of Complete mode. The request set also contains the concurrent program iStore Alert Reports, which triggers the Storefront Reports e-mail notifications.

Run this request set when you want to add data to the Storefront Reports fact tables and materialized views only for the time period between the last data refresh and your new desired end date.

It is recommended that you schedule this concurrent program set to run at regularly scheduled intervals. Otherwise, you may need to rerun it every time you want to refresh the Storefront Reports data.

5.2.2 Setting Concurrent Program Manager Profile Options

Set the following profile options at the responsibility level for iStore Concurrent Programs Responsibility:

- ASO: Default Order Type
- ASO: Default Salesrep
- ASO: Validate Salesrep

See [Section A.13, "Concurrent Program Manager Profile Options"](#) for profile option values.

5.2.3 Creating a Concurrent Program Manager

Use the following procedure to set up a user as a concurrent program manager.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Security > User > Define**.
The Users window opens.
3. If you are creating a new user, then perform the following steps:
 - a. In the User Name field, enter the user name that the concurrent program manager will use to log in to Oracle Forms.
 - b. In the Password field, enter the concurrent program manager's password.
4. If you are making an existing user the concurrent program manager, then perform the following steps:
 - a. Choose **View > Find**.
 - b. Search for the existing user, and select that user name.
5. In the Responsibilities block, choose **iStore Concurrent Programs Responsibility** from a Responsibility LOV.
6. Save the user record.

5.2.4 Scheduling Concurrent Programs

You should schedule the concurrent program iStore - Express Checkout Order Submission and the concurrent program sets iStore Reports Complete Data Refresh Set and iStore Reports Increment Data Refresh Set to run regularly at pre-determined intervals. You can schedule these concurrent programs now or later in your implementation. You can also run these concurrent programs only upon specific request.

See [Section 5.10.4, "Preparing Data for Storefront Reports"](#) for instructions on running and scheduling the concurrent program sets iStore Reports Complete Data Refresh Set and iStore Reports Increment Data Refresh Set.

Use the following procedure to run or schedule the iStore - Express Checkout Order Submission concurrent program.

Login

Log in to Oracle Forms as the concurrent program manager.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

None

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs Responsibility.
The Submit a New Request window opens.
2. Choose **Single Request** and click **OK**.
The Submit Request window opens.
3. Choose **iStore - Express Checkout Order Submission** from the Name LOV.
4. Set how often and when you want to run this by clicking **Schedule** in the "Submit Request" window.
 - To run right away, select **As Soon as Possible** and click **OK**.
 - To run once at a scheduled time, click **Once**, enter information in the appropriate fields, and click **OK**.
 - To run regularly, click **Periodically** or **On Specific Days**, enter information in the appropriate fields, and click **OK**.
5. Click **Submit** to submit the request. You receive a confirmation that the request has been submitted.

5.2.5 Checking Concurrent Program Status

Use the following procedure to check the status of the concurrent program iStore - Express Checkout Order Submission.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Concurrent > Requests**.
The Find Requests window (defaulted to "All My Requests") opens.
3. In the Find Requests window, search for your concurrent program request.
 - If the server is not busy, then clicking **Find** may be the fastest way to find your request.
 - If your server is busy, it may be better to enter search criteria and look for "Specific Requests."
4. The "Requests" window displays a list of submitted requests. There should be one (or more) entitled "iStore - Express Checkout Order Submission." Initially, you may find this in the "green" state with Phase = "pending" or "running."
5. Click **Refresh Data** occasionally to check the completion status.
6. Once in the "red" state or Phase = "Completed," the "View Output" and "View Log" buttons will become active if the log and output files have been setup correctly. Use these buttons to find out how many orders the concurrent program was able to submit successfully and how many failed.

5.3 Setting Up the Guest User Account

If you want guest users to be able to browse your Web stores, you must define a guest user name, assign a responsibility to it, and set up profile options. Anonymous users who visit your Web stores are then automatically logged in with the guest user name.

If a guest user makes any changes, such as modifying the preferred language or currency, or adding items to the shopping cart, the changes are saved in the cookie so that two anonymous users cannot see each other's changes.

You must set up the guest user account before customers can view your Web stores' home page. If you do not set up the guest user account, customers will be unable to view or register in your Web stores, and the Oracle iStore 11i system administrator will have to create a user name for each customer before the customer can access the stores.

5.3.1 Creating the Guest User

Use the following procedure to create the Oracle iStore 11i guest user account.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Security > User > Define**.
The Users window opens.
3. In the User Name field, enter a user name, such as `IBEGUEST`, by which a guest user will be automatically logged in to Oracle iStore 11i.
4. In the Password field, enter a password for this user name.

5. In the Responsibilities block, choose an Oracle iStore 11i customer responsibility, such as **IBE_CUSTOMER**, from the Responsibility LOV.
6. Save the user record.
7. Set the following profile options at the user level for the guest user name:
 - JTF_PROFILE_DEFAULT_APPLICATION
 - JTF_PROFILE_DEFAULT_CURRENCY
 - JTF_PROFILE_DEFAULT_RESPONSIBILITYSee [Section A.4.3, "JTT Profile Options for the Guest User Account"](#) for profile option descriptions and values.
8. Set up this guest user account as the Oracle CRM Technology Foundation self-service user. See *Oracle CRM Technology Foundation Concepts and Procedures* for instructions.

5.3.2 Verifying the Guest User Account

Use the following procedure to verify that you have set up the guest user account correctly.

Login

Open the Oracle iStore 11i Customer UI at the URL:

```
http://<host>:<apache port>/OA_HTML/ibeCZzdMinisites.jsp
```

Responsibility

Guest user responsibility (e.g., IBE_CUSTOMER). You are automatically logged in as the guest user.

Prerequisites

You have set up the guest user account as described in [Section 5.3.1, "Creating the Guest User"](#).

Steps

1. Log out of any Oracle applications with which you have been working.
2. Restart the Apache server.
3. Navigate to the URL:

`http://<host>:<apache port>/OA_HTML/ibeCZzdMinisites.jsp`

The page that opens should have a list of the specialty stores that are accessible to guest users.

5.4 Launching the Merchant UI

After installing Oracle iStore 11*i* and setting up the Merchant UI as detailed in [Chapter 3](#), you can enter the Merchant UI by logging in to:

`http://<host>:<apache port>/OA_HTML/jtfllogin.jsp`

with a user name that the system administrator has set up as an Oracle iStore 11*i* store manager user account. See [Section 5.1, "Setting Up Store Manager User Accounts"](#) for more information on creating a store manager user account.

Verify that cookies are enabled for your browser before accessing the Merchant UI.

On any page of the Merchant UI, you can click the Profile icon to go to your Oracle CRM Technology Foundation user profile page. Here, you can switch responsibilities and update your profile.

Figure 5–1 The Oracle iStore 11i Merchant UI



5.5 Creating Specialty Stores

A specialty store is any Web store. You can create multiple stores, for example a main store, a store for one large customer, a holiday specials store, and a store that requires registered users. You must create at least one store.

Multiple currencies and languages can be selected for every specialty store. The customer's preference, as defined in his or her user profile, determines which currency and language is to be used for a store. Once a registered customer selects a preferred language, the store defaults to that preferred language each time the customer enters. When the user preference is not set, default language and currency settings will take effect.

Users can also change their display languages and currencies by choosing from a list of the languages and currencies supported by the store. When a customer changes the display language and currency, Oracle iStore 11i changes his or her preferred language and currency to match the newly selected display language and currency. This change enables consistency across customer sessions and Oracle applications. For example, this will ensure that the order confirmation alert in a

German language store will be in German, even if the customer's previous preferred language was French.

Customers must also choose the responsibility with which they enter a specialty store. The Customer UI shows a list of available combinations of specialty stores and Oracle iStore 11i responsibilities. When the customer chooses one of these combinations, he or she enters that specialty store with that responsibility for the current session. The responsibility determines the operating unit against which any orders placed in the current session are booked. The responsibility also determines the values of the profile options set at the responsibility level.

You can set up specialty stores to check the customers' responsibilities when they log in. For every specialty store flagged to check the user's responsibility, the Customer UI excludes those specialty store-responsibility combinations containing responsibilities not associated with the user.

Note: If the customer can only access one specialty store-responsibility combination, he or she is automatically forwarded to that specialty store's home page with that responsibility and does not see a list of specialty store-responsibility combinations.

Use Oracle Forms to create responsibilities and assign them to customer user names. See *Oracle Applications System Administrator's Guide* for more information.

Use the following procedure to create a specialty store.

Note: Specialty stores are also referred to as "minisites."

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. In the Setup tab, choose **Specialty Stores**.
3. Click **Create**. The Specialty Store Detail page opens.
4. Enter the basic information for the specialty store in the following fields. The fields marked with an asterisk in the Merchant UI are mandatory.
 - a. Specialty Store Name: Enter the name of the specialty store.
 - b. Specialty Store Code: Enter a unique programmatic access name for the specialty store. Oracle iStore 11i's JSPs and Java code will use this programmatic access name to retrieve the specialty store information. The specialty store code should be an alphanumeric string without spaces.
 - c. Description: Enter a description for the specialty store.
 - d. Start Date: Enter the date when the specialty store should first be active and available to customers.
 - e. End Date: Enter the date when the specialty store should no longer be active and available to customers.
5. In the Languages section, check the Select checkbox next to each language that you want the specialty store to support.
6. In the Default Language pull-down menu, choose the default language for your specialty store.
7. Click **Continue**. The Store Flags page opens.

This page is used to select the root section for the specialty store from the Oracle iStore 11i hierarchy and to determine whether the specialty store will:

 - Be ATP Enabled for Oracle Inventory
 - Allow walk-in customers (customers who have not logged in or registered)
 - Check user responsibility
8. From the ATP Enabled pull-down menu, choose **Yes** if you want this store to provide ATP inventory information to the customer.
9. From the Walkin Customers Enabled pull-down menu, choose **Yes** if you want this store to allow walk-in customers who are not registered or logged in.
10. From the Check User Responsibility pull-down menu, choose **Yes** if you want the store to check user responsibility when customers log in.

11. Click **Go** next to the Root Section field.

A pop-up window displays the Oracle iStore 11i hierarchy.

12. Search for and highlight the root section of the store, and click **Done**.

The pop-up window closes, and the Root Section field is populated with the name of the section you have chosen.

Note: Each specialty store must have a root section.

13. Click **Continue**.

The Supported Responsibilities page opens.

14. Click **Add Responsibility**.

The Select Responsibility pop-up window opens.

15. In the Select Responsibility pop-up window, search for responsibilities that you want this specialty store to support by application and responsibility name, key, or description, using the wildcard character % if necessary. Check the Select checkbox next to the responsibilities, and click **Add**. When you are finished selecting responsibilities, click **Done**.

You return to the Supported Responsibilities page.

16. In the Display Name fields, enter user-friendly names by which each specialty store-responsibility combination will appear in the Customer UI.
17. In the Start Date and End Date fields, enter the dates when the specialty store will support each responsibility you have added.
18. In the Order fields, specify the order in which these responsibilities will appear on the customer login page.
19. Click **Continue**.

The Access Restrictions page opens.

20. Click **Add Organization**.

The Select Organization pop-up window opens.

21. In the Select Organization pop-up window, search for organizations by name or account number, using the wildcard character % if necessary. Check the Select checkbox next to the organizations you want to add to the list, and click **Add**. When you are finished selecting organizations, click **Done**.

You return to the Access Restrictions page.

22. Highlight one of the three radio buttons:
 - No Restriction, if you want this specialty store to allow users from any organization
 - Include the following organizations, if you want this specialty store to allow only users from the organizations you specify in this page
 - Exclude the following organizations, if you want this specialty store to deny access only to users from the organizations you specify in this page
23. In the Start Date and End Date fields, enter the dates when the inclusion or exclusion of the listed organizations is effective.

24. Click **Continue**.

The Currencies and Price Lists page displays available currencies.

25. Choose currencies by checking the Select checkbox next to the currencies that you want this specialty store to support.
26. For each selected currency, choose the price lists for Walk-in Customer, Registered Customer, and Business Partner from the pull-down menus.
27. Optional: Enter a maximum orderable limit for each selected currency.
28. Choose the default currency for the store from the Default Currency pull-down menu.
29. Click **Continue**.

The new specialty store is saved.

To modify an existing specialty store, click on its name in the **Setup > Specialty Stores** section of the Merchant UI and change the information as needed. Click on **Update** instead of **Continue** in the specialty store information pages to save your changes.

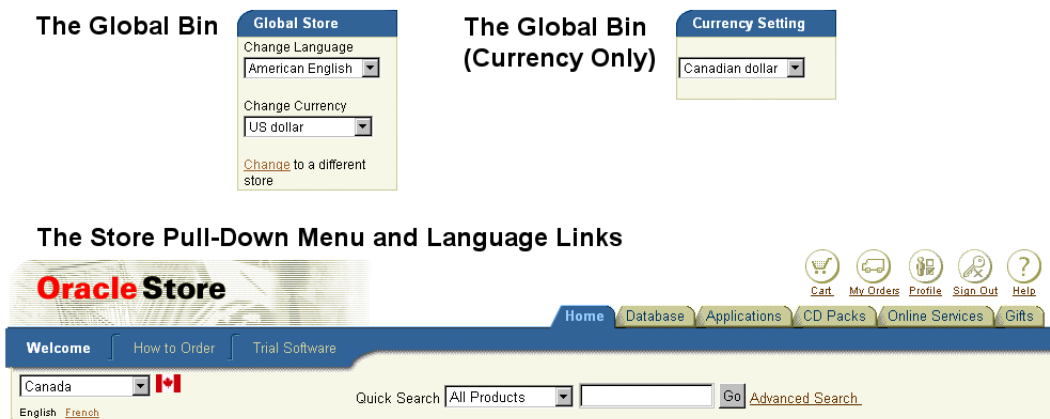
5.5.1 Creating Global Specialty Stores

If you have created specialty stores that support multiple languages and currencies, you can set up the stores' home pages to allow the user to change his or her preferred language and currency. The store home page is the highest level featured section of the catalog.

In the store home page, you can set up different UI objects where the user can change his or her preferred language and currency, as well as the specialty store. The UI objects are the following items:

- **The global bin**—This bin appears by default on the right side of the home page. The global bin displays pull-down menus in which the user can choose the preferred language and currency. It also displays a link to the specialty stores login page, where the user can choose another specialty store.
- **The global bin for currency only**—This bin is the same as the standard global bin, but displays only a currency pull-down menu.
- **Store pull-down menu and language links**—The home page menu bar can display a specialty store pull-down menu and links for the current store’s supported languages. The menu bar can also display a thumbnail image representing the current store next to the specialty store pull-down menu. The user can choose a new specialty store directly from the pull-down menu and change the preferred language by clicking a link.

Figure 5–2 UI Objects for the Global Store Home Page



Using the seeded Oracle iStore 11i page layouts, you can combine these UI objects in one of the scenarios described in the following table.

Table 5–1 Global Store Home Page Layouts

Global Bin	Global Bin (Currency Only)	Store Menu and Language Links	Procedure
Yes (Appears in all seeded section pages)	No	No	Set the profile option IBE: Use Global Bin to Yes and the profile option IBE: Use Specialty Stores Page to Yes . Additionally, if you want to remove the link to the specialty stores login page from the global bin, set the profile option IBE: Show Change Store Link to No .
No	Yes (Appears in all seeded section pages)	Yes	Set the profile option IBE: Use Global Bin to Yes and the profile option IBE: Use Specialty Stores Page to No . For the thumbnail image representing the current specialty store, map image files to the multimedia programmatic access name STORE_LOGO_SPECIALTY for each specialty store. See Section 6.1.3, "Cataloging Multimedia" for information on mapping image files to multimedia programmatic access names.
No	No	Yes	Set the profile option IBE: Use Global Bin to No and the profile option IBE: Use Specialty Stores Page to No . For the thumbnail image representing the current specialty store, map image files to the multimedia programmatic access name STORE_LOGO_SPECIALTY for each specialty store.
No	No	No	Set the profile option IBE: Use Global Bin to No and the profile option IBE: Use Specialty Stores Page to Yes .

The profile option IBE: Use Global Bin activates the global bin if the profile option is set to **Yes**. The profile option IBE: Use Specialty Stores Page, if set to **Yes**, adds the specialty stores login page link to the global bin. If this profile option is set to **No**, it converts the global bin into the currency-only global bin. It also adds the store pull-down menu and the language links if multiple specialty stores exist and multiple languages are supported.

You can move the global bin by setting the profile option IBE: Use Global Bin to **No** and mapping the global bin JSP to a catalog bin template, as described in *Oracle iStore Concepts and Procedures*.

Note: The store pull-down menu displays every specialty store that you have created. Therefore, if you have set up any form of access control for your specialty stores, you must use the specialty stores login page instead of the store pull-down menu. Set the profile option IBE: Use Specialty Stores Page to **Yes**.

The following table summarizes the recommended values for the profile options IBE: Use Global Bin and IBE: Use Specialty Stores Page for various store and globalization scenarios.

Table 5–2 Recommended Values for Global Store Profile Options

Scenario	IBE: Use Global Bin	IBE: Use Specialty Stores Page
One specialty store with one language and currency	No	Not applicable
One specialty store with multiple languages and currencies	Yes	No
Multiple specialty stores with access control	Yes	Yes
Multiple specialty stores without access control	Yes	Yes to require the user to return to the specialty stores page to change stores, or No to activate the store pull-down menu and language links
	No	Yes to prevent store switching completely, or No to activate the store pull-down menu and language links

See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more information about setting these profile options. You must also specify the permitted bill-to and ship-to countries for each of your operating units in Oracle Human Resources, as described in [Section 3.1.7, "Setting Up Oracle Human Resources"](#).

In addition to supporting multiple languages and currencies, your specialty stores can also display line level taxes if one or more of the countries in which you are a merchant require line level tax display. To set up line level tax display for a specialty store, map the template with the programmatic access name STORE_CART_LINE_TAX to a JSP that displays line level taxes. Set this mapping for the specialty store and all languages. See [Section 6.3.3, "Cataloging Templates"](#) for information on mapping JSP files to template programmatic access names.

5.6 Creating the Hierarchy

After saving the specialty store, you must define an overall hierarchy in the Oracle iStore 11i Merchant UI Hierarchy tab. This hierarchy determines the organization of your specialty stores and their sections and products in the Merchant UI. It also determines the organization and presentation of each store's sections and products in the Customer UI. All the specialty stores you create will be based in the overall hierarchy you created when setting up your initial specialty store.

The overall hierarchy contains products from Oracle Inventory, grouped into sections. Associate a specialty store to a portion of the overall hierarchy or to the whole hierarchy itself by setting up its root node to point to a section. When reorganizing store sections and products or adding new specialty stores, you need to modify the overall hierarchy.

The hierarchy determines the browsing experience of the customer and what products are featured at different levels in the store. When users come to a specialty store, they see the hierarchy starting from the root node of the store. You can choose not to show a particular section in a specialty store even though the given specialty store might point to an ancestor of the section.

Set up the top level sections in the hierarchy first. For each top level section, create as many subsections or children as you wish. The levels of sections are driven by the design.

You can assign products to sections of the hierarchy from the Hierarchy or Product tabs. Similarly, you can create groups of featured products at any level in the hierarchy by creating a subsection of type Featured in that section. The products in a section are shown by using the display style that you specify for that section.

Note: In the Customer UI for Oracle iStore 11i, the minisite root sections are treated as virtual roots. The current minisite's root section will not appear in the menu tabs or the navigational hierarchy of the Customer UI. The minisite's home page will display the first navigational subsection under the root section, not the root section page itself. To present featured sections on the minisite's home page, make them subsections of this navigational subsection.

Your template design determines how to manifest the hierarchy for the user. You can create and revise new templates at any time.

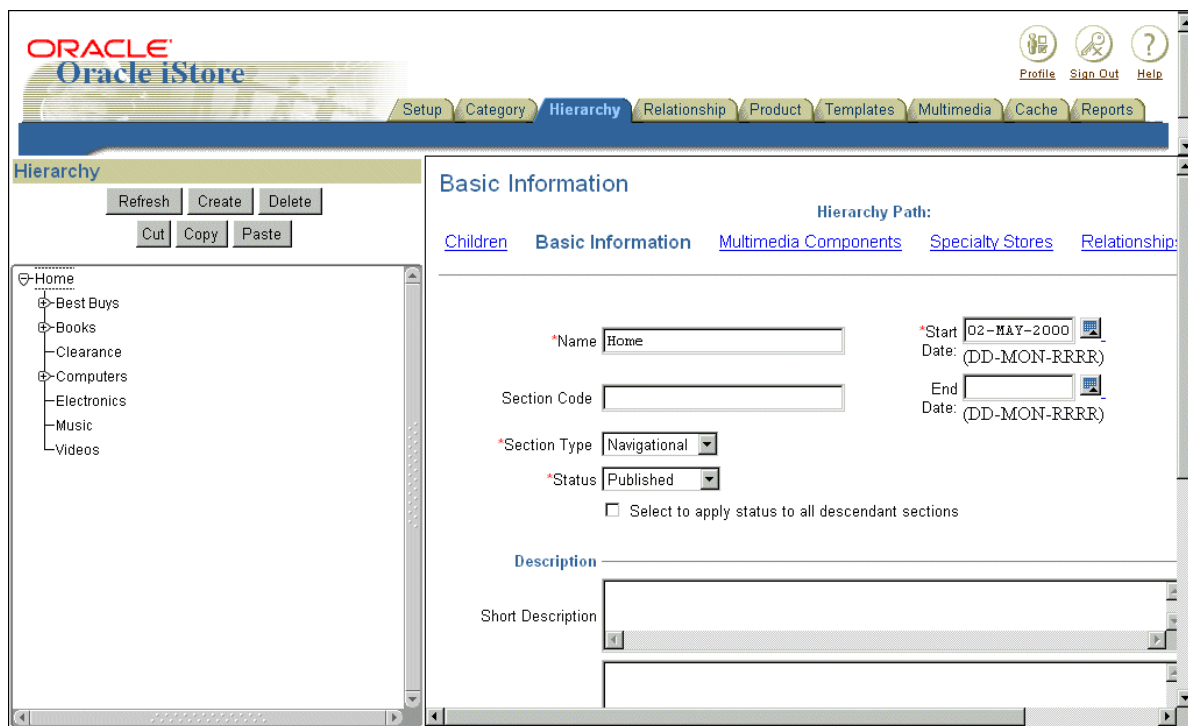
In the templates shipped with Oracle iStore 11*i*, the top level appears as tabs while the lower level appears as browse bins on the store pages. A section containing subsections shows the featured products in the middle and the subsections in the left browse bin. If a section contains only products, it lists the products in the middle. Featured sections cannot have subsections.

While working with the hierarchy, you can determine whether or not to publish sections. A published section is available in the Customer UI. An unpublished section is not available in the Customer UI, unless the user has the IBE_ADMINISTRATOR responsibility. Thus, you can choose to keep a section unpublished until you have tested its appearance in the Customer UI.

You can also specify whether the descendant sections have the same published/unpublished status as the section on which you are currently working. If a section is unpublished, its descendant sections are effectively unpublished, since a user cannot navigate to the descendant sections in the Customer UI (unless he or she has the IBE_ADMINISTRATOR responsibility). However, if a user knows the exact URL to access a descendant section, the user can access the descendant section if it is published.

If any section is not published, a user lacking the IBE_ADMINISTRATOR responsibility cannot access the section even if he or she has the exact URL.

Figure 5–3 The Oracle iStore 11i Merchant UI Hierarchy Tab



5.6.1 Creating a Section in the Hierarchy

Use the following procedure to create a section in the hierarchy.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

You have set the profile option IBE: Item Validation Organization. See [Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI"](#) for details.

Steps

1. Launch the Merchant UI and enter the Hierarchy tab.
2. In the left frame of the Hierarchy tab window, the overall hierarchy tree appears. In the tree, select the node that will host the node you want to create, and click **Create**.
3. The Basic Information page opens in the right frame of the Hierarchy tab window. Enter the following information:
 - a. **Name:** The name of the section.
 - b. **Section Code:** Optional. Specify a Section Code to use as a name for the section in customized templates. The code in your customized templates can refer to the section and access its information directly by using its Section Code.
 - c. **Section Type:** Select either **Featured** or **Navigational**. A featured section appears on the home page of its parent section. A navigational section appears as a link in the browsing map of its parent section.
 - d. **Status:** Select either **Published** or **Unpublished**.
 - e. **Select to apply status to all descendant sections:** Check this checkbox if you want all descendant sections of this section to have the same status.
 - f. **Start Date Active and End Date Active:** Specify the time limit (if any) when this section will be active.
 - g. **Short Description and Long Description:** Fill these in to describe the section in the store. The descriptions will appear on the section pages.
 - h. **Keywords:** Optional. Enter keywords for the section to enable keyword-based searches for this section.
 - i. **Template for displaying this section:** Optional. Specify a section-level default template for displaying the section. Several sections can share a template. Leave this blank to revert to the default store-level template.

Note: Do not choose a template name that ends with the word "included." These templates display only the center of the section page, not the menu.

- j. Display Style for products in this section: Optional. Select the display style you want to use to display products in this section. Leave this blank to revert to the default store-level display style for products.

Note: If the section is a leaf section, do not choose the display style Product Detail Style.

Click **Continue**. The Multimedia Components page opens.

4. Optional: In the Multimedia Components page, provide information about multimedia components specific for this section. Use this if you want to show or associate multimedia content with sections. For a given component, click **Go** to search the multimedia catalog. If the desired object is not found, create one and associate it with the section.

Leave the fields blank to use the default multimedia for the multimedia components.

Click **Continue**. The Specialty Stores page opens.

5. Move the specialty store(s) in which this section should appear into the Included Specialty Stores column.

Decide if the section should appear only in the specialty stores that you have selected here or in other specialty stores if those specialty stores' roots point to an ancestor of the current section. Check the box **Include in all future sites if the site's root section is ancestor of this section** as appropriate.

Click **Continue**. The Relationships page opens with a list of existing relationships in the section.

6. Review relationship rules for this section. See [Section 6.5, "Creating Product Relationships"](#) for more information.

Click **Continue**. The Advanced Settings page opens.

7. Optional: Specify if the section should be populated automatically with products from Oracle Inventory based on certain SQL clauses, as well as specify the order.

Note: The auto-placement rule is not currently used.

Optional: Specify Order By clause to specify how the product for a section should be ordered when displayed in the Customer UI. The value for this field can be just one column name from MTL_SYSTEM_ITEMS or comma-separated columns of the same table.

Click **Finish**. The Children page opens.

8. Your section has been created. Add products or subsections to this section. Note that a section can have either subsections or products as children, but not both. Featured sections cannot have subsections as children. See [Section 5.6.3, "Adding Products to a Section"](#) and [Section 5.6.4, "Adding Subsections to a Section"](#) for instructions on adding children to a section.
9. Continue to create sections and subsections for your hierarchy as needed.
10. To adjust the order of the section tabs in the specialty store, click its root section in the navigation tree and edit the values in the Order column. The section whose display name should be the first tab should have the lowest number in the Order column.

Guidelines

- The display style you choose for products in this section is the style used to display products on a section page for this section.
- Choosing **Include in all future specialty stores if the store's root section is ancestor of this section** in the Specialty Stores page ties the section to its ancestors. When a specialty store is added to or deleted from the ancestor, the same change applies to all its descendant sections.

Example

1. In the Hierarchy tab, select the **Home** section in the navigation tree in the left frame.
2. In the right frame, click **Children**.
3. Click **Add Section** in the right frame to create a new section.
4. Enter Featured Products as the name and the code.
5. Select **Featured** as the section type. Everything else is optional. Click **Continue**.
6. On the Multimedia Components page, everything is optional. Click **Continue**.
7. Accept the defaults on the Specialty Store and Navigation Relationships pages. Click **Continue**.

The Advanced Settings page opens. Click **Finish**.

8. In the left frame, click **Refresh**. Expand the Home node, which should have the newly-created section under it.
9. Highlight **Home**, and click **Create**. Repeat the above steps to create another section named Books, with type Navigational.
10. Repeat again for Music, Electronics, and Computers, making them all navigational sections.

5.6.2 Modifying a Section in the Hierarchy

Use the following procedure to modify a section in the hierarchy.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

You have set the profile option IBE: Item Validation Organization. See [Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI"](#) for details.

Steps

1. Launch the Merchant UI and enter the Hierarchy tab.
2. In the left frame of the Hierarchy tab page, the overall hierarchy tree appears. In the tree, select the node for the section that you want to modify.

The Children page for the section opens in the right frame of the Hierarchy tab.

3. Optional: In the Children page, add products or subsections to this section. See [Section 5.6.3, "Adding Products to a Section"](#) and [Section 5.6.4, "Adding Subsections to a Section"](#) for instructions on adding children to a section.
4. Optional: Click **Basic Information** to open the Basic Information page. Enter or modify the basic information about the section.

Click **Update** to save your changes.

5. Optional: Click **Multimedia Components** to open the Multimedia Components page. Enter or modify multimedia content associations for this section.

Click **Update** to save your changes.

6. Optional: Click **Specialty Stores** to open the Specialty Stores page. Add or remove this section from eligible specialty stores.

Click **Update** to save your changes.

7. Optional: Click **Relationships** to open the Relationships page. Review the existing relationship rules for this section. See [Section 6.5, "Creating Product Relationships"](#) for more information.

Click **Update** to save your changes.

8. Optional: Click **Advanced Settings** to open the Advanced Settings page. Specify an Order By clause. (The auto-placement rule is not currently used.)

Click **Update** to save your changes.

5.6.3 Adding Products to a Section

You can add products to a section in the Hierarchy tab after building the product catalog. You can also add products to a section when working on the product in the Product tab. See [Section 5.7, "Building the Product Catalog"](#) for more information.

Use the following procedure to add products to a section in the Hierarchy tab.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

The section has no subsections.

Steps

1. Launch the Merchant UI.
2. In the Hierarchy tab, navigate to the section's Children page in one of the following ways:
 - Create a section as described in [Section 5.6.1, "Creating a Section in the Hierarchy"](#). When you finish creating your section, the Children page for the section opens.

-
- In the hierarchy tree, select the node for the section to which you want to add products. The Children page for the section opens.
 - While working on the section as described in [Section 5.6.2, "Modifying a Section in the Hierarchy"](#), click the Children link. The Children page for the section opens.
3. Click **Add Product**.

Note: The **Add Product** button appears only if the section has no subsections.

4. Perform a product search in the pop-up window.
5. Select one or more of the results and click **Add**.
6. Choose **Done** to close the pop-up window and return to the Children page in the Hierarchy tab.
7. Optional: Modify the start date or end date for the time period when a product will be available in the section. Click **Update** to save your changes.
8. Optional: Edit the values in the Order column to specify the order in which the products will be displayed in the section. The first product should have the lowest number in the Order column. Click **Update** to save your changes.
9. Optional: Check the Remove checkbox next to a product and click **Update** to remove the product from the section.

5.6.4 Adding Subsections to a Section

Use the following procedure to add subsections to a section in the Hierarchy tab.

Note: You can also add subsections to a section by moving existing sections into the parent section. See [Section 5.6.5, "Moving Sections in the Hierarchy"](#) for instructions.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- The section has no products.
- The section is not a Featured section.

Steps

1. Launch the Merchant UI.
2. In the Hierarchy tab, navigate to the section's Children page in one of the following ways:
 - Create a section as described in [Section 5.6.1, "Creating a Section in the Hierarchy"](#). When you finish creating your section, the Children page for the section opens.
 - In the hierarchy tree, select the node for the section to which you want to add subsections. The Children page for the section opens.
 - While working on the section as described in [Section 5.6.2, "Modifying a Section in the Hierarchy"](#), click the Children link. The Children page for the section opens.
3. Click **Add Section**. The Basic Information page for the new subsection opens.

Note: The **Add Section** button appears only if the section has no products.

4. Set up the subsection in the Hierarchy tab as described in [Section 5.6.1, "Creating a Section in the Hierarchy"](#).
5. Optional: In the section's Children page, modify the start date or end date for the time period when a subsection will be available in the section. Click **Update** to save your changes.
6. Optional: Edit the values in the Order column to specify the order in which the subsections will be displayed in the section. The first subsection should have the lowest number in the Order column. Click **Update** to save your changes.

Note: To adjust the order of the section tabs in the specialty store, click its root section in the hierarchy tree to open the Children page, and edit the values in the Order column. The section whose display name should be the first tab should have the lowest number in the Order column.

7. Optional: Check the Remove checkbox next to a subsection and click **Update** to remove the subsection from the section.

5.6.5 Moving Sections in the Hierarchy

In the Hierarchy tab, you can move sections around the hierarchy tree by cutting, copying, and pasting them. Use the **Cut**, **Copy**, and **Paste** buttons to move an entire section from one place in the hierarchy to another.

Use the following procedure to cut or copy a section and paste it into another location in the hierarchy tree.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. In the Hierarchy tab's hierarchy tree, highlight the section that you want to move.
3. Click **Cut** to cut the section, or **Copy** to copy the section.
4. Paste the cut or copied section into the hierarchy as follows:
 - a. Highlight the root section that should host the pasted section.
 - b. Click **Paste**.

Note: If you cut and paste a section from one location in the hierarchy to another, all the information about the section will transfer to the new location. If you copy and paste a section, all the information about the original section will copy into the new section, except for the section-level multimedia component settings.

5.7 Building the Product Catalog

Setting up the product catalog involves the following considerations:

- Designing page flow and navigation.
- Determining product items to be sold, their display features, and configuration options.
- Determining types of data required. For example, books may require a title, author, and publisher. See *Oracle Inventory User's Guide* for details on how to use the flexfield structures in Oracle Inventory to store and sort data accordingly.

If you plan to use customized multimedia or templates to display products in your specialty stores, then setting up the product catalog also involves the following considerations:

- Designing the display appearance for different product types. This process determines the number and type of product templates required. For example, perhaps all music products list the artist first and then provide a link to an audio clip, but all clothing products list the clothing type (e.g., jacket) first, followed by a graphic of the item. Oracle iStore 11i ships with the assumption that all product types appear the same on the Customer UI.
- Creating template text for product types. Text embedded in a template makes that template specific to the given product type. For example, the word "Artist" in front of the flexfield where a performer's name is to appear can only be used for the compact disc product category. Embedded text must be manually translated and saved in the required multiple languages as additional template types. Oracle iStore 11i does not translate template text. Alternatively, templates using generic terminology can be more easily applied across product types. For example, using the term "Lead Performer(s)" as a flexfield label could apply to both compact disc and videotape product categories. Providing no flexfield labels in a template allows templates to be most broadly applied across product types.

While working with the product catalog, you can determine whether or not to publish products. A published product is available in the Customer UI, assuming that it is also listed in at least one published section. An unpublished product is not available in the Customer UI, unless the user has the IBE_ADMINISTRATOR responsibility. Thus, you can choose to keep a product unpublished until you have tested its appearance in the Customer UI.

5.7.1 Searching for Products

Use the following procedure to search in the Product tab for Oracle Inventory items that you want to include in the product catalog. After you find an Oracle Inventory item, you can modify its Oracle iStore 11i product catalog information as described in [Section 5.7.2, "Modifying the Product Catalog"](#).

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- Products must be loaded into Oracle Inventory before they can be imported into Oracle iStore 11i.
- Products in Oracle Inventory must have their Web Status flag set to either **Published** or **Unpublished** in the Web Option tab of the Master Item form before they can appear in the Oracle iStore 11i Merchant UI. The Web Status must not be **Disabled** or null. Only products with a Web Status of **Published** can be sold in your stores.
- Products in Oracle Inventory must have a checked Orderable on the Web checkbox in the Web Option tab of the Master Item form.
- Products in Oracle Inventory must have a checked Customer Orders Enabled checkbox in the Order Management tab of the Inventory Master Item form.
- JTT and IBE profile options for the Merchant UI must be set. See [Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI"](#) for details.

Note: Products are retrieved from the Inventory Organization ID that matches the value of the profile option IBE: Item Validation Organization.

Steps

1. Launch the Merchant UI.
2. In the Product tab, choose the field on which you want to search from the View pull-down menu, and enter the search criteria in the adjacent text field. The searchable fields are listed below:
 - **Name**—Retrieves products with an Oracle Inventory description matching the search criteria that you enter
 - **Part number**—Retrieves products with an Oracle Inventory item ID matching the search criteria that you enter
 - **Belongs to category**—Retrieves products in an Oracle Inventory category matching the search criteria that you enter
 - **Created after date**—Retrieves products created in Oracle Inventory after the date that you enter. Use date format DD-MON-RRRR.
 - **Created before date**—Retrieves products created in Oracle Inventory before the date that you enter. Use date format DD-MON-RRRR.
 - **Status**—Retrieves products with an Oracle Inventory Web Status matching the status that you enter. Enter PUBLISHED or UNPUBLISHED.
 - **New**—Retrieves products created in last x days where x is the value of the profile option IBE: Number of Days for New Items

Note: You can use % as a wildcard character in the search.

3. After entering your search criteria, click **Go**.

A list of search results appears in the Products page. The list displays products in Oracle Inventory that match your search criteria, with existing product catalog information for those products.

See [Section 5.7.2, "Modifying the Product Catalog"](#) for instructions on modifying a product's catalog information.

If there are unpublished products in your results, the list shows them with a **Publish** button in the Wizard column. See [Section 5.7.3, "Publishing Products"](#) for instructions on publishing a product.

5.7.2 Modifying the Product Catalog

Use this procedure to add products to the product catalog and make them available for sale in your store. You can also use this procedure to remove products from the store.

Additionally, if you plan to use customized multimedia or templates, you can use this procedure to customize a product's presentation at the item level. For example, defining proprietary multimedia and multimedia components enables association of specific images with certain products. Item-level customizations override category-level, section-level, and store-level settings.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- Store layout must be determined, and the hierarchy of products, sections, and specialty stores must be identified. See [Section 5.6, "Creating the Hierarchy"](#) for details.
- If you plan to use customized multimedia or templates, you must determine store layout with the following additional considerations:
 - Site appearance must be decided.
 - Templates associated with each product, section, and specialty store must be identified.
 - Templates for full Web pages and areas within Web pages must be identified.
 - At the implementation level, the mappings between templates and source files must be decided.

- Source files (physical templates) must be created by the UI implementation team with stubs for the dynamic elements, along with the multimedia components to be displayed on the site.
- Templates must be populated with the dynamic JSP elements calling Oracle iStore 11*i*, using the templates shipped with Oracle iStore 11*i* as a model.
- Display styles must exist before you can assign them to a product. See [Section 6.4, "Defining Display Styles"](#) for more information.

Steps

1. Launch the Merchant UI.
2. Search for products as described in [Section 5.7.1, "Searching for Products"](#).
The search results appear in the Product tab.
3. Click on a product's name in the search results list to edit its information.
The Basic Information page displays the Posting Status, the Oracle Inventory name and part number, and any descriptions you have already added to the product catalog.
4. To make the product available to be sold in your store, set the Posting Status to **Published**. To remove the product from your store, set the Posting Status to **Unpublished**.
5. Optional: In the Basic Information page, enter or modify the short and long descriptions.
6. In the Basic Information page, click **Update**. The product is published or unpublished immediately. The descriptions are saved, and are also available for display in your store if the product is published.

Note: Products with Posting Status **Published** are visible on the store. Be careful about changing information, since the changes go to the production system and are published immediately. It is recommended that you unpublish the product before making changes, and then republish the item when finished.

7. In this product detail page in the Products tab, choose **Hierarchy Paths**.
The Hierarchy Paths page displays the hierarchy of sections that have been set up for the store. Remove or add parent sections for the product, edit the date

range when this product will be available in each section, and number the product's place in the section's product display order. Click **Update**.

8. Optional: In this product detail page in the Products tab, choose **Category and Display Styles**.

The Category and Display Styles page displays the category to which the product belongs and lists all display styles and any template names already assigned to the product. Choose a template name for each display style that you want to use for the product, in any of the following ways:

- To use the category-level default template for a display style, highlight the radio button next to the default setting on the display style line.
- To set an item-level template, highlight the radio button next to the field on the display style line and click **Go**. Select a template from the pop-up window that opens.
- Leave all fields blank to keep default templates for all display styles that you want to use for the product.

Click **Update** when finished.

9. Optional: In this product detail page in the Products tab, choose **Multimedia Components**.

The Multimedia Components page lists all multimedia components that have been set up for Oracle iStore 11*i*. Assign multimedia names to multimedia components. See [Section 6.7.1, "Creating Images for Products"](#) for more information on associating specific images with a product. Alternatively, you can leave fields blank to assign default multimedia names to multimedia components. Click **Update** when finished.

10. Optional: In this product detail page in the Products tab, choose **Relationships**.

The Relationships page displays existing relationships between the product and other products or sections and the rules for those relationships, such as the product to show for an upsell or cross sell.

To add related items for relationships, go to the Relationship tab. See [Section 6.5, "Creating Product Relationships"](#) for more information.

11. In this product detail page in the Product tab, choose **Specialty Stores**.

The Specialty Stores page lists the specialty stores where the product will be displayed. By default the product appears in those specialty stores to which the product's parent section belongs.

Select the specialty stores where the product should appear and click **Update**.

12. Repeat this procedure for every product you want to include in the product catalog.

5.7.3 Publishing Products

By publishing products, you add them to the product catalog and make them available for sale in your stores.

When you search for an item as described in [Section 5.7.1, "Searching for Products"](#), the list of search results displays a **Publish** button in the Wizard column next to any unpublished products that match your search criteria. From the search results, you can publish an unpublished product in one of two ways:

- Click the product name and change the Posting Status to **Published** in the Basic Information page that opens. See [Section 5.7.2, "Modifying the Product Catalog"](#) for more information.
- Click the **Publish** button next to the product name.

Note: Publishing or unpublishing a product in the Oracle iStore 11i Merchant UI also changes the product's Web Status setting in Oracle Inventory.

Use the following procedure to publish a product by clicking its **Publish** button.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. Search for products as described in [Section 5.7.1, "Searching for Products"](#).

The search results appear in the Product tab.

3. Click the **Publish** button next to an unpublished product that you want to publish.

The Basic Information page opens.

4. Optional: Add or modify the basic and long descriptions.
5. In the Basic Information page, click **Continue**. The Hierarchy Paths page opens.
6. Optional: Add or remove parent sections for the item.
7. In the Hierarchy Paths page, click **Continue**. The Category and Display Styles page opens.
8. Optional: Change template assignments for one or more of the display styles.
9. In the Category and Display Styles page, click **Continue**. The Multimedia Components page opens.
10. Optional: Change multimedia assignments for one or more of the multimedia components.
11. In the Multimedia Components page, click **Publish**.

5.8 Setting Up the Product Search

Oracle iStore 11i's product search feature allows you to enable your customers to search a store for products they want to buy.

The product search feature in Oracle iStore 11i is implemented using the interMedia text search utility of the Oracle8i database. The product information (part number, description, and long description) is first loaded in an Oracle iStore 11i table (IBE_CT_IMEDIA_SEARCH) via the concurrent program iStore Search Insert. This step is generally performed after the merchant has loaded his or her inventory with products. Once the data is loaded, any change to product information is updated in the Oracle iStore 11i table IBE_CT_IMEDIA_SEARCH through a database trigger call on the inventory table. This keeps product information current in the search table. Once the data is moved into the search table, the interMedia index is created to facilitate search capability of the keywords.

Note: You must ensure that both Oracle Inventory and Oracle interMedia are installed and configured properly before setting up store search. Refer to the Oracle interMedia documentation for details on how to set up and configure interMedia.

Storing Information in the Search Table

The search table IBE_CT_IMEDIA_SEARCH is a denormalized table of MTL_SYSTEM_ITEMS_TL and MTL_ITEM_CATEGORIES.

The core text on which you search is stored in a Clob called INDEXED_SEARCH. Currently it stores a concatenation of part number, name, and description of products. The table also stores inventory_item_id, organizationId, category_id, category_set_id, and the Web status field from MTL_SYSTEM_ITEMS_B table.

Searchable Product Attributes

Searches are performed on the part number, name, and description of a product. The name and description are stored as description and long description columns in the MTL_SYSTEM_ITEMS_TL table.

Search Dependencies

The product search requires version 8.1.7 of the Oracle database with the interMedia option installed. It also requires the 11i version of the Oracle Inventory schema.

Note: For enhanced query performance, enable caching of large object data for the interMedia DR\$R table.

5.8.1 Setting Up Oracle Inventory for Product Search

First, set up your inventory, under a common master organization ID. Points to remember while setting up your inventory include:

- Give products unique names.
- Do not leave category names (concatenated segments) blank or non-unique. They can be null or non-unique in the database, but show as blanks or multiple times in the Categories LOV in your customer home page.
- Make sure the products have Web Status set to **Published** in the Master Item form. See [Section 3.1.8, "Setting Up Product Items in Oracle Inventory"](#) for

instructions. You can also query this field by examining the `web_status` column of the item in the `MTL_SYSTEM_ITEMS` table.

Next, set the iStore profile options for search.

5.8.2 Setting Search Profile Options

Oracle iStore 11i search needs six iStore (IBE) profile options to be set. The following table lists these profile options with their descriptions.

Table 5–3 Search Profile Options

Profile Option	Description
Enable Fuzzy Search	If set to Yes , this profile option allows users to perform fuzzy product searches, so that they do not have to type in the exact spelling of their search criteria to retrieve results that match these criteria. If this profile option is not set, it defaults to No .
No of Results in Search	This profile option sets the maximum cap on the search results. For example, if the user searches for a very common keyword (not in the stop words list), then the search process stops after the maximum cap set in this profile option, even if the process has not searched through Oracle Inventory completely. If this profile option is not set, it defaults to 200.
Search Lines Per Page	This profile option sets the number of lines to be displayed per page. If this profile option is not set, it defaults to 20.
Thesaurus File Name	This profile option specifies the prefix for the thesaurus names of the synonym files that you load for the Oracle iStore 11i product synonym search. In the thesaurus names, you must use this prefix followed by <code>_language_short_code</code> . The profile option thus standardizes the thesaurus names. If the profile option is not set, it defaults to <code>IBETHESAURUS</code> . Note: If you change this profile option after you have loaded synonym files, those synonym files are no longer accessible, and you must load the synonym files with their new thesaurus names.
Use Category Search	This profile option determines whether the home page pull-down search menu allows category-level or section-level searching. Yes causes the pull-down menu to list categories with publishable items, while No causes it to list the minisite's top level sections. A null value enables a basic search against all products in the current minisite.

Table 5–3 Search Profile Options (Cont.)

Profile Option	Description
Use Synonym Search	This profile option determines whether the product search retrieves product names that are synonyms of the users' search keywords. Yes enables the synonym search after you have loaded a thesaurus. No disables the synonym search. If this profile option is not set, it defaults to No .

Decide to enable either category-level or section-level searches from the Customer UI home page pull-down menu, then carry out the appropriate procedure to populate the search table with data and create the interMedia text index.

5.8.3 Populating the Category-Level Search Table

To enable category-level search on the Customer UI, the iStore Search Insert program only needs to be run once to populate the search table IBE_CT_IMEDIA_SEARCH. After this one-time product data load, the table will get updated product information through a database trigger call on the inventory table.

Login

Log in to Oracle Forms as the concurrent program manager.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

Set the profile option IBE: Use Category Search to **Yes**.

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs Responsibility.
2. In the pop-up window, choose **Single Request** and click **OK**.
The Submit Request window opens.
3. Choose **iStore Search Insert** from the Name LOV.
4. Click **Submit** to start the concurrent request. Note the request ID.

5. Optional: You can monitor the progress of your request by looking at the request log and output files in `$COMMON_TOP/admin/log/1<request ID>.log` and `$COMMON_TOP/admin/out/o<request ID>.out`, respectively.
6. Optional: You can also view the request status by selecting **View Requests** and searching by the request ID.

Note: You will only be able to search for products whose `WEB_STATUS` is `PUBLISHED`.

This process can take a substantial amount of time, depending on the number of items you have. As an estimate, for about 300,000 items in inventory this program can take about 45 minutes to run.

The concurrent manager calls the iStore Search Insert program, which moves the product data from the inventory table to the Oracle iStore 11i search table `IBE_CT_IMEDIA_SEARCH`. When this job is running, the search tables are purged and the product search does not work correctly on the store.

Caution: Since this batch job deletes data from the search table, the rollback segment should be large enough for the process to complete.

Once the request is complete, you can search for products based on part number, name, and description. The pull-down search menu on the store's home page lists categories with publishable items. If additional product attributes are to be added in the search, this SQL script needs to be modified to add the extra search column.

5.8.4 Populating the Section-Level Search Table

To enable section-level search on the Customer UI for the first time, run the iStore Search Insert program first, then run the iStore Section Search Refresh program to populate the search table `IBE_SECTION_SEARCH`.

Whenever you update the Oracle iStore 11i hierarchy, rerun only the iStore Section Search Refresh program to update the search table `IBE_SECTION_SEARCH`.

Login

Log in to Oracle Forms as the concurrent program manager.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

Set the profile option IBE: Use Category Search to **No**.

Steps

1. Carry out the procedure outlined in [Section 5.8.3, "Populating the Category-Level Search Table"](#) to load data into the main search table IBE_CT_IMEDIA_SEARCH.

2. In the iStore Concurrent Programs Responsibility, choose **Single Request** and click **OK**.

The Submit Request window opens.

3. Choose **iStore Section Search Refresh** from the Name LOV.

4. Click **Submit** to start the concurrent request. Note the request ID.

The concurrent manager calls the iStore Section Search Refresh program, which populates the search table IBE_SECTION_SEARCH with product data. The product search is still available to customers while the iStore Section Search Refresh program is running.

Once the request is complete, the pull-down search menu on the store's home page lists the top level sections, not the product categories.

5.8.5 Changing Between Category-Level Search and Section-Level Search

To change the listings in the pull-down search menu from categories to sections or vice versa, rerun the iStore Search Insert concurrent program to ensure that product listings will not be duplicated.

Login

Log in to Oracle Forms as the concurrent program manager.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

Change the IBE: Use Category Search profile option to **Yes** if you are changing to the category-level search. Change the profile option to **No** if you are changing to the section-level search.

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs Responsibility.
2. In the pop-up window, choose **Single Request**, and click **OK**.
The Submit Request window opens.
3. Choose **iStore Search Insert** from the Name LOV.
4. Click **Submit** to start the concurrent request. Note the request ID.
5. Optional: You can monitor the progress of your request by looking at the request log and output files in `$COMMON_TOP/admin/log/1<request ID>.log` and `$COMMON_TOP/admin/out/o<request ID>.out`, respectively.
6. Optional: You can also view the request status by selecting **View Requests** and searching by the request ID.

If you are changing the search from section level to category level, the pull-down search menu lists categories once the request is completed.

If you are changing the search from category level to section level, perform the following steps after the request is completed:

7. In the iStore Concurrent Programs Responsibility, choose **Single Request** and click **OK**.
The Submit Request window opens.
8. Choose **iStore Section Search Refresh** from the Name LOV.
9. Click **Submit** to start the concurrent request. Note the request ID.

The pull-down search menu lists the top-level sections once the request is complete.

5.8.6 Enabling Fuzzy Searches

The fuzzy search functionality returns search results with product names that do not match the spelling of the users' search criteria exactly. For example, if a user enters "laptops" or "laptp," the search retrieves product names with the word "laptop."

You can enable the fuzzy search functionality by setting the profile option IBE: Enable Fuzzy Search to **Yes** and running the iStore Search Insert concurrent program, as well as the iStore Section Search Refresh concurrent program if you have enabled section-level searches. Every time you change the value of the IBE: Enable Fuzzy Search profile option, you must rerun the iStore search concurrent programs.

If the fuzzy search is active, part number searches are unavailable because such searches require completely accurate matching.

Fuzzy search is currently not supported for Japanese language implementations.

5.8.7 Enabling Synonym Searches

The synonym search functionality returns search results with product names that you have set up as synonyms of the users' search criteria. For example, if a user enters "database," and you have set up "database" as a synonym of the phrase "Oracle8i," the search retrieves product names with the phrase "Oracle8i."

You can set up synonym searches for each of your supported languages.

Synonym searches do not process wildcards. For example, if a user enters "datab%" as a search criterion, the synonym search would look for synonyms for "datab" only and would not retrieve product names that are synonyms of "database."

Set up the synonym search functionality for any language using the following procedure.

Login

None

Responsibility

None

Prerequisites

Set the profile option IBE: Thesaurus File Name. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more details.

Steps

1. Create a synonym file ("thesaurus") for the Oracle iStore 11i product search. See *Oracle8i interMedia Text Reference* for instructions on creating a synonym file.

You can find examples of synonym files in the `$ORACLE_HOME/ctx/thes` directory, where `$ORACLE_HOME` points to the 8.1.7 environment.

2. Load the thesaurus using the `ctxload` utility in `$ORACLE_HOME/ctx/bin` as follows:

```
ctxload -user <username/password> -thes -name <thesaurus name> -thescase
<y/n> -file <file name>
```

<username/password> is your user name and password, e.g., `ctxsys/ctxsys`.

<thesaurus name> is the thesaurus name with the syntax `prefix_language_short_code` to indicate the thesaurus language. The prefix is set in the profile option IBE: Thesaurus File Name. For example, if the profile option is set to `ibethes`, then the thesaurus name is `ibethes_us` for American English, since the language short code is `us`. For French, the thesaurus name is `ibethes_f`, since the language short code is `f`. You can find the language codes by selecting `LANGUAGE_CODE` from the `FND_LANGUAGES` table.

<y/n> indicates whether the thesaurus is case sensitive. Enter `y` if you want the thesaurus to be case sensitive, or `n` if you want it to be case insensitive.

<file name> is the physical synonym file's name, e.g., `MyThes.txt`.

The following example is the command you should run as username `ctxsys` with password `ctxsys` when loading an American English thesaurus with the physical file name `MyThes.txt` for a case insensitive synonym search, when the profile option IBE: Thesaurus File Name is set to `ibethes`.

```
ctxload -user ctxsys/ctxsys -thes -name ibethes_us -thescase n -file
MyThes.txt
```

3. Set the profile option IBE: Use Synonym Search to **Yes**.

Synonym search is now available.

Note: If you have already loaded a thesaurus for a given language, you can use Oracle8i interMedia APIs such as `ctx_thes.create_relation` and `ctx_thes.delete_relation` to add or remove synonyms in that language for existing searchable items. You can also add or remove phrases by using the APIs `ctx_thes.create_phrase` and `ctx_thes.delete_phrase`. See *Oracle8i interMedia Text Reference* for more information.

5.8.8 Creating Search Index Tables

To be able to run external procedures to create a search index table, please ensure that `ENVS` is included in your `SID_DESC` part of `listener.ora` as follows.

Login

None

Responsibility

None

Prerequisites

None

Steps

1. Go to 8.1.7 `ORACLE_HOME`:

```
cd /u02/visappl
ksh
. ./APPSORA.env
cd $ORACLE_HOME/..8.1.7/network/admin
```

This directory should contain `listener.ora`.

2. Verify that `listener.ora` contains the following:

```
(SID_DESC =
  (SID_NAME = PLSExtProc)
  (ORACLE_HOME = /u04/visora/8.1.7)
  (ENVS = LD_LIBRARY_PATH=/u04/visora/8.1.7/ctx/lib)
  (PROGRAM = extproc)
)
```

3. Before creating the search index table, make sure that the Oracle interMedia server is up. Use the following command to check:

```
$ ps -ef | grep ctxsrv
```

If it is not running, start the Oracle interMedia server as follows:

4. Go to 8.1.7 ORACLE_HOME:

```
cd /u02/visappl
ksh
. ./APPSORA.env
cd $ORACLE_HOME/./8.1.7
. ./VIS.env
```

This will set up 8.1.7 ORACLE_HOME env.

5. Run the following command:

```
ctxsrv -user ctxsys/ctxsys&
```

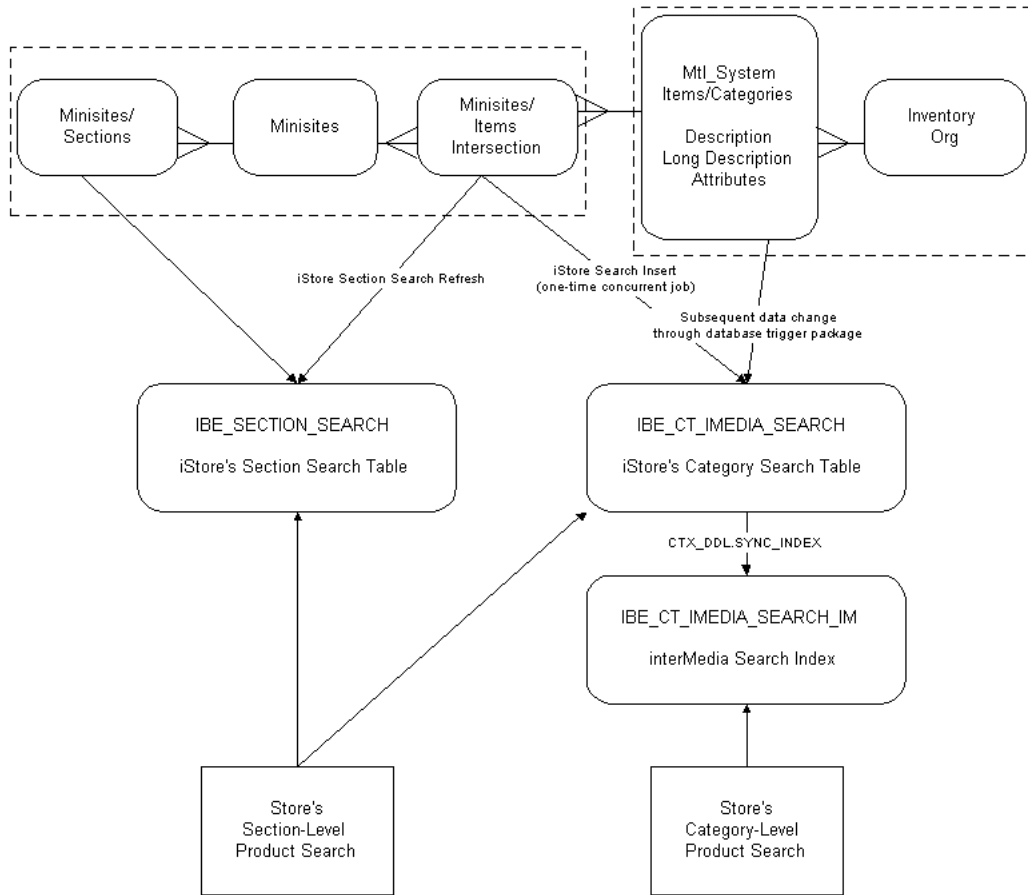
5.8.9 PL/SQL, Java, and JSPs Involved in Search

The following program units are used in the product search process:

- java/catalog/Search.java (main Java program that executes the query)
- ibeCSrdSrchResults.jsp (search result JSP)
- ibeCZzdMenu.jsp (main home page)
- ibeCSrdSrchAdvForm.jsp (search result JSP)
- IBEVCSKS.pls (package specification)
- IBEVCSKB.pls (package body for trigger on search table)
- IBEVCSUB.pls (package body)
- IBEVIDTS.pls (package specification for the main database trigger)
- IBEVIDTB.pls (package body for the main database trigger)
- java/catalog/PrdRec.java (definition of search result object)
- IBEVCSIS.pls (package specification for section search package)
- IBEVCSIB.pls (package body for category and section search package; one time load of product descriptions through concurrent manager)

- ibecsmcr.sql (creates materialized view to facilitate availability of product search functionality during iStore Section Search Refresh)

Figure 5–4 Oracle iStore 11i Search Tables



5.8.10 Customizing Search

If you need to add more attributes of the item to search for, you must modify IBEVCSIB.pls for the initial load and the PL/SQL triggers mentioned above to make sure that updates to these attributes get propagated to the search table.

1. Modify the search package (IBEVCSKS.pls and IBEVCSKB.pls) for adding the additional product search attributes. By default, only the part number, product name (description column), and product description (long description column) are included in the search.

If additional attributes are to be added in the product search, the parameters for the package specification and body will have to be changed accordingly, with the new attributes. This package moves the subsequent changes in the product information, to Oracle iStore 11i's search table IBE_CT_IMEDIA_SEARCH. Any insert, delete, or update on MTL_ITEM_CATEGORIES, any delete or update on MTL_SYSTEM_ITEMS_B and any insert, delete, or update on MTL_SYSTEM_ITEMS_TL table will move the change to the search table IBE_CT_IMEDIA_SEARCH through this procedure. This procedure is called from the main database trigger procedures, as explained in the next step.

2. If new parameters are added to the search package, the call to the search package must be modified in the main database trigger package IBEVIDTB.pls to include the new parameters added to the search move procedures. This package body calls all of Oracle iStore 11i's ERP-related database trigger procedures, including the search package procedures.
3. The database trigger on the product tables calls the main database trigger package to move the product data change to the Oracle iStore 11i search table IBE_CT_IMEDIA_SEARCH.

However, modifying the search package call will not recreate the interMedia index to include the changed information in the search table IBE_CT_IMEDIA_SEARCH. Administrators must refresh the interMedia search index every time a new product is added or an existing product is changed or deleted. You can refresh the interMedia index IBE_CT_IMEDIA_SEARCH_IM through the Oracle Enterprise Manager utility, or by executing the command "CTX_DDL.SYNC_INDEX" in SQL*Plus as follows:

```
exec ctx_ddl.sync_index('IBE_CT_IMEDIA_SEARCH_IM');
```

You must have privileges to alter the interMedia index. After this step, the modified product information is visible in the Oracle iStore 11i product search process.

5.8.11 Adding Stopwords to Searches

There are many search words such as "and," "if," and "then" which are very common and will return numerous search results. Search results may not be relevant to the user's query if such common search keywords are used. In addition, searches on common keywords use processing resources and slow down performance. These common keywords can be excluded from the search by using the "Stop Words" utility in interMedia.

Log in to Oracle Enterprise Manager as CTXSYS to see the stop words in the Stop List. You can add more stop keywords to the Stop List.

5.9 Setting Up Notifications

Oracle iStore 11*i* sends notifications to users and sales representatives to inform them of the statuses of various activities. These notifications are for the recipients' information only and do not require a reply, although some notifications alert the recipients to a need for action on their part. The notifications are triggered by specific events, such as user actions and application data refreshes.

Oracle iStore 11*i* comes with seeded Oracle Workflow notification events and messages. You can create new messages in Oracle Workflow, as described in [Chapter 17, "Integrating Oracle iStore 11*i* with Oracle Workflow"](#).

In the Merchant UI, you can select the default message for each notification event and map other messages to the notifications according to two parameters:

- Organization
- User type

Note: The organization is determined by the setting of the profile option MO: Operating Unit for the user's responsibility.

The default message is the message where every parameter is set to ALL. For any notification event, if you have not set up a message for a specific organization-user type combination, Oracle iStore 11*i* uses the default message.

You can also choose to disable a notification event, either completely or for specific organization-user type combinations.

The following table describes all Oracle iStore 11*i* notifications and lists their triggers and recipients.

Table 5–4 Oracle iStore 11i Notifications

Notification	Description	Recipients	Trigger
User Registration	A welcome message	Registering user	A user registers in a specialty store, or a B2B user is registered by a B2B primary user.
Shared Cart	A message explaining how to access shared shopping carts	Shared cart owner and sharees	A user submits a request to share a cart.
Order Confirmation - Normal	An order confirmation message	User	A user places an order in a specialty store.
Order Confirmation - Next steps for faxed orders	A message explaining the remaining steps for order submission	User	A user places an order and chooses to fax a credit card or purchase order as payment.
Orders Not Booked Notification	A message announcing that an order has not been booked	The order administrator specified in the profile option IBE: Default Order Admin to Send Workflow Notification	A user's order is not booked.
Sales Assistance Request - To Users	A message acknowledging a request for sales assistance	User	A user requests sales assistance.
Sales Assistance Request - To Sales Representatives	A message describing a request for sales assistance	Sales representative for the user's operating unit	A user requests sales assistance.
Contract Negotiations Request - To Users	A message acknowledging a request for a change to contract terms	User	A user requests changes in contract terms.
Contract Negotiations Request - To Sales Representatives	A message describing a request for changes to contract terms	Contract sales representative for the user's operating unit	A user requests changes in contract terms.
Contract Negotiations Request - Approval	A message announcing approval of a contract terms change request	User Contract sales representative for the user's operating unit	A contract administrator approves a user's request for changes in contract terms.
Contract Negotiations Request - Cancellation	A message announcing cancellation of contract negotiations	User Contract sales representative for the user's operating unit	A contract administrator cancels the contract that was created when a user requested changes in contract terms.

Table 5–4 Oracle iStore 11i Notifications (Cont.)

Notification	Description	Recipients	Trigger
Contract Negotiations Request - Disapproval	A message announcing rejection of a contract terms change request	Contract sales representative for the user's operating unit	A contract administrator rejects a user's request for changes in contract terms.
Reports - iStore Historical Summary	A message with the information from the Store Order Summary Data Out Bin	Users specified in the Merchant UI under Reports > Email Preferences	The concurrent programs for the Storefront Reports refresh the report data.
Reports - iStore Top Orders	A message with the information from the Store Orders Data Out Bin	Users specified in the Merchant UI under Reports > Email Preferences	The concurrent programs for the Storefront Reports refresh the report data.

5.9.1 Message Configurations

You can configure notification events by mapping different messages to combinations of organization and user type. The following table shows possible message configurations for the notification Order Confirmation - Normal.

Table 5–5 Sample Configurations for the Notification Order Confirmation - Normal

Organization	User Type	Message
All	All	Message 1 (default)
All	Business User	Message 2
Organization A	All	Message 3
Organization A	Individual User	Message 4

Users receive the order confirmation message with the configuration that matches the users' data. If no customized configurations match the users' data, the users receive the default message for all organizations and user types.

When Oracle iStore 11i sends a notification, it chooses the message with the parameters that match the user's data most closely. For example, with the message configuration listed in [Table 5–5](#), an individual user who places an order against Organization A receives Message 4, not Message 1 or Message 3.

If more than one message applies to the user, the user's organization takes precedence over the user type. For example, with the message configuration listed

in [Table 5-5](#), a business user who places an order against Organization A receives Message 3, not Message 2.

Note: When mapping messages, you must ensure that the organization and user type combinations are valid. These combinations should correspond to the supported responsibilities and other access restrictions that you have set up for your specialty stores.

Organization and user type are not relevant to certain notifications. In such cases, you cannot map messages for these parameters, and the Oracle iStore 11i pull-down menus from which you would normally choose organization or user type display as read-only fields instead.

Note: Although a pull-down menu for specialty store exists for several notifications, configuring notifications by specialty store is currently not supported. You should select ALL from the specialty store pull-down menu when configuring notifications.

The following table shows a list of notifications and their configurable parameters.

Table 5-6 Configurable Parameters for Notifications

Notification	Organization	User Type
User Registration	Yes	Yes
Shared Cart	Yes	Yes
Order Confirmation - Normal	Yes	Yes
Order Confirmation - Next steps for faxed orders	Yes	Yes
Orders Not Booked Notification	No	No
Sales Assistance Request - To Users	Yes	Yes
Sales Assistance Request - To Sales Representatives	Yes	No
Contract Negotiations Request - To Users	Yes	Yes
Contract Negotiations Request - To Sales Representatives	Yes	No
Contract Negotiations Request - Approval	Yes	Yes

Table 5–6 Configurable Parameters for Notifications (Cont.)

Notification	Organization	User Type
Contract Negotiations Request - Cancellation	Yes	Yes
Contract Negotiations Request - Disapproval	Yes	No
Reports - iStore Historical Summary	No	No
Reports - iStore Top Orders	No	No

5.9.2 Setting Up Notification Recipients

Several Oracle iStore 11*i* notifications are sent to sales representatives and contract sales representatives. You must specify these sales representatives in Oracle Human Resources for each of your organizations.

Note: Oracle iStore 11*i* no longer uses the profile option IBE: Default Sales Assistant to Send Workflow Notification to specify the recipient of sales assistance request notifications. If you previously used this profile option, you must now set up the sales representative in Oracle Human Resources.

Use the following procedure to set up a sales representative and a contract sales representative for an organization.

Login

Log in to Oracle Forms.

Responsibility

Human Resources

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Human Resources responsibility.
2. Choose **Work Structures > Organization > Description**.

The Find Organization window opens.

3. In the Find Organization window, enter the search criteria for your merchant organization and click **Find**.

The Organization form opens with the organization's record.

4. In the Organization Classifications region, select **Operating Unit** in the Name fields.

5. Click **Others**.

The Additional Organization Information window opens.

6. In the Additional Organization Information window, choose **Default Notify User** and click **OK**.

The Additional Organization Information - Default Notify User window opens.

7. Place your cursor in the Default Notify User field.

The Default Notify User window opens.

8. In the Contracts field of the Default Notify User window, enter the user name of the contract sales representative who should receive notifications of contract negotiation requests for the organization.

9. In the Sales Assistance field of the Default Notify User window, enter the user name of the sales representative who should receive notifications of sales assistance requests for the organization. Click **OK**.

Note: Use uppercase letters only when entering user names.

10. In the Additional Organization Information - Default Notify User window, click **OK**.

11. Save the record.

12. For both sales representatives, specify e-mail addresses as follows:

- a. In the Navigator, choose **People > Enter and Maintain**.

The Find Person window opens.

- b. In the Find Person window, enter the search criteria for the sales representative and click **Find**.

The People window opens with the sales representative's employee record.

- c. In the Office Details tab, enter the sales representative's e-mail address in the Email field. The sales representative will receive notifications at this e-mail address.
13. Save the record.

5.9.3 Adding Message Configurations

Use the following procedure to add message configurations for notification events according to organization or user type.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- Create Oracle Workflow messages for Oracle iStore 11i notifications. See [Chapter 17, "Integrating Oracle iStore 11i with Oracle Workflow"](#) for details.
- Set the profile option IBE: Use Workflow Features in iStore to **Yes**. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more information.
- Set the profile option IBE: Default Order Admin to Send Workflow Notification. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more information.
- Set up sales representatives and contract sales representatives for notifications in Oracle Human Resources. See [Section 5.9.2, "Setting Up Notification Recipients"](#) for more information.

Steps

1. Launch the Merchant UI.
2. In the Setup tab, click **Notifications**.
The Notifications page opens.
3. Click the name of a notification event that you want to modify.
The Notification Configuration page opens, displaying the default configuration and existing configurations.

4. In the Notification Configuration page, click **Add Configuration**.
The Add Configuration page displays pull-down menus for Status and Message. The page also displays pull-down menus for Specialty Store, Organization, and User Type if you can configure the notification by these parameters.
5. Choose **Enabled** from the Status pull-down menu.
6. Choose the mapping specifications from the Specialty Store, Organization, and User Type pull-down menus.

Note: Configuring notifications by specialty store is currently not supported. Select ALL from the Specialty Store pull-down menu.

7. Choose a message from the Message pull-down menu. The Message pull-down menu has a list of the messages created in Oracle Workflow for this notification.
8. Click **Add**.
The Notification Configuration page opens, updated with the new configuration.
9. Optional: Click **Notifications** to return to the Notifications page.

5.9.4 Modifying Message Configurations

Use the following procedure to modify existing message configurations for notification events. You can also use this procedure to choose another default message.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- Create Oracle Workflow messages for Oracle iStore 11i notifications. See [Chapter 17, "Integrating Oracle iStore 11i with Oracle Workflow"](#) for details.

- Set the profile option IBE: Use Workflow Features in iStore to **Yes**. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more information.
- Set the profile option IBE: Default Order Admin to Send Workflow Notification. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more information.
- Set up sales representatives and contract sales representatives for notifications in Oracle Human Resources. See [Section 5.9.2, "Setting Up Notification Recipients"](#) for more information.

Steps

1. Launch the Merchant UI.
2. In the Setup tab, click **Notifications**.
The Notifications page opens.
3. Click the name of a notification event that you want to modify.
The Notification Configuration page opens, displaying the default configuration and existing configurations.
4. In the Notification Configuration page, highlight the Select radio button next to the configuration that you want to modify, and click **Update**.
The Update Configuration page displays pull-down menus for Status and Message. The page also displays pull-down menus for Specialty Store, Organization, and User Type if you can configure the notification by these parameters.
5. Choose **Enabled** from the Status pull-down menu.
6. Choose the mapping specifications from the Specialty Store, Organization, and User Type pull-down menus.

Note: Configuring notifications by specialty store is currently not supported. Select ALL from the Specialty Store pull-down menu.

7. Choose a message from the Message pull-down menu. The Message pull-down menu has a list of the messages created in Oracle Workflow for this notification.
8. Click **Update**.

The Notification Configuration page opens, updated with the modified configuration.

9. Optional: Click **Notifications** to return to the Notifications page.

Note: If you are modifying the default configuration, you can only change the status and the message. The default configuration is marked with an asterisk (*) in the Specialty Store column. The default configuration parameters are each set to ALL.

5.9.5 Removing Message Configurations

Use the following procedure to remove existing message configurations from notification events. After you remove a message configuration, the notification uses its default message for that organization-user type combination if no other configuration applies.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. In the Setup tab, click **Notifications**.
The Notifications page opens.
3. Click the name of a notification event from which you want to remove a configuration.
The Notification Configuration page opens, displaying the default configuration and existing configurations.
4. Highlight the Select radio button next to the configuration that you want to delete, and click **Remove**.

The Notification Configuration page updates with your changes.

Note: You cannot remove the default configuration. The default configuration is marked with an asterisk (*) in the Specialty Store column.

5.9.6 Disabling Notification Events

Use the following procedure to disable a notification event completely or for specific organization-user type combinations. When you disable a notification event completely, Oracle iStore 11*i* does not send any notifications for that event. When you disable a notification configuration, Oracle iStore 11*i* does not send any notifications for the case that you have specified.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. In the Setup tab, click **Notifications**.
The Notifications page opens.
3. If you want to disable a notification across all organizations and user types, follow these steps:
 - a. In the Notifications page, check the notification's Disable checkbox.
 - b. Click **Update** to save your changes.
4. If you want to disable a notification for an existing configuration of organization and user type, follow these steps:
 - a. In the Notifications page, click the name of the notification event.
The Notification Configuration page opens.

5.10 Setting Up Storefront Reports

Oracle iStore 11*i* has pre-defined reports that collect and present valuable business data about your customers' interactions with your stores. These reports include the following:

- **Top Product Sales Report**—This report identifies your best-selling products.
- **Customer Sales Report**—This report identifies your top customers.
- **Top N Orders Report**—This report identifies the orders with the largest sales totals.
- **Historical Summary Report**—This report summarizes orders according to several different time periods.

All Storefront Reports data is pulled from the time range that you specify when preparing the report data, as outlined in [Section 5.10.4, "Preparing Data for Storefront Reports"](#).

You can view these reports in the Merchant UI Reports tab by using the Data Out Bins. You can also set up the Top N Orders Report and Historical Summary Report for delivery as e-mail notifications. The following table summarizes the different formats available for each report.

Table 5–7 Storefront Reports Formats

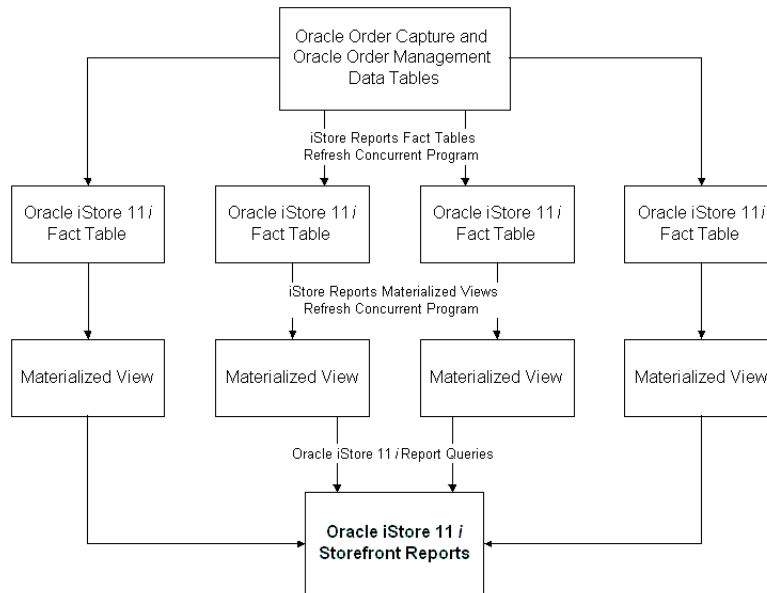
Report Name	Data Out Bin	E-mail Notification
Top Product Sales Report	Yes	No
Customer Sales Report	Yes	No
Top N Orders Report	Yes	Yes
Historical Summary Report	Yes	Yes

Before viewing the reports, you must first prepare the report data in Oracle Forms. You also need to configure the Data Out Bins by setting your bin preferences in the Oracle iStore 11*i* Merchant UI.

5.10.1 Understanding Storefront Reports Architecture

The basic architecture for Storefront Reports is shown in the following figure.

Figure 5–5 Storefront Reports Architecture



The iStore Reports Fact Tables Refresh concurrent program pulls data that is within a certain user-specified time frame from Oracle Order Capture and Oracle Order Management data tables into Oracle iStore 11i fact tables, which act as data summaries. This process can be very time consuming, depending on how much data the tables hold and the extent of the time frame you specify.

The reports and queries that comprise Storefront Reports are run against these fact tables. The following table describes the fact tables for Storefront Reports.

Table 5–8 Fact Tables for Storefront Reports

Fact Table Name	Description
IBE_ECR_MVLOG	This table captures the refresh log history, as well as the begin date and end date of the transaction records that are refreshed into the base materialized views.

Table 5–8 Fact Tables for Storefront Reports (Cont.)

Fact Table Name	Description
IBE_ECR_ORDER_HEADERS_FACT	This table provides header-level information for orders from Oracle Order Management tables. The orders are placed for sources that are specified in the lookup iStore Order Facts Sources (IBE_ECR_ORDER_SOURCE).
IBE_ECR_ORDERS_FACT	This table provides information from Oracle Order Management tables about the sale and quantity of items in orders, including data for Product, Customer, and Contracts.
IBE_ECR_QUOTES_FACT	This table provides information from Oracle Order Capture tables about items in quotes and shopping carts.

The iStore Reports Materialized Views Refresh concurrent program refreshes materialized views of these fact tables. Refreshing a materialized view is usually a fast process.

If the profile option IBE: iStore Materialized Views Usage is set to **Yes**, then when the queries for Storefront Reports are run against the fact tables, the database engine (cost-based optimizer) automatically reroutes the queries against the corresponding materialized views for enhanced query performance. If the materialized views are not available, the queries run against the fact tables. This architecture guarantees that data is always available for the Storefront Reports.

The iStore Alert Reports concurrent program triggers delivery of the updated Top N Orders Report and Historical Summary Report as e-mail notifications.

5.10.2 Setting Profile Options for Storefront Reports

Set the following mandatory profile options to configure Storefront Reports:

- IBE: Currency Code
- IBE: GL Conversion Type
- IBE: GL Period Set Name

You can also set the following optional profile options for Storefront Reports if you do not want to use the default settings:

- IBE: Enable Force Refresh
- IBE: Enable Parallel Data Extraction for Reporting
- IBE: iStore Materialized Views Usage

- IBE: Quarter Begin Data
- IBE: Truncate Records
- IBE: Use Default Bin Preference
- IBE: YTD Data Availability in Bins

See [Section A.5.2, "IBE Profile Options for Storefront Reports"](#) for profile option descriptions and setup procedures.

5.10.3 Setting Up Conversion Rates for Storefront Reports

Oracle iStore 11i can have business transactions from multiple stores, each of which can support multiple currencies. This results in the Storefront Reports functionality compiling business reports from transactions in multiple currencies. These currencies must be resolved to a single currency for Storefront Reports. The Storefront Reports currency is specified at three different stages:

- The currency for the fact tables is determined by the profile options IBE: Currency Code and IBE: GL Conversion Type, and the daily currency conversion rate in Oracle General Ledger.
- The currency for the Data Out Bin fact tables is determined by the lookup iStore Reporting Currencies (IBE_ECR_REPORTING_CURRENCY). See [Section 5.10.6, "Storefront Reports Lookup Types"](#) for more information.
- The currency for the Data Out Bins is determined by the user in the Bin Preferences subtab of the Reports tab in the Merchant UI. See *Oracle iStore Concepts and Procedures* for more information.

Use this procedure to set the daily currency conversion rate in Oracle General Ledger. You can set the profile options IBE: Currency Code and IBE: GL Conversion Type before or after this procedure, to complete currency setup for the Storefront Reports fact tables.

Login

Log in to Oracle Forms.

Responsibility

General Ledger Super User

Prerequisites

None

Steps

1. Log in to Oracle Forms with the General Ledger Super User responsibility.
2. Choose **Setup > Currencies > Rates > Daily**.

The Daily Rates window opens.

3. Review or enter your desired currency conversions, using the following guidelines:
 - There should be a line for every currency conversion that you need, for every date for which the Storefront Reports will request data.
 - The From fields should have the currencies in which your stores provide transactions.
 - The To fields should contain the value for the currency that you want the fact tables to use. This value is the same as the setting of the profile option IBE: Currency Code.
 - The values in the Conversion Type fields should equal the value of the profile option IBE: GL Conversion Type.

You can enter the currency conversions one line at a time, or click **Enter by Date Range . . .** to enter the currency conversions for a date range at one time.

4. Save your changes.

5.10.4 Preparing Data for Storefront Reports

You must populate the Storefront Reports' fact tables and materialized views with data for the entire time range in which you are interested before you can view the Storefront Reports in the Merchant UI.

When you update the data later, you can choose either to refresh the fact tables and materialized views for the entire new time range, or to add only the data for the time since the last data refresh.

Use the iStore Reports Complete Data Refresh Set concurrent programs to refresh data for the entire time range. This Refresh Set provides completely updated, accurate data. For this reason, it is recommended that you run this Refresh Set instead of the iStore Reports Increment Data Refresh Set if possible.

Use the iStore Reports Increment Data Refresh Set concurrent programs to add only data for the time period between the last data refresh and your new desired end date. This Refresh Set is faster than the iStore Reports Complete Data Refresh Set,

but may not be accurate if the unrefreshed data has changed since it was last captured.

Note: It is recommended that you schedule these concurrent program sets to run at regularly scheduled intervals. Otherwise, you will need to rerun at least one of these concurrent program sets every time you want to refresh the Storefront Reports data.

Each Refresh Set has three concurrent programs:

- iStore Reports Fact Tables Refresh
- iStore Reports Materialized Views Refresh
- iStore Alert Reports

[Section 5.10.1, "Understanding Storefront Reports Architecture"](#) describes the functions of these concurrent programs.

Note: Make sure that the conversion rate from all transactional currencies to the reporting currency is defined for the time period of data that you will refresh. See [Section 5.10.3, "Setting Up Conversion Rates for Storefront Reports"](#) for details.

iStore Reports Complete Data Refresh Set

The iStore Reports Complete Data Refresh Set is the recommended data preparation procedure.

When you run the concurrent programs in the iStore Reports Complete Data Refresh Set, you can specify a begin date for the data. This begin date is also controlled by the profile options IBE: Quarter Begin Data and IBE: YTD Data Availability in Bins. The following table summarizes the concurrent programs' begin date selection logic for different profile option settings and user date entries.

Table 5–9 iStore Reports Complete Data Refresh Set Begin Date Selection

IBE: YTD Data Availability in Bins	IBE: Quarter Begin Data	Begin Date Selection
Yes	N/A	The concurrent programs choose the earlier of the user-entered date and the first day of the current Oracle General Ledger year. If the user does not enter a begin date, the concurrent programs default to the first day of the current year.
No	Yes	The concurrent programs choose the earlier of the user-entered date and the first day of the current Oracle General Ledger quarter. If the user does not enter a begin date, the concurrent programs default to the first day of the current quarter.
No	No	The concurrent programs choose the earlier of the user-entered date and the system date. If the user does not enter a begin date, the concurrent programs default to the system date.

Use this procedure to prepare Storefront Reports data with the iStore Reports Complete Data Refresh Set.

Login

Log in to Oracle Forms as the concurrent program manager.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

- Set up conversion rates in Oracle General Ledger, as described in [Section 5.10.3, "Setting Up Conversion Rates for Storefront Reports"](#).
- Set the profile options IBE: Currency Code, IBE: GL Conversion Type, IBE: GL Period Set Name, IBE: Enable Force Refresh, IBE: Enable Parallel Data Extraction for Reporting, IBE: Quarter Begin Data, IBE: Truncate Records, and IBE: YTD Data Availability in Bins. See [Section A.5.2, "IBE Profile Options for Storefront Reports"](#) for details.

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs Responsibility.
The Submit a New Request window opens.
 2. Choose **Request Set** and click **OK**.
The Submit Request Set window opens.
 3. Choose the request set **iStore Reports Complete Data Refresh Set** from the Request Set LOV.
The Submit Request Set window is populated with the concurrent programs that are in iStore Reports Complete Data Refresh Set.
 4. Place your cursor in the Parameters field for iStore Reports Fact Tables Refresh.
The Parameters window opens.
 5. Set the parameters as follows:
 - a. Refresh Mode: **Complete**
 - b. Begin Date: The start date for the time period for which data should be pulled from the Oracle Order Capture and Oracle Order Management tables.
 - c. End Date: The ending date for the time period for which data should be pulled from the Oracle Order Capture and Oracle Order Management tables. If you leave this blank, it defaults to the current system date.
- Click **OK**.
- The Parameters field for iStore Reports Fact Tables Refresh is populated with the parameters.
6. Place your cursor in the Parameters field for iStore Reports Materialized Views Refresh.
The Parameters window opens.
 7. Verify that the Fact Refresh Mode parameter is set to **Complete**, and click **OK**.
The Parameters field for iStore Reports Materialized Views Refresh is populated with the parameter.
 8. Place your cursor in the Parameters field for iStore Alert Reports.
The Parameters window opens.

9. Set the Enabled parameter to **Yes** if you want to send the Top N Orders Report and Historical Summary Report as e-mail notifications, or **No** if you do not want to trigger the notifications. Click **OK**.

The Parameters field for iStore Alert Reports is populated with the parameter.

Note: See *Oracle iStore Concepts and Procedures* for information on specifying notification recipients and message format.

10. Optional: Click **Schedule . . .** to change the time when the reports will run.
11. Click **Submit** to submit the concurrent program requests.
12. Choose **View > Requests** to see the status of your requests.

When the concurrent programs are finished, the data for the Storefront Reports is available for report queries from the Oracle iStore 11i Merchant UI.

iStore Reports Increment Data Refresh Set

The iStore Reports Increment Data Refresh Set chooses the begin date of the data refresh according to the conditions listed in the following table.

Table 5–10 iStore Reports Increment Data Refresh Set Begin Date Selection

Condition	Begin Date Selection
The previous increment data refresh was successful for the fact tables.	End date of the previous increment data refresh
The previous increment data refresh was not successful for the fact tables.	Begin date of the previous increment data refresh
You are running the iStore Reports Increment Data Refresh Set for the first time.	End date of the most recent successful complete data refresh

Use this procedure to prepare Storefront Reports data with the iStore Reports Increment Data Refresh Set.

Note: It is recommended that you run the iStore Reports Complete Data Refresh Set instead, since it provides completely updated, accurate data that reflects all changes since the last data refresh.

Login

Log in to Oracle Forms as the concurrent program manager.

Responsibility

iStore Concurrent Programs Responsibility

Prerequisites

You have run the iStore Reports Complete Data Refresh Set at least once.

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs Responsibility.
The Submit a New Request window opens.
2. Choose **Request Set** and click **OK**.
The Submit Request Set window opens.
3. Choose the request set **iStore Reports Increment Data Refresh Set** from the Request Set LOV.
The Submit Request Set window is populated with the concurrent programs that are in iStore Reports Increment Data Refresh Set.
4. Place your cursor in the Parameters field for iStore Reports Fact Tables Refresh.
The Parameters window opens.
5. Set the parameters as follows:
 - a. Refresh Mode: **Increment**
 - b. End Date: The ending date for the time period for which data should be pulled from the Oracle Order Capture and Oracle Order Management tables. If you leave this blank, it defaults to the current system date.Click **OK**.
The Parameters field for iStore Reports Fact Tables Refresh is populated with the parameters.
6. Place your cursor in the Parameters field for iStore Reports Materialized Views Refresh.
The Parameters window opens.
7. Verify that the Fact Refresh Mode parameter is set to **Increment**, and click **OK**.

The Parameters field for iStore Reports Materialized Views Refresh is populated with the parameter.

8. Place your cursor in the Parameters field for iStore Alert Reports.

The Parameters window opens.

9. Set the Enabled parameter to **Yes** if you want to send the Top N Orders Report and Historical Summary Report as e-mail notifications, or **No** if you do not want to trigger the notifications. Click **OK**.

The Parameters field for iStore Alert Reports is populated with the parameter.

Note: See *Oracle iStore Concepts and Procedures* for information on specifying notification recipients and message format.

10. Optional: Click **Schedule . . .** to change the time when the reports will run.

11. Click **Submit** to submit the concurrent program requests.

12. Choose **View > Requests** to see the status of your requests.

When the concurrent programs are finished, the data for the Storefront Reports is available for report queries from the Oracle iStore 11i Merchant UI.

5.10.5 Customizing Data Out Bin Drilldown Pages

You can select a time period in the Store Order Summary Data Out Bin to view the Store Product Sales, Store Customer Sales, and Store Orders bins for that time period. You can also select a customer name in the Store Customer Sales Data Out Bin to view that customer's history in Order Tracker. Additionally, you can select an order number in the Store Orders Data Out Bin to view more details about that order in Order Tracker. These drilldown options are available as links in the Data Out Bins.

The drilldown links are implemented as logical templates. The following table summarizes the logical drilldown templates for the Data Out Bins.

Table 5–11 Data Out Bin Drilldown Templates

Data Out Bin	Logical Drilldown Template
Store Order Summary	BIN_SUMMARY_DRILLDOWN
Store Customer Sales	BIN_TOP_CUSTOMER_DRILLDOWN

Table 5–11 Data Out Bin Drilldown Templates (Cont.)

Data Out Bin	Logical Drilldown Template
Store Orders	BIN_TOP_ORDER_DRILLDOWN

You can use a customized JSP for the drilldown links by mapping the desired JSP to the logical drilldown template for the appropriate Data Out Bin. Then the drilldown link from the Data Out Bin will point to the customized JSP. See [Section 6.3, "Customizing Templates"](#) for information on mapping templates in the Templates tab of the Merchant UI.

The Template Manager gets the minisite from the cookie. If you want to provide a customized JSP for a specific minisite, you must set the cookie "zm" to the minisite_id for the bin drilldown to use.

The JSP for the links takes the following parameters:

- ecr (Value = YES. Required.)
- qsd (Start book date. Required.)
- qed (End book date. Required.)
- acctnum (The customer account identifier. This parameter is supplied only for drilldown from the Store Customer Sales bin.)
- esid (The order source ID)
- qa (Query actions. The default value is "details". This parameter is supplied only for the Store Orders bin.)
- qid (The order header ID from the Store Orders bin. Optional.)

5.10.6 Storefront Reports Lookup Types

The Storefront Reports lookup types are iStore Order Facts Sources (IBE_ECR_ORDER_SOURCE) and iStore Reporting Currencies (IBE_ECR_REPORTING_CURRENCY).

The lookup iStore Order Facts Sources contains all reportable order sources. The lookup iStore Reporting Currencies contains the currency codes that are available for the Data Out Bins.

Use the following procedure to add lookup codes to these lookup types, using the AOL Lookups Form.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose **Application > Lookups > Application Object Library**.
The Application Object Library Lookups window opens.
3. Choose **View > Find**.
The Lookup Types search window opens.
4. Select the lookup type that you want to modify, and click **OK**.
The Application Object Library Lookups window is populated with the lookup codes for the lookup type.
5. In each row of the Application Object Library Lookups window, you can add a lookup code to the lookup type as follows:
 - a. In the Code field, enter the lookup code.
 - b. In the Meaning field, enter a meaning for the lookup code.
 - c. Optional: In the From and To fields, select the effective dates for the lookup code.
 - d. Check the Enabled checkbox.
6. Save the form.

5.11 Setting Up Oracle iStore 11i Customer User Registration

There are three basic Oracle iStore 11i customer user types:

- Guest users
- Registered B2C users
- Registered B2B users

Guest users (also called walk-in or unregistered users) can browse Web store catalogs and create shopping carts. However, they cannot set up a user profile, save a shopping cart, create a shopping list, submit an order, or access other Web store functionality until they register. See [Section 5.3, "Setting Up the Guest User Account"](#) for details about how Oracle iStore 11i treats a guest user, and instructions for defining the guest user account.

Registered B2C users are individual customers. When they register in a Web store, they are immediately approved and can place orders in the Web store on their own behalf.

Registered B2B users represent customer organizations. When they register in a Web store, they must be approved by you or another merchant representative before they can act as registered users in the Web store. You can give them different levels of permission, including a permission to create B2B users for their organizations who do not need merchant approval. See [Section 5.11.4, "Understanding B2B User Roles"](#) and [Section 6.9, "Creating B2B User Roles"](#) for more information.

You can allow either B2B user registration or B2C user registration, or both, in your stores. You can also set default B2B user roles and default B2B and B2C user responsibilities.

5.11.1 Setting Up Customer Registration

By default, both B2B and B2C user registration are enabled in Oracle iStore 11i. If necessary, you can disable a registration type as follows:

- **B2B user registration**—Set the profile option IBE: Use B2B Features to **No**.
- **B2C user registration**—Set the profile option IBE: Use Business to Customer Features to **No**.

Oracle iStore 11i is seeded with Oracle Application Object Library messages for both B2B user registration and B2C user registration. These messages display in the Sign In page to label the links to the B2B and B2C registration pages, if the corresponding registration types are enabled. Oracle iStore 11i is also seeded with a message to display in the Sign In page for returning users. You can change the text of the seeded messages.

The following table summarizes the seeded Sign In page messages. The PL/SQL APIs in the FND_MESSAGE package are used to retrieve and set up these messages for display.

Table 5–12 Oracle iStore 11i Sign In Page Messages

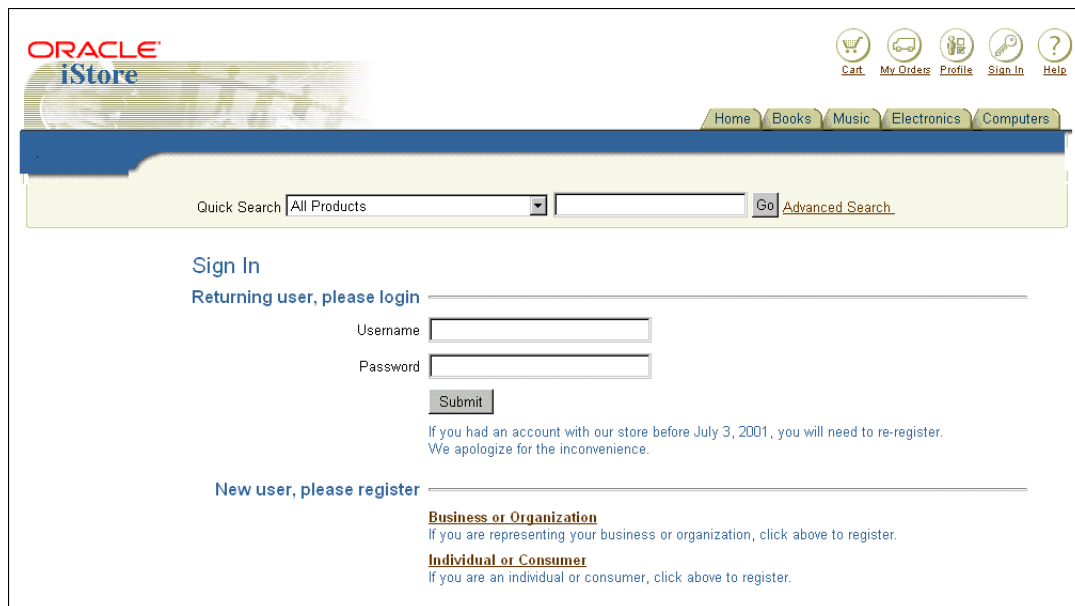
Message Function	Message Name	Seeded Text
Label for B2B registration link	IBE_PRMT_BIZ_REG_MSG	If you are representing your business or organization, click above to register.

Table 5–12 Oracle iStore 11i Sign In Page Messages (Cont.)

Message Function	Message Name	Seeded Text
Label for B2C registration link	IBE_PRMT_IND_REG_MSG	If you are an individual or consumer, click above to register.
Message for returning users	IBE_PRMT_LOGIN_CUSTOM_MSG	If you had an account with our store before July 3, 2001, you will need to re-register. We apologize for any inconvenience.

The following figure displays the Sign In page with the default seeded messages.

Figure 5–6 The Sign In Page



Use the following procedure to access the messages.

Login

Log in to Oracle Forms.

Responsibility

Application Developer

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose **Application > Messages**.
The Messages window opens.
3. Choose **View > Find**.
The Messages search window opens.
4. In the Find field, enter `IBE_PRMT%MSG` and click **Find**.
Your search results display in the Messages search window.
5. Select the message that you want to view and click **OK**.
The Messages window is populated with the selected message.

5.11.2 Setting Default Customer Responsibilities

You must specify the Oracle iStore 11i responsibility assigned by default to a new customer upon registration in a Web store. You should set a default responsibility for both new B2B and B2C customers. The default B2B customer responsibility is the Oracle CRM Technology Foundation default responsibility for business users. The default B2C customer responsibility is the Oracle CRM Technology Foundation default responsibility for end users. See *Oracle CRM Technology Foundation Concepts and Procedures* for instructions on setting Oracle CRM Technology Foundation default responsibilities.

When you set the default responsibilities, the default application ID for both user types must be 671, for Oracle iStore 11i. The responsibility ID can be `IBE_CUSTOMER` or another Oracle iStore 11i customer responsibility that you create. See *Oracle Applications System Administrator's Guide* for information on creating additional responsibilities.

5.11.3 Roles and Permissions for Oracle iStore 11i Users

Oracle iStore 11i is seeded with various roles that you can assign to different types of users. Each of these roles has a different combination of permissions, which are also seeded in Oracle iStore 11i. The names of the Oracle iStore 11i roles and permissions begin with "IBE."

You cannot use roles and permissions for B2C customers.

The following table summarizes the Oracle iStore 11i permissions.

Table 5–13 Oracle iStore 11i Permissions

Name	Description
IBE_ALLOW_PRICE_OVERRIDE	Allows the user to override prices manually
IBE_ASSIGN_SALES_CREDITS	Allows a user to assign sales credits
IBE_BILLTO_ANY_ACCOUNT	Allows a user to search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer
IBE_CHANGE_BILLTO_CONTACT	Allows a user to change the bill-to contact from the default (if any) bill-to contact
IBE_CHANGE_BILLTO_CUSTOMER	Allows a user to change the bill-to customer from the default bill-to customer
IBE_CHANGE_SHIPTO_CONTACT	Allows a user to change the ship-to contact from the default (if any) ship-to contact
IBE_CHANGE_SHIPTO_CUSTOMER	Allows a user to change the ship-to customer from the default ship-to customer
IBE_CREATE_ADDRESS	Reserved for future use.
IBE_CREATE_BILLTO_CONTACT	Allows the user to create a new contact for the bill-to customer who will have a bill-to relationship with the bill-to customer
IBE_CREATE_BILLTO_CONTACT_ADDRESS	Allows the user to create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact
IBE_CREATE_BILLTO_CUSTOMER	Allows a user to create a new customer with a billing relationship to the sold-to customer
IBE_CREATE_BILLTO_CUSTOMER_ADDRESS	Allows the user to create a new address associated with the bill-to customer which will have a bill-to relationship with the bill-to customer

Table 5–13 Oracle iStore 11i Permissions (Cont.)

Name	Description
IBE_CREATE_ORDER	Allows a user to submit a quote or cart as an order
IBE_CREATE_PAYMENT_INSTRUMENT	Reserved for future use.
IBE_CREATE_SHIPTO_CONTACT	Allows the user to create a new contact for the ship-to customer who will have a ship-to relationship with the ship-to customer
IBE_CREATE_SHIPTO_CONTACT_ADDRESS	Allows the user to create a new address associated with the ship-to contact which will have a ship-to relationship with the ship-to contact
IBE_CREATE_SHIPTO_CUSTOMER	Allows a user to create a new customer with a shipping relationship to the sold-to customer
IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS	Allows the user to create a new address associated with the ship-to customer which will have a ship-to relationship with the ship-to customer
IBE_CREATE_SOLDTO_CUSTOMER	Allows a user to create a new customer in the context of assigning a sold-to customer during quote creation
IBE_MODIFY_CART	Reserved for future use.
IBE_MODIFY_ORDER	Reserved for future use.
IBE_SHIPTO_ANY_ACCOUNT	Allows a user to search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer
IBE_USER_ADMIN	Allows a user to create additional users for his or her organization
IBE_USE_ATTACHMENT	Allows the user to use attachments
IBE_USE_PRICING_AGREEMENT	Allows the user to use pricing agreements
IBE_VIEW_ADDRESS	Reserved for future use.
IBE_VIEW_CUST_WITHOUT_ACCOUNT	Allows a user to search on and retrieve existing customers without an account

Table 5–13 Oracle iStore 11i Permissions (Cont.)

Name	Description
IBE_VIEW_INVOICE	Allows a user to view invoices related to the entire organization, through My Orders. Oracle iStore 11i checks this permission only if the profile option IBE: Use Auth Permissions in Order Tracker is set to Yes .
IBE_VIEW_ORDER	Allows a user to view orders placed on behalf of the entire organization, through My Orders. Oracle iStore 11i checks this permission only if the profile option IBE: Use Auth Permissions in Order Tracker is set to Yes .
IBE_VIEW_PAYMENT	Allows a user to view payments related to the entire organization, through My Orders. Oracle iStore 11i checks this permission only if the profile option IBE: Use Auth Permissions in Order Tracker is set to Yes .
IBE_VIEW_PAYMENT_INSTRUMENT	Reserved for future use.

The following table lists the seeded Oracle iStore 11i user roles and shows the permissions that are assigned by default to each role.

Table 5–14 Oracle iStore 11i User Roles

Name	Description	Default Permissions
IBE_BUSINESS_USER_ROLE	Business User Role	IBE_CREATE_ADDRESS IBE_CREATE_BILLTO_CONTACT_ADDRESS IBE_CREATE_ORDER IBE_CREATE_PAYMENT_INSTRUMENT IBE_CREATE_SHIPTO_CONTACT_ADDRESS IBE_MODIFY_CART IBE_MODIFY_ORDER IBE_VIEW_ADDRESS IBE_VIEW_INVOICE IBE_VIEW_ORDER IBE_VIEW_PAYMENT IBE_VIEW_PAYMENT_INSTRUMENT
IBE_PRIMARY_USER_ROLE	Primary User Role	IBE_CREATE_ADDRESS IBE_CREATE_BILLTO_CONTACT_ADDRESS IBE_CREATE_ORDER IBE_CREATE_PAYMENT_INSTRUMENT IBE_CREATE_SHIPTO_CONTACT_ADDRESS IBE_MODIFY_CART IBE_MODIFY_ORDER IBE_USER_ADMIN IBE_VIEW_ADDRESS IBE_VIEW_INVOICE IBE_VIEW_ORDER IBE_VIEW_PAYMENT IBE_VIEW_PAYMENT_INSTRUMENT

Table 5–14 Oracle iStore 11i User Roles (Cont.)

Name	Description	Default Permissions
IBE_RESELLER_ROLE	Reseller Role	IBE_CHANGE_SHIPTO_CONTACT IBE_CHANGE_SHIPTO_CUSTOMER IBE_CREATE_ADDRESS IBE_CREATE_BILLTO_CONTACT_ADDRESS IBE_CREATE_ORDER IBE_CREATE_PAYMENT_INSTRUMENT IBE_CREATE_SHIPTO_CONTACT IBE_CREATE_SHIPTO_CONTACT_ADDRESS IBE_CREATE_SHIPTO_CUSTOMER IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS IBE_MODIFY_CART IBE_MODIFY_ORDER IBE_SHIPTO_ANY_ACCOUNT IBE_USE_ATTACHMENT IBE_USE_PRICING_AGREEMENT IBE_VIEW_ADDRESS IBE_VIEW_INVOICE IBE_VIEW_ORDER IBE_VIEW_PAYMENT IBE_VIEW_PAYMENT_INSTRUMENT

IBE_BUSINESS_USER_ROLE and IBE_PRIMARY_USER_ROLE are appropriate for assignment to B2B customer users.

Note: The B2B role for previous releases, IBE_DEFAULT_ROLE, is also seeded in Oracle iStore 11i with identical permissions to IBE_BUSINESS_USER_ROLE, for backward compatibility.

IBE_RESELLER_ROLE has quote creation permissions, but does not allow the quote creator to view all customer accounts in your records, bill to anyone other than the sold-to customer, or sell to customers who are not in your records. It is appropriate for assignment to resellers and others who sell your products but are not internal to your organization.

See *Oracle HTML Quoting Implementation Guide* for more information about the Oracle HTML Quoting role IBE_SALESREP_ROLE, which also uses Oracle iStore 11i permissions.

5.11.4 Understanding B2B User Roles

Registered B2B users represent customer organizations. When they register in a Web store, they must be approved by you or another merchant representative before they can act as registered users in the store. You can also activate automatic approval of B2B users by setting the profile option IBE: Use Business User Auto Approval to **Yes**.

When you approve B2B users, you can assign them specific B2B roles that determine the permissions they have in the stores. You can use the seeded Oracle iStore 11i roles or create new B2B roles with various combinations of the Oracle iStore 11i permissions.

If you do not specify a role for an approved B2B user, he or she receives the default B2B user roles. See [Section 5.11.5, "Setting Default Customer Roles for B2B Users"](#) for instructions on setting the default B2B user roles.

Seeded B2B Role Values

- IBE_BUSINESS_USER_ROLE
- IBE_PRIMARY_USER_ROLE

The IBE_PRIMARY_USER_ROLE has permissions identical to those of IBE_BUSINESS_USER_ROLE, with the addition of the IBE_USER_ADMIN permission. See [Section 5.11.3, "Roles and Permissions for Oracle iStore 11i Users"](#) for a list of these permissions.

If you give a B2B user a role with the IBE_USER_ADMIN permission, the B2B user can create more users for his or her organization in the Web store without the merchant's approval. This B2B user can also define new B2B user roles with unique sets of permissions. When B2B administrative users create other B2B users for their organizations, they must assign roles to the new users. The B2B users created by B2B administrative users do not automatically receive the default B2B user role.

When a B2B user logs in, links to the User Management and Role Management pages are available in the Profile page.

Figure 5–7 The B2B User's Profile Page

The screenshot displays the Oracle iStore user profile page for a B2B user. At the top, the Oracle iStore logo is on the left, and navigation icons for Cart, My Orders, Profile, Sign Out, and Help are on the right. Below these are category tabs: Home, Books, Music, Electronics, and Computers. A blue navigation bar contains links for User Information, Express Checkout Preferences, User Management, and Role Management. A search bar is present with 'All Products' selected in a dropdown menu and a 'Go' button. The main content area is titled 'Personal Information' and includes a sidebar with links for Change Password, Address Book, Payment Book, and Preferences. The form fields are as follows: First Name (B2B), Middle Name (empty), Last Name (User), and Email (b2buser@samplecorp.c). A checkbox is checked for receiving promotional information. Phone number fields for Daytime, Evening, and Fax are also present, each with area, number, and extension boxes. An 'Update' button is located at the bottom of the form.

The User Management page allows B2B administrative users to create B2B users for their organizations who do not need approval from the merchant, and to specify roles for these users.

Note: A B2B administrative user can view all B2B users for his or her organization, even if he or she did not create them. However, the B2B administrative user sees role assignments only for the roles that he or she has. If a B2B administrative user views B2B users in the User Management page who have roles that he or she does not have, these role assignments will not appear in the B2B users' role details. Instead, IBE_DEFAULT_ROLE is checked as the role assignment.

Figure 5–8 The B2B Administrative User's User Management Page

The screenshot displays the Oracle iStore user management interface. At the top, there is the Oracle iStore logo and navigation icons for Cart, My Orders, Profile, Sign Out, and Help. Below this is a category navigation bar with Home, Books, Music, Electronics, and Computers. A secondary navigation bar includes User Information, Express Checkout Preferences, User Management (which is highlighted), and Role Management. A search bar is present with a dropdown menu set to 'All Products' and a 'Go' button, with a link to 'Advanced Search'.

The main content area is titled 'Users' and contains a table with the following data:

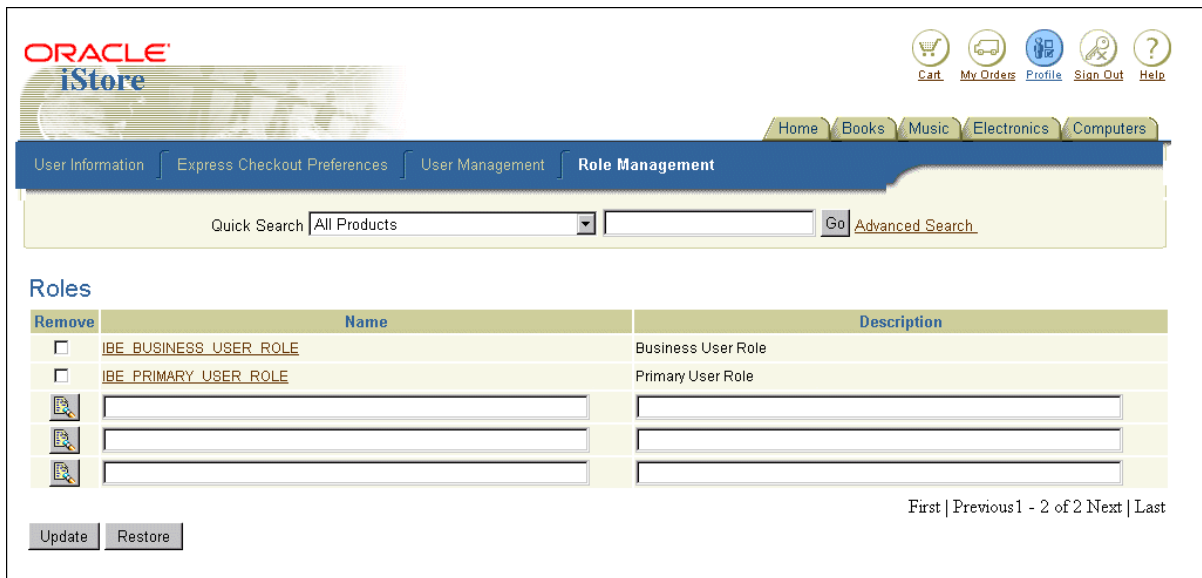
First Name	Middle Name	Last Name	Email	Username	Password
B2B		User	b2buser@samplecorp.com	A_B2B_USER	<input type="password"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="password"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="password"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="password"/>

Below the table, there is a pagination control: [First](#) | [Previous](#) 1 - 1 of 1 [Next](#) | [Last](#). An 'Update' button is located at the bottom left of the table area.

The Role Management page allows B2B administrative users to view available roles and define new roles. However, they cannot modify or delete any roles, even the ones that they created.

Note: In the Role Management page, the B2B administrative users can see the Oracle iStore 11i seeded B2B roles that are assigned to them. Although there are Remove checkboxes for these seeded roles, the B2B administrative users should not delete these roles. Deleting the roles in the Role Management page will also delete them from all other Oracle iStore 11i B2B users' accounts.

Figure 5–9 The B2B Administrative User's Role Management Page



5.11.5 Setting Default Customer Roles for B2B Users

You must specify the role assigned by default to new B2B customers. This role is the Oracle CRM Technology Foundation default role for business users. See *Oracle CRM Technology Foundation Concepts and Procedures* for instructions on setting this Oracle CRM Technology Foundation default role. You cannot set up a default role for new Oracle iStore 11i B2C customers.

You can select either of the seeded B2B user roles, IBE_BUSINESS_USER_ROLE or IBE_PRIMARY_USER_ROLE, as the default role. You can also select a B2B user role that you create yourself, as described in [Section 6.9, "Creating B2B User Roles"](#).

When B2B administrative users create other B2B users for their organizations, they must assign a role to them in the User Management page within their Profiles. The B2B users created by B2B administrative users do not automatically receive the Oracle CRM Technology Foundation default role for business users.

5.12 Setting Profile Options for the Customer UI

You must set Oracle iStore (IBE), Oracle Order Capture (ASO), Oracle Order Management (OM), and Multiple Organization (MO) profile options to define how the Oracle iStore 11i Customer UI will work. You must also activate debug logging through Oracle CRM Technology Foundation.

See [Appendix A, "Profile Options"](#) for profile option descriptions and setup procedures. [Appendix A, "Profile Options"](#) also lists required and recommended values for some profile options.

5.12.1 Setting Oracle iStore 11i (IBE) Profile Options for the Customer UI

Set the following mandatory IBE profile options to configure the Customer UI:

- IBE: Pricing Event—Before Shopping Cart
- IBE: Pricing Event for Shopping Cart
- IBE: Request Type to get a Price

You can also set the optional IBE profile options for the Customer UI if you do not want to use the default settings. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for IBE profile option names and descriptions. The IBE profile options impact the following aspects of the Customer UI:

- Catalog—Sections
- Catalog—Items
- Catalog—Search
- Shopping Cart
- Express Checkout
- Postsales
- Notifications
- Caching
- Functionality

5.12.2 Setting Oracle Order Capture (ASO) Profile Options

Set the following ASO profile options to configure the Customer UI:

- ASO: Credit Card Authorization
- ASO: Default Order State
- ASO: Default Order Type
- ASO: Default Salesrep
- ASO: Enable Use Contracts
- ASO: OM Defaulting
- ASO: Product Organization
- ASO: Quote Conversion Type
- ASO: Reservation Level
- ASO: Validate Salesrep

See [Section A.8, "Oracle Order Capture \(ASO\) Profile Options"](#) for more information.

5.12.3 Setting Oracle Order Management (OM) Profile Options

If you have set the IBE: Debug profile option to **Yes** for a user, verify or set the profile option OM: Debug Log Directory at site level to a directory that is writable by the database server. Oracle iStore 11i Customer UI user-specific logs for the PL/SQL layer are written in this directory.

See [Section 8.1, "Setting Up User-Level Logging"](#) and [Section A.9, "Oracle Order Management \(OM\) Profile Options"](#) for more information.

5.12.4 Setting Multiple Organization (MO) Profile Options

Set the MO: Operating Unit profile option to the operating unit at the IBE_CUSTOMER responsibility level.

See [Section A.10, "Multiple Organization \(MO\) Profile Options"](#) for more information.

Setting MO Profile Options for Multiple Operating Units

For a multiple operating unit environment, you must create a separate IBE customer responsibility for each operating unit in Oracle Forms. You can use the seeded responsibility IBE_CUSTOMER as one of these responsibilities. Each customer name is assigned at least one such responsibility when the name is approved.

For each of the customer responsibilities, set the profile option MO: Operating Unit to its respective operating unit.

When a customer enters a Web store, Oracle iStore 11*i* notes the customer's responsibility and the operating unit to which it is assigned, then restricts the customer to the items in the Inventory Organization that is associated with the operating unit. Oracle iStore 11*i* accomplishes this by retrieving the Inventory Organization ID for the current user responsibility's operating unit from the OE_SYSTEM_PARAMETERS_ALL table. Use Oracle Order Management to associate Inventory Organization IDs with operating units.

5.12.5 Setting Site-Level Profile Options

Set the Sequential Numbering profile option at site level to configure the Customer UI.

See [Section A.14, "Site-Level Profile Options"](#) for more information.

Optional Implementation Tasks

This chapter describes optional implementation tasks for Oracle iStore 11*i*. You can use the procedures in this chapter to customize the appearance and functionality of Oracle iStore 11*i* specialty stores. Topics include:

- [Customizing Multimedia](#)
- [Defining Multimedia Components](#)
- [Customizing Templates](#)
- [Defining Display Styles](#)
- [Creating Product Relationships](#)
- [Customizing Product Presentation at the Category Level](#)
- [Customizing Product Presentation at the Item Level](#)
- [Customizing the Shopping Cart](#)
- [Creating B2B User Roles](#)
- [Managing the Cache](#)

Note: When using the Oracle iStore 11*i* Merchant UI, ensure that cookies are enabled. See the relevant browser documentation for information on enabling cookies.

6.1 Customizing Multimedia

Multimedia consist of files such as graphics, text, audio, and video, that are used to present content on a Web page to your customer.

The Oracle iStore 11*i* multimedia catalog enables you to make customized multimedia available for use in your stores and organize the multimedia according to specialty stores and languages.

To customize the appearance of your store pages, you must perform these tasks:

- Create proprietary media source files.
- Choose Oracle iStore 11*i* multimedia names.
- Catalog Oracle iStore 11*i* multimedia and assign multimedia source files to each multimedia object.

6.1.1 Creating Media Source Files

Creating your own media source files for use in your store pages can enhance the appearance of your store to serve better the store's purposes.

Types of media source files can include small or large graphics, such as GIF files, descriptive text, audio, and video. You can create these files through media authoring programs.

You should place all media source files in the file system's `OA_MEDIA` directory if the profile option `IBE: Use Database for Media Storage` is set to **No**, or upload the files to the database from the file system or your local directory if the profile option is set to **Yes**.

If you are using the database for media storage, and the Display Manager calls a media source file that exists in your file system but not in the database, then the Display Manager can still retrieve the source file from the file system.

You can use the following procedure to migrate all of the media source files in your file system to the database. You can run this procedure whenever necessary.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

`IBE_ADMINISTRATOR`

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. Navigate to:
`http://<host>:<apache port>/OA_HTML/ibemdmgt.jsp`
3. The Multimedia Migration page opens, with the View All Media in File System subtab listing the Oracle iStore 11*i* media source files that are in the file system's OA_MEDIA directory.
4. Optional: View a list of the Oracle iStore 11*i* media source files that are in the database by clicking **View All Media in Database**.
5. In the View All Media in File System subtab, click **Migrate** to begin migrating all of the media source files in the file system to the database.

The Migration in Process page opens. This page refreshes every two seconds with an update of the migration.
6. Optional: You can stop the migration at any time before it completes by clicking **Stop** in the Migration in Process page.
7. When the migration completes, or when you stop it, the Migration Summary Page opens.
8. Optional: To restart the migration, click **Restart** in the Migration Summary Page.

Note: You can close your browser after you start the migration.

6.1.2 Naming Multimedia

Each multimedia object that you list in the Oracle iStore 11i multimedia catalog can have a number of media source files assigned to it. Each of these source files can be assigned to combinations of specialty stores and languages. Each multimedia object is in turn available for assignment to multimedia components, which are called by templates to determine which multimedia object appears on a given store page.

The multimedia name is the catalog name that is easy to communicate and use when planning your page designs. An example is **CompanyLogo**. This name can be translated for convenience in store administration.

Every multimedia name is given a programmatic access name that is short, unique, and not as descriptive. The programmatic access name is used to display that multimedia file in your Web page, if you want to refer to it directly in the template. An example is **clogo**. This name is not translated.

The multimedia name and programmatic access name represent several source files. You assign each source file to combinations of specialty stores and languages. The following table lists examples of file names for the multimedia name **CompanyLogo**.

Table 6–1 Sample Media File Names for the Multimedia Name CompanyLogo

Multimedia Name	Programmatic Access Name	File	Specialty Store	Language
CompanyLogo	clogo	clog1f.gif	Specialty Store 1	French
CompanyLogo	clogo	clog1e.gif	Specialty Store 1	English
CompanyLogo	clogo	clog2f.gif	Specialty Store 2	French
CompanyLogo	clogo	clog2e.gif	Specialty Store 2	English

In this example, if a French customer enters Specialty Store 1, the store displays the logo file clog1f.gif. An English customer entering the same specialty store sees clog1e.gif instead.

To see the multimedia which have been seeded into Oracle iStore 11i and are available for use in your store, enter the Multimedia tab. This page lists the existing multimedia and their programmatic access names, keywords, descriptions, and default source files for all specialty stores and languages. Click individual multimedia names for more detail. Choose **View All Mappings** from within an individual detail page to display each source file name and its relationship to specialty stores and languages.

6.1.3 Cataloging Multimedia

Use this procedure to catalog an Oracle iStore 11i multimedia object and assign media source files to the multimedia object name.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- Check whether you are storing your media source files in the file system or the database. See [Section 6.1.1, "Creating Media Source Files"](#) for details.
- The default language is defined.
- At least one specialty store exists.

Steps

1. Launch the Merchant UI.
2. In the Multimedia tab, search for multimedia that are already cataloged and available to use in your store.

The Multimedia page lists the multimedia that match your search criteria along with their programmatic access names, keywords, descriptions, and the default source files to use for all specialty stores and languages.

3. Click **Create**.

The Multimedia Details page opens.

Figure 6–1 The Multimedia Details Page

ORACLE
Oracle Applications

Profile Sign Out Help

Setup Category Hierarchy Relationship Product Templates **Multimedia** Cache Reports

Multimedia Details

Information and Source Files

*Name Displays

*Programmatic Access Name Keywords

Description

4. In the Name field, define the multimedia name. Choose a name that is representative of the multimedia object's characteristics and purpose.
5. In the Programmatic Access Name field, define the programmatic access name, which is the name by which the multimedia object will be accessed from the template. Do not duplicate other programmatic access names.
6. In the Displays pull-down menu, specify if this multimedia object will be available for product- and category-level (**CATEGORY**) or section-level (**SECTION**) presentation, or for page features not specifically associated with catalog presentation (**OTHERS**).
7. Optional: In the Keywords field, enter keywords for the multimedia. Entering keywords enables a keyword-based search for this multimedia object when assigning a multimedia object name to a multimedia component.
8. Optional: In the Description field, enter a description of the multimedia. Entering a description enables a description-based search for this multimedia object when assigning a multimedia object name to a multimedia component.
9. Click **Update**. The Source Files used for Specialty Stores and Languages section appears in the Multimedia Details page.

10. If you are storing your media source files in the file system, then provide a source file for the multimedia object using the following steps:
 - a. In the Add Source File field of the Multimedia Details page, define a media source file by entering the location of the file relative to the `OA_MEDIA` directory. For example, enter the GIF file `product.gif` from the `OA_MEDIA` directory as `/OA_MEDIA/product.gif`.
 - b. Click **Add**.

The Source File Details section for the media source file appears in the Multimedia Details page.
11. If you are storing your media source files in the database and want to search for a source file in the database, follow these steps:
 - a. In the Multimedia Details page, click **Search**.

A media source file search interface appears in the Multimedia Details page.
 - b. From the Search a multimedia source file pull-down menu, select the parameter on which you want to search. In the text field, enter the search criteria, using the wildcard character `%` if necessary.
 - c. Click **Go**. The multimedia source file search results appear on the page.
 - d. Highlight the radio button next to the source file that you want to assign to the multimedia object, and click **Continue**.

The Source File Details section for the media source file appears in the Multimedia Details page.
12. If you are storing your media source files in the database and want to upload a source file from your local directory, follow these steps:
 - a. In the Multimedia Details page, click **Upload**.

The Upload Source File section appears in the Multimedia Details page.
 - b. Click **Browse** to search for a source file in your local directory. When you select the file, the Source File Name field is populated with the file name.
 - c. Optional: In the Keywords field, enter keywords for the media source file. Entering keywords enables a keyword-based search for this media source file when assigning a source file to a multimedia object.

- d. Optional: In the Description field, enter a description of the media source file. Entering a description enables a description-based search for this media source file when assigning a source file to a multimedia object.

- e. Click **Upload** to upload the file to the database.

The Source File Details section for the media source file appears in the Multimedia Details page.

- 13. In the Source File Details section, add each specialty store and language where you want the new source file to appear.
- 14. Optional: Check the checkbox in the Remove column next to any specialty store-language mapping that you want to delete.
- 15. Click **Update**. The relationships between the multimedia name, source file, specialty stores, and languages are saved.

The Multimedia Details page opens, listing the newly assigned source file.

- 16. In the Multimedia Details page, highlight the radio button in the Show as Default column next to the source file name that you want the multimedia object to call when there is no specific source file mapping for the user's specialty store and display language. Click **Update** to save your changes.
- 17. Optional: In the Multimedia Details page, check the checkbox in the Remove column to remove a source file from the multimedia object, and click **Update**.
- 18. Optional: Choose **View All Mappings** in the Multimedia Details page.

The View All Mappings page displays each source file name and its relationship to specialty stores and languages. This step is highly recommended.
- 19. Optional: In the Multimedia Details page or the View All Mappings page, click on a source file name to map it to more specialty store-language combinations.

6.2 Defining Multimedia Components

Multimedia components define the types of multimedia objects available for display on a Web page, such as an image of a certain size, short text description, or a ten-second audio file. They enable assignment of default and specific multimedia objects at the product, category, section, and store levels. Multimedia components are called by the store Web page templates to determine which multimedia appear on a given store page.

When you catalog a multimedia component, you choose a default multimedia object that is active at store level. In the Hierarchy tab, there are multimedia

component fields where you can choose a multimedia object name to correspond with each component for each section.

In the Product and Category tabs, there are also multimedia component fields where you can choose a multimedia object name to correspond with each component for the product or category. Pages associated with the product or category will use this multimedia object instead of the store-level multimedia.

If no multimedia name is associated with a multimedia component for either product or category, then the multimedia object chosen for the product or category's parent section in the Hierarchy tab appears on pages associated with the product or category that use the multimedia component. If no specific multimedia name has been chosen for the section's multimedia component, then the store-level default multimedia object appears.

Seeded Values

- STORE_PRODUCT_LARGE_IMAGE
- STORE_PRODUCT_SMALL_IMAGE
- STORE_SECTION_SMALL_IMAGE

You can view the seeded values in the Multimedia Components tab. This page lists existing multimedia components and their programmatic access names, descriptions, default multimedia, and default source files.

Use this procedure to catalog multimedia components that you want to assign to sections, categories, or products.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

Define the types of media objects you want to use on your store Web pages.

You can select a default multimedia object name for a multimedia component only after you have cataloged multimedia. If the default information is unavailable, you can continue the setup and select a default multimedia name at a later time.

However, if a multimedia association is requested for any product, category, or section with that multimedia component, and there is no product-specific,

category-specific, or section-specific association for the multimedia component, Oracle iStore 11i uses the default multimedia object name defined at the store level.

To avoid the error, you can also use the multimedia component's seeded values, as listed in the Multimedia Components tab.

Steps

1. Launch the Merchant UI.
2. In the Setup tab, choose **Multimedia Components**.

The Multimedia Components page displays a list of existing multimedia components and each component's default multimedia name. It also lists the default media source file for each multimedia name.

3. Click **Create**.

The Multimedia Component Details page opens.

Figure 6–2 The Multimedia Component Details Page

The screenshot shows the Oracle Applications interface. At the top left is the Oracle logo and 'Oracle Applications' text. On the top right are icons for Profile, Sign Out, and Help. Below this is a navigation bar with tabs for Setup, Category, Hierarchy, Relationship, Product, Templates, Multimedia, Cache, and Reports. The Multimedia tab is selected. Underneath, there are sub-tabs for Specialty Stores, Multimedia Components, and Display Styles. The main content area is titled 'Multimedia Component Details' and contains the following fields:

- Name:
- *Programmatic Access Name:
- Description:
- Default Multimedia: Go

At the bottom of the form are two buttons: Update and Restore.

4. In the Name field, define the multimedia component name.
5. In the Programmatic Access Name field, define the programmatic access name. This name is called by the templates for the store Web pages that use this multimedia component.

6. Optional: In the description field, enter a description of the multimedia component. Entering a description enables a description-based search for this multimedia component.
7. In the Default Multimedia field, click **Go** to select a default multimedia name for this component. This default multimedia object will appear in pages associated with this multimedia component when the pages' products, categories, or sections have no specific multimedia assignments for this component.
8. Click **Update**.
The multimedia component information is saved.

6.3 Customizing Templates

Oracle iStore 11i Web page designs use common components, such as section tabs and browse bins. Each component is based on a template, and the templates are combined to create a store Web page. The templates control the appearance of the store through the use of JavaServer Pages™ (JSP™), which combine Application Programming Interfaces (API) to call dynamic data and HTML to present static data.

Oracle iStore 11i comes packaged with a complete set of JSP templates needed to run the store. If you want to expand the functionality of the store Web pages or customize the pre-packaged templates, then you need to identify the flow of the application and the JSP templates needed to implement the flow. See *Oracle iStore Concepts and Procedures* for more information.

To customize templates for your store, perform the following tasks after planning your Web page designs:

- Create template source files for pages and for blocks within pages using a Web authoring application.
- Choose Oracle iStore 11i template names.
- Catalog Oracle iStore 11i template names and assign template source files to each template name.

6.3.1 Creating Template Source Files

You can create new JSP templates to replace or add to the Oracle iStore 11i seeded templates. Different physical JSP templates can be used at run-time based on the language and specialty store.

Note: It is recommended that you use Oracle JDeveloper to create and modify JSP templates. Although you can create JSPs with any HTML or text editor, Oracle JDeveloper also enables you to debug the code.

The major skills required to create and modify templates are HTML and JSP. JSP embeds Java language methods in the HTML content to generate dynamic content on the Web page. The structure of a JSP page is demonstrated in the following HTML example.

```
<HTML>
<% import="oracle.apps.ibe.util.*" %>
....
....
<P> Name : <%= customer.getName(12334) %>
    Where customer is a Java class on the server and getName is a public method
    in the class to retrieve the customer Name.

<P> Picture: <IMG SRC = "<%= customer.getPict(12334) %>">
    This step can retrieve the image file name from the customer Java class on the
    server.

....
</HTML>
```

The default UNIX directory for JSP source code is `$COMMON_TOP/html`. All `ibem*.jsp` templates are for the Merchant UI, and all `ibeC*.jsp` templates are for the Customer UI. New templates should also be placed in the `$COMMON_TOP/html` directory. Changes made to the JSPs may not appear immediately on the Web stores, since you must reboot the Apache server before changes take effect.

Deleting the server cache has the same effect as rebooting the Apache server. The server cache is located in the UNIX directory `$COMMON_TOP/html/_pages/oa_html`. This cache directory contains `.java` and `.class` files that are generated after the JSP that has been called is translated. These can be safely deleted and will be regenerated when the JSP is invoked through an HTTP request.

After creating or modifying templates, you can pre-compile them to check for compilation errors and to increase the speed of the initial loading.

Note: Sometimes it is not immediately obvious that templates referred to in the JSP code are in fact JSPs themselves. To find the JSP name of a template, search in the Template tab of the Merchant UI for the template name referenced in the code. The JSP name is included in the template listing. This JSP can then be modified to suit the requirements of the project.

JSP Naming Conventions

Modify JSP templates only after renaming them first. All modified JSPs should follow a standard naming convention, e.g., name of project-name of jsp.jsp

This will make future Oracle iStore 11i upgrades less problematic.

Note: Never change an original JSP. To modify a JSP, make a copy of the original JSP and modify only the copy. If a bug occurs, compare the JSP copy to the JSP original.

Cascading Style Sheets (CSS)

Oracle iStore 11i uses the logical template name STORE_STYLE_SHEET in the JSP template files to call the Cascading Style Sheet (CSS) that determines fonts, sizes, colors, and other elements of look and feel. As with JSP templates, you can map different CSS source files to the same logical template name for different specialty stores and languages.

Oracle iStore 11i comes with a single CSS called jtfucss.css, and the STORE_STYLE_SHEET is seeded with this CSS as the default source file for all sites and languages. The CSS resides in the \$COMMON_TOP/html directory and can be modified using an HTML editor. Place any other style sheets that you create in the same directory.

Modifying the Seeded Template Source Files

The Oracle iStore 11i Customer UI page is sectioned into various information containers, also referred to as bins or place holders. These bins hold the content-specific information and display it logically on the page. You can modify the bins' text and layout to change the Customer UI.

Changing the Text in Bins The text in the bins (for example, Welcome Message Bin, Shopping Cart Bin, Section Tree Bin) comes from the Oracle Application Object Library Messages that are seeded in the FND_NEW_MESSAGES table. Use the following procedure to change the text in the bins:

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose **Application > Messages**.
The Messages window opens.
3. Choose **View > Find**.
The Messages search window opens.
4. In the Find field, enter `IBE%` and click **Find**.
Your search results display in the Messages search window.
5. Select the message that you want to modify and click **OK**.
The Messages window is populated with the selected message.
6. Modify the message to change the text in the bin where it appears.
You can find a specific message name by viewing the JSP file that displays it.

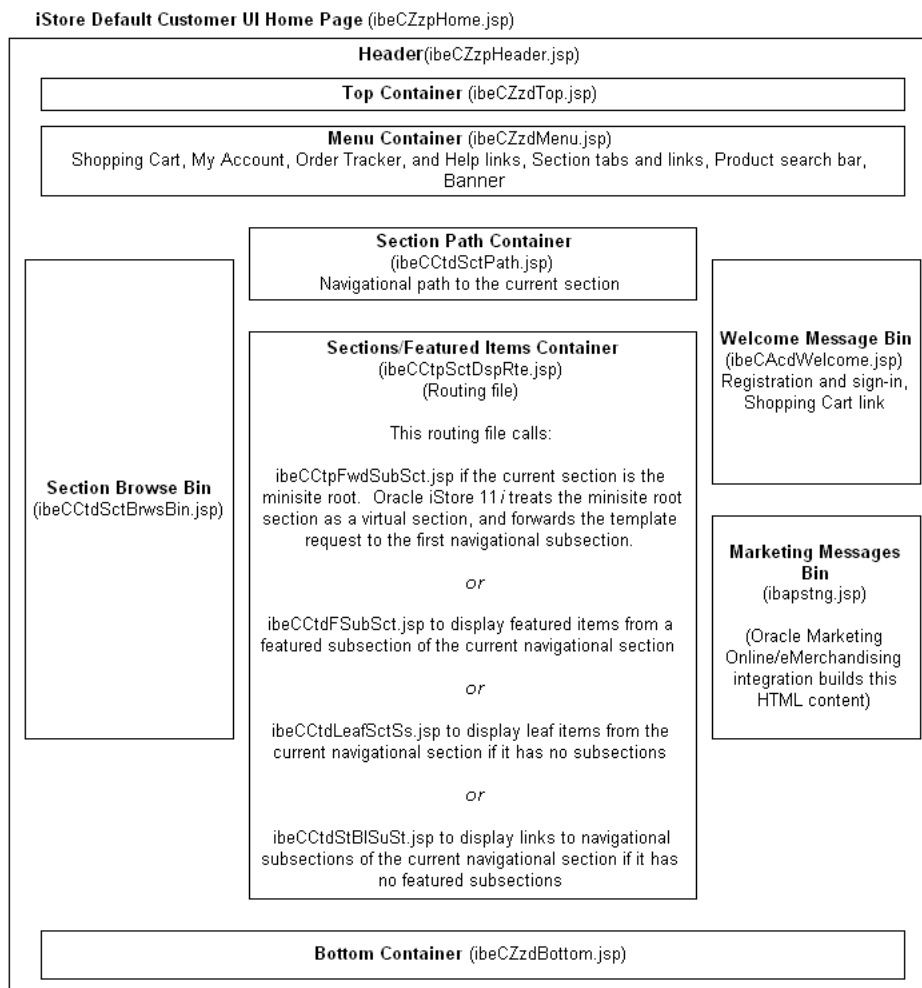
Changing the Layout of Bins You can change the bin placement or remove a bin from the Customer UI in the following ways:

- Change the profile options listed in [Section A.6.1, "IBE Profile Options for the Catalog"](#).
- Associate JSPs with the seeded logical bin templates listed in [Table 14-1, "Logical Template Names for Bins"](#).
- Modify the home page `ibeCZzpHome.jsp` and other corresponding JSP files.

To verify that the home page is `ibeCZzpHome.jsp`, launch the Merchant UI, enter the Templates tab, and search the template catalog for Name = STORE_HOME. The default source file listed should be `ibeCZzpHome.jsp`.

Note: Be careful when making these changes, which affect the storefronts.

The following diagram shows the layout of the bins on the default store page.

Figure 6–3 Bin Layout on the Default Store Page

API Documentation

To make advanced changes to the Customer UI page displays, beyond bin layout and text messages, you must have complete knowledge of the APIs being called from the JSP template source file. The APIs are the key for displaying data on the

store pages. These are the application objects and beans. Customers and users cannot modify these class files.

For public class API documentation, see *Oracle iStore API Reference Guide*.

6.3.2 Naming Templates

Cataloging templates involves setting up Oracle iStore 11i template objects with names and descriptions and specifying the different physical JSP templates to be used at run-time based on language and specialty store. These template objects can be additions to, or replacements for, the Oracle iStore 11i seeded template objects.

The template name is the catalog name that is easy to communicate and use when planning your page designs. An example is **ProductHome**. Template names may be translated for convenience in store administration.

Every template name also has a programmatic access name that is short, unique, and not as descriptive. The programmatic access name is inserted into your Web page or template. An example is **phome**. Programmatic access names are not translated.

The template name and programmatic access name represent several physical template source files. Each physical file can be assigned to combinations of specialty stores and languages. When Oracle iStore 11i retrieves an assigned template name, the template source file is determined by the mapping of the template name to the current specialty store and language.

The Display Manager is the class that implements Oracle iStore 11i's Template Manager. The Template Manager maintains a mapping from a logical name or access name of a media object to a physical name on the file system. For example, STORE_HOME (logical) maps to ibeCZzpHome.jsp (physical). When the Web store is active, the Display Manager determines what physical file to call from the logical template or multimedia component name, based on the specialty store and language.

The following table shows examples of file names for **ProductHome**.

Table 6–2 Sample JSP File Names for the Template Name ProductHome

Template Name	Programmatic Access Name	File	Specialty Store	Language
ProductHome	phome	hom1f.jsp	Specialty Store 1	French
ProductHome	phome	hom1e.jsp	Specialty Store 1	English
ProductHome	phome	hom2f.jsp	Specialty Store 2	French

Table 6–2 Sample JSP File Names for the Template Name ProductHome (Cont.)

Template Name	Programmatic Access Name	File	Specialty Store	Language
ProductHome	phome	hom2e.jsp	Specialty Store 2	English

In this example, if a French customer enters Specialty Store 1, the store displays the home page file `hom1f.jsp`. An English customer in the same Specialty Store 1 sees `hom1e.jsp` instead.

Assigning Templates to Presentation Levels

Templates can also be assigned to products, categories, and sections. You can specify these assignments through the Display Style options available in the Product, Category, and Hierarchy tabs, after setting up the Display Styles catalog. See [Section 6.4, "Defining Display Styles"](#) for details.

You can indicate that the template associated with a given display style will be used when displaying a product. You can also indicate at the section level the display style to use for displaying products that belong to that section. Oracle iStore 11*i* uses the following process to determine which template to use when displaying a product according to a given display style.

1. For a given display style, Oracle iStore 11*i* uses the template that you associated with the product.
2. If no template is associated at the product level, Oracle iStore 11*i* retrieves the template associated with the product's primary display category.
3. If no template is associated with the product or category, Oracle iStore 11*i* retrieves the default template for the display style.

6.3.3 Cataloging Templates

You can catalog templates using the Template Manager functionality, accessible through the Merchant UI Templates tab. Use this procedure to create template object names and programmatic access names, select default store-level template source files for them, and assign other template source files to them according to specialty store and language settings.

To display text in multiple languages, use Oracle Application Object Library's Message Manager.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- At least one specialty store must have already been created.
- At least one language must have already been defined.

Steps

1. Launch the Merchant UI.
2. In the Templates tab, search for templates that are already cataloged and available for use in your store.

The Templates page lists the names of the templates that match your search criteria, with their programmatic access names, keywords, descriptions, display level, and the default source files to use for all specialty stores and languages.

3. Click **Create**. To modify a template listing, click the template name in the page instead.

The Template Details Information and Source Files page opens.

4. In the Name field, enter the name by which the template is referred to during the planning stage, i.e., the common name.
5. In the Programmatic Access Name field, enter the name by which the template is referred to in the JSP.
6. In the Default Source File For All Sites and Languages field, enter the JSP to be used as the default if a non-default language or specialty store mapping is not defined.
7. In the Displays field, specify from the pull-down menu whether the template will be used to display a section (**section**), or a product or category (**category**). If the template will be used on Web pages that do not display the product catalog, choose **others** from the pull-down menu.
8. Optional: In the Keywords field, enter keywords for the template. Entering keywords enables a keyword-based search for this template when assigning a template to a display style.

9. Optional: In the Description field, enter a description for the template. Entering a description enables a description-based search for this template when assigning a template to a display style.
10. Click **Update**. An updated Template Details Information and Source Files page opens with a Source File for Other Sites and Languages section.

Figure 6–4 The Template Details Information and Source Files Page

The screenshot shows the Oracle Applications interface for the 'Template Details' page. The navigation bar includes 'Setup', 'Category', 'Hierarchy', 'Relationship', 'Product', 'Templates', 'Multimedia', 'Cache', and 'Reports'. The 'Templates' tab is selected. The page title is 'Template Details'. There are three tabs: 'Information and Source Files', 'View All Mappings', and 'Categories'. The 'Information and Source Files' tab is active, displaying a form with the following fields:

- *Name: Sample Template
- Keywords: sample
- *Programmatic Access Name: sample_temp
- Displays category: (empty)
- Default Source File For All Sites and Languages: sntemp.jsp
- Description: a sample template

Below the form is a section titled 'Source File for Other Sites and Languages'. It contains a table with one entry:

Remove	Source File
<input type="checkbox"/>	sntemp.jsp

At the bottom of the page are 'Update' and 'Restore' buttons. The page number '1-1 of 1' is visible in the bottom right corner.

11. Optional: Click **Add Source File** to choose files for the same template in different languages and specialty stores. See the Guidelines below for details.

The Source File Details page opens.

- a. Enter the name of a physical JSP source file that you want to use for the template name you are creating. Click **Update**.

An updated Source File details page opens with a Specialty Store and Language Mappings section.

- b. Add each store specialty store and language combination where you want the physical file to be used for this template, using the Specialty Store drop-down list and the **Go** buttons next to the Languages fields. Click **Update**.

The relationship between the template name, source file, specialty stores, and languages is saved.

- c. To add another physical file, click on the template name link.

The Template Details Information and Source Files page with the Source File for Other Sites and Languages section opens.

- d. Click **Add Source File** and repeat this step to add another physical file to this template.

12. Optional: In the Template Details Information and Source Files page, choose **View All Mappings**.

The View All Mappings page displays each physical file name and its relationship to specialty stores and languages. This step is highly recommended.

13. Optional: In the Templates tab, choose **Categories** if the template you created is meant to display product categories.

The Templates - Assigned Categories page lists the categories to which the template has been assigned. Click a category name to view all templates that have been assigned to the category.

14. Optional: If the template you created is meant to display product categories, you can assign it to categories now in the Category tab. In the Category tab, follow this procedure to add a template:

- a. Click the name of the category to which the template is applicable.

The Templates Assigned page lists all template names and default source template files for the chosen category.

- b. In the Templates Assigned page, click **Go**.

A list of available template names appears.

- c. Select the template(s) you wish to assign to the category.

- d. Click **Add**. The pop-up window closes when you select **Done**.

You can edit template information by clicking the template name in the Templates tab.

6.4 Defining Display Styles

Display styles specify how to present products on a Web page. For example, one display style specifies how to display Product A on a special sale page containing multiple products, and a different display style specifies how to display Product A on a page detailing product information. A display style calls an Oracle iStore 11i template, which then calls the appropriate template source file for the specialty store and language.

When you catalog display styles in the Setup tab, you choose store-level default template names for them. The display styles appear in the Product and Category tabs with fields where you can choose a template name to correspond with each display style for a product or a category. The display style fields also appear in the Hierarchy tab, where you can choose a template name to correspond with each display style for a section.

When a store Web page displays a product using a particular display style, Oracle iStore 11i selects the appropriate template as follows:

- If there is a product-specific template for the given display style, then the product-specific template is used.
- If no mapping is specified at the product level, and there is a category-specific template, then the category-specific template is used.
- If no template name is selected for a product or a category, then the display style's default store-level template is used on the Web page.

Clicking **Display Styles** in the Setup tab lists seeded display styles and their programmatic access names, descriptions, default templates, and default source files.

Seeded Values

- STORE_FEATURED_PRODUCT
- STORE_PRODUCT_DESCR
- STORE_PRODUCT_DETAIL
- STORE_PRODUCT_DETAILS
- STORE_PRODUCT_SMALL_DESCR

Use the following procedure to create more display styles.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

You can select a default template only after you have cataloged templates. If the information is unavailable, you may continue the setup and select a default template later. However, if a template association is requested for any product or section with that display style and is not specified, Oracle iStore 11i will use the default store-level template.

To avoid the error, you can also use the seeded values for display styles, listed under **Display Styles** in the Setup tab.

Steps

1. Launch the Merchant UI.
2. In the Setup tab, choose **Display Styles**.
The Display Styles page displays a list of existing display styles.
3. Click **Create**.
The Display Style Details page opens.
4. Assign names and descriptions to the display style.
5. Optional: Click **Go** to select a default template for this display style.
6. Click **Update**.
The display style information is saved.

You can edit display style information by clicking the display style name in the Display Styles page in the Setup tab.

6.5 Creating Product Relationships

Relationships are used for merchandising, for example, to offer a substitute product for a product that is out of stock. Relationship types are used to create specific relationship rules that associate products, categories, and sections to other products, categories, and sections. One relationship type can contain either rules created using the rule builder or one SQL rule. It cannot contain both.

Note: Using SQL rules to define relationships by querying the database on particular fields is a method primarily used by Oracle Consulting or other highly technical personnel. Most store managers will use the mapping rules.

The mapping rules define relationships in a From-To form. The types of From and To objects can be categories (defined in Oracle Inventory), sections or hierarchies (defined in Oracle iStore 11i), or items (defined in Oracle Inventory). The application evaluates each mapping rule and inserts rows in a table maintaining the preevaluated relationships. For example, if you have a category with two products assigned in your From list and a section with four products assigned in your To list, then Oracle iStore 11i creates a total of eight product relationships.

Your business needs determine the creation of relationships. Oracle iStore 11i ships with several seeded relationship types, listed in [Section 6.5.1, "Using Seeded Relationship Types"](#) and also in the Merchant UI Relationship tab.

If you use any relationship type other than the seeded relationship type RELATED, you must customize the Oracle iStore 11i JSPs to retrieve the related items with the Java API `oracle.apps.ibe.catalog.Item.getRelatedItems()`. This method can retrieve related items given an item ID and a relationship type. The method is also overloaded. See *Oracle iStore API Reference Guide* for documentation of this method.

If the relationship type is also seeded in Oracle Inventory, then `oracle.apps.ibe.catalog.Item.getRelatedItems()` retrieves related items defined in Oracle Inventory as well as in Oracle iStore 11i.

See [Section 6.5.1, "Using Seeded Relationship Types"](#) and [Section 6.5.2, "Creating Relationship Types"](#) for procedures that build relationships.

6.5.1 Using Seeded Relationship Types

Oracle iStore 11i has several seeded relationship types that you can use to build relationships.

Seeded Values

- RELATED: Entity B is related to Entity A.
- SUBSTITUTE: Entity B can be substituted for Entity A.
- CROSS_SELL: Entity B can be offered and sold along with Entity A
- UP_SELL: A newer version Entity B can be sold instead of Entity A.
- SERVICE: Entity B is a service item that can be added to the shopping cart for a serviceable Entity A.
- PREREQUISITE: Customer must have Entity B before purchasing Entity A.
- COLLATERAL: Entity B is collateral (e.g. marketing brochures) that exists for Entity A.
- SUPERSEDED: Entity B supersedes Entity A, which is no longer available.
- COMPLIMENTARY: Entity B is available free of charge with Entity A.
- IMPACT: Entity A is usable together with related Entity B, but only under certain conditions.
- CONFLICT: Entity A is not usable together with a related Entity B.
- MANDATORY_CHARGE: Mandatory charge
- OPTIONAL_CHARGE: Optional charge
- PROMOTIONAL_UPGRADE: Entity A ordered by the customer is upgraded to Entity B of equal or higher value, with no change to the price.

Use the following procedure to create relationships using the seeded relationship types.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

Products must exist in Oracle Inventory.

Steps

1. Launch the Merchant UI.
2. In the Relationship tab, review the seeded relationship types.
3. Click the name of a relationship type to create a relationship between items. For example, click SUBSTITUTE to make item B a substitute for item A if item A is out of stock.
4. Click **Add Rules**.
5. In the middle frame, search for the base product, and click the left arrow to add it to the From List.
6. Search for the related product, and click the right arrow to add it to the To List.
7. Click **Done** to save the relationship.

6.5.2 Creating Relationship Types

Use this procedure to define relationship types and add rules to them.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

Products must exist in Oracle Inventory.

Steps

1. Launch the Merchant UI.
2. In the Relationship tab, choose **Create**.
The Create Relationship page opens.
3. In the Name field, enter the relationship type name.

Optional: In the Description field, enter a description. This enables a description-based search for the relationship type.

Optional: In the Start Date and End Date fields, enter a start date and an end date for the relationship type to be valid.

Click **Create**.

The relationship type has been created. The Relationship Detail page opens, where you can begin adding rules to the relationship type.

4. Choose to specify the pairs of related items by SQL query or by mapping rules and highlight the appropriate radio button. Click **Create Rule**.

The Add Rules page opens if you choose **Create Mapping Rules**.

The Relationship Detail page opens if you choose **Create a SQL Rule**.

5. If you choose **Create Mapping Rules**, proceed as follows:

- a. Conduct a search to view products, categories, or sections in the center table.

The search results appear in the table.

- b. Select the items in your search results that you want to be in the From side of your rule, and click the left arrow.

The selected items appear in the From List.

- c. Conduct a search to view products, categories, or sections in the center table.

The search results appear in the table.

- d. Select the items in your search results that you want to be in the To side of your rule, and click the right arrow.

The selected items appear in the To List.

- e. Repeat as needed to complete your From and To lists for this rule.

- f. Click **Done** to submit the relationship rule creation, or click **Preview Rules** to validate or exclude the relationship rules to be added.

If you click **Done**, the Relationship Detail page opens. The application generates a rule from every object in the From list to every object in the To list.

If you click **Preview Rules**, the Preview Rules Page opens. At this point the rules have not been added to the system. You may exclude any rules not needed. When finished, click **Done** to see the Relationship Detail page.

- g. From the Relationship Detail page, you may select a link for each rule to view all product to product relationships generated by that rule, or click **View All Results** to view all product to product relationships generated by all rules in this relationship type.

From either option, the Relationship Result page displays the product-level relationship results.

If you do not want to include one or more of the generated rules, select **Exclude** and click **Update**.

The excluded product-level relationships can be re-included.

6. If you choose **Create a SQL Rule**, the following incomplete SQL displays on the Relationship Detail page:

```
SELECT msi.inventory_item_id
FROM mtl_system_items msi
WHERE
```

The SQL should return only the column `inventory_item_id` in the `MTL_SYSTEM_ITEMS` table. You can add as many tables as you want in the From list and add any conditions in the Where clause.

6.6 Customizing Product Presentation at the Category Level

Every product is assigned or mapped to a category in Oracle Inventory. With customized multimedia, templates, and display styles, you can set up customized category-level defaults for products belonging to a category.

Use this procedure to modify defaults for categories. You can only specify defaults for categories belonging to the primary display category set (the value of the IBE: Category Set profile option). If the product does not belong to any category in the primary display category set, then the store-level defaults are used.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

- Products must be assigned to categories in Oracle Inventory in order to be returned upon a search of those categories.
- Multimedia, templates, and styles must exist before you can assign them to a category.
- The IBE: Category Set profile option must be set. See [Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI"](#) for details.

Steps

1. Launch the Merchant UI.
2. In the Category tab, search for categories by Category Name or Description.
The Categories page displays a list of item categories from Oracle Inventory which belong to the category set specified in the IBE: Category Set profile option with related templates, display styles, and multimedia components.
3. Click the category name that you want to update.
The Templates Assigned page lists all template names and default source template files available for Web pages that display items in the chosen category.
4. In the Templates Assigned page, perform the following steps to make a template available for association with a display style in this category:
 - a. Click **Add**.
A list of available template names appears.
 - b. Select a template.
 - c. Click **Add**. The pop-up box closes when you select **Done**.
5. In the Category tab, choose **Display Styles**.
The Display Styles page lists all display styles you defined in the Setup tab.
6. For each display style you can choose a template from the templates assigned to the category. Select **Update**.
In store Web pages related to this category that use a given display style, this template overrides the display style default template.
7. In the Category tab, choose **Multimedia Components**.
The Multimedia Components page lists all multimedia components that you defined in the Setup tab.

8. Optional: Assign multimedia names to multimedia components. Click **Update**.
In store Web pages related to this category, when a template accesses a multimedia component, the multimedia name selected here overrides the multimedia component's default multimedia setting. The multimedia name retrieves the media source file mapped to the specialty store and language used by the customer.

6.7 Customizing Product Presentation at the Item Level

Item-level customizations override category-level, section-level, and store-level settings. You can customize product presentation at the item level in the following ways:

- Modify the product catalog. See [Section 5.7.2, "Modifying the Product Catalog"](#) for more information.
- Create and associate specific images with certain products.
Defining proprietary multimedia and multimedia components enables association of specific images with certain products.
- Add item descriptive flexfields.

6.7.1 Creating Images for Products

To associate specific images with certain products, use the following procedure.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Create images for products. Either create a new image for the product (usually done by a graphic artist) or use an existing image.

2. Set up the multimedia in the Merchant UI as described in [Section 6.1.3, "Cataloging Multimedia"](#). Include the product image file in the source file listing for the multimedia.
3. Set up the multimedia component in the Merchant UI to associate the image with the product.
 - a. In the Product tab, search for the product that you want to associate with the image.
 - b. Click the product name.
 - c. Click **Multimedia Components**.
 - d. Highlight the radio button for Item Small Image and/or Item Large Image.
 - e. Click **Go**. A popup window with all the multimedia names will open.
 - f. Select the multimedia set up for the image.
4. Purge the product from the cache by following the instructions in [Section 6.10, "Managing the Cache"](#).
5. Verify that the image is associated with the product in the store's Customer UI.

6.7.2 Adding Item Descriptive Flexfields

Oracle iStore 11*i* allows addition of descriptive flexfields to item detail pages. With this option, the item detail page will display the prompt and value of descriptive flexfield global segments if a value is defined for the item. Only global segments of the descriptive flexfield are supported.

To set up descriptive flexfields on an item detail page, follow this procedure.

Login

Log in to Oracle Forms.

Responsibility

Application Developer

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.

2. Choose **Flexfield > Description > Segments** to open the Descriptive Flexfields window.
3. Choose **View > Find**, and query for the flexfield with `Application = Oracle Inventory` and `Title = Items`.
4. Set up flexfield segments for Global Data Elements. See *Oracle Applications Flexfields Guide* for additional details.
5. Switch to the Inventory responsibility.
6. To set up flexfield segments and values for items and their detail pages:
 - a. Navigate to the Inventory Item window and find the item for which flexfield values will be entered. Use the inventory organization that is set in the profile option `IBE: Item Validation Organization`.
 - b. Click on the rectangle enclosed within [] next to the Description field in the Inventory Item window.
 - c. A window opens with the flexfield segments set up in the previous steps.
 - d. Enter values for the flexfield segments you want to display on the item detail page.
7. Test that the descriptive flexfield segments appear in the item detail pages as desired, using the following procedure:
 - a. Reboot the Apache server to clear the cache after entering the data.
 - b. In the Customer UI, navigate to the item detail page for an item with flexfield values entered.
 - c. The flexfield segment prompts and values should appear on the item detail page.

6.8 Customizing the Shopping Cart

You can customize shopping cart pages in the following ways:

- [Customizing Shopping Cart Page Bin Content](#)
- [Enabling Unit of Measure \(UOM\) Conversions](#)
- [Allowing Decimal Quantities for Items](#)
- [Specifying Flexfields At the Checkout Page](#)

6.8.1 Customizing Shopping Cart Page Bin Content

All seeded shopping cart templates share the same layout. The shopping cart page layout has a top bin and a bottom bin. Each bin is listed as a logical template in the Oracle iStore 11i template manager. You can customize the content of a bin by mapping a JSP to the logical template. For example, you can include Oracle Marketing Online's eMerchandising banners at the top and bottom of the shopping cart pages.

The programmatic access name of the top shopping cart bin is `STORE_CART_ITEMS_BIN_TOP`. The programmatic access name of the bottom shopping cart bin is `STORE_CART_ITEMS_BIN_BOTTOM`.

Use the following procedure to customize the content of the shopping cart bins.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

None

Steps

1. Launch the Merchant UI.
2. In the Templates tab, click the name of the bin template that you want to modify.
The Template Details page opens.
3. Add a new source file for the bin content.
4. Add the necessary mappings for the desired minisite-language combinations. To use this source file for all minisites and all languages, add a mapping for all minisites, all languages. The changes will not be overwritten when patches are applied because there are no seeded default values for these bins.

6.8.2 Enabling Unit of Measure (UOM) Conversions

Oracle Pricing handles UOM conversions. The Pricing engine will only do UOM conversions if the Primary UOM Code checkbox is checked for the item in the Price List Setup window.

UOM Conversion Example

The primary UOM of Item X is Each and a conversion of 12 Each = 1 Dozen has been set up in Inventory. When pricing Item X, Oracle iStore 11i calls the Pricing engine passing in (Item X, Each) and (Item X, Dozen). The price list has a price for (Item X, Each).

- If the price list also contains (Item X, Dozen), the price for (Item X, Dozen) is returned.
- If the price list does not contain (Item X, Dozen) and the Primary UOM Code checkbox is checked for (Item X, Each), the price returned is 12 times the price of (Item X, Each).
- If the price list does not contain (Item X, Dozen) and the Primary UOM Code checkbox is not checked for (Item X, Dozen), an error is returned.

6.8.3 Allowing Decimal Quantities for Items

When adding an item or updating its quantity in the Oracle iStore 11i shopping cart, the customer can enter a decimal quantity if it is supported by the item. Oracle iStore 11i calls the same API used by Oracle Order Management for validating quantity. If an item is marked OM Indivisible, decimal quantities are not allowed for its primary UOM.

To prevent the customer from selecting a decimal quantity of an item, follow this procedure.

Login

Log in to Oracle Forms.

Responsibility

Inventory

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Inventory responsibility for the Master Inventory Organization.
2. Choose **Master Items**.
3. Choose the appropriate inventory organization (the same as the Oracle iStore 11i Item Validation Organization).
4. Query for the item.
5. In the Physical Attributes tab, check **OM Indivisible**.
6. Repeat for all inventory organizations that contain the item.

To allow the customer to select a decimal quantity of an item, follow the previous steps, but uncheck **OM Indivisible**.

6.8.4 Specifying Flexfields At the Checkout Page

Oracle iStore 11i allows addition of flexfields to the checkout page and saves the information they contain to the quote. It passes the content of a flexfield on to Oracle Order Management as a comment in a non-validated field. For example, you can set up a flexfield for the sales representative that will go to Oracle Order Management as a comment that Order Administration will use to assign the correct sales representative ID.

Specify flexfields at the checkout page using the following procedure.

Login

Log in to Oracle Forms.

Responsibility

Application Developer

Prerequisites

None

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose **Flexfield > Description > Segments** to open the Descriptive Flexfields window.

3. Choose **View > Find**, and query for the flexfield with Application = Oracle Order Capture and Title = Header: Additional Information.
Set up flexfield segments. For example, map "Sales Rep Email" to "ATTRIBUTE1."
4. Query for the flexfield with Application = Oracle Order Management and Title = Additional Header Information.
Set up flexfield segments. For example, map "Sales Rep Email" to "ATTRIBUTE1."
Confirm the following:
 - The same database columns are in use for both the Oracle Order Capture and Oracle Order Management flexfield segments (ATTRIBUTE1 in the previous example).
 - The usage in Oracle Order Capture does not conflict with other flexfield definitions in Oracle Order Management.
 - Only global segments of a flexfield are supported.
5. Test your checkout page using the following steps:
 - a. Checkout a shopping cart and proceed to the "Payment And Billing Information" page.
 - b. You should see "Sales Rep Email" field under "Additional Information." You may enter information in this field, then continue.
 - c. After your order is created, go to Forms and check if the Sales Rep Email flexfield information is present in both Oracle Order Capture and Oracle Order Management Forms.
6. Customize the prompts for the flexfields.
The default prompt title is, "Additional Information." To change it, log in to Oracle Forms and modify the message IBE_PRMT_ORD_FLEX_TITLE in the FND_NEW_MESSAGES table.
The default additional instruction is, "Please fill in the following fields." To change it, log in to Oracle Forms and modify the message IBE_PRMT_ORD_FLEX_DESCR in the FND_NEW_MESSAGES table.

6.9 Creating B2B User Roles

If the seeded B2B user roles `IBE_BUSINESS_USER_ROLE` and `IBE_PRIMARY_USER_ROLE` do not meet all of your business needs, you can create new roles with any set of seeded Oracle iStore 11i permissions that you wish to specify. You can then assign the roles to B2B users who register in your Web stores. See [Section 5.11.3, "Roles and Permissions for Oracle iStore 11i Users"](#) for descriptions of seeded B2B user roles and existing Oracle iStore 11i permissions.

Use Oracle CRM Technology Foundation to create new roles. See *Oracle CRM Technology Foundation Concepts and Procedures* for instructions on creating new roles and mapping permissions to roles.

6.10 Managing the Cache

Oracle iStore 11i caches your Web storefront product items and sections to improve the performance of your Web site, if the profile option `IBE: Cache On` is set to **Yes**. However, if you make changes to a cached product item or section, the changes are not visible in the Customer UI unless the product item or section is purged from the cache.

Restarting the Apache server purges the entire cache, but you may not always want to do this, since it removes product items or sections you do not want to remove from the cache, and since the Web stores are unavailable while the server is restarting.

Oracle iStore 11i offers a cache management feature in the Merchant UI that enables you to purge only the product items or sections that you want to remove from the cache, while keeping the server—and thus the Web stores—up and running. You can purge the cache of the following sets of product items and sections:

- Specific product item(s)
- Specific section(s)
- All product items
- All sections
- The entire cache

Oracle iStore 11i uses multicast messages when it purges the cache to ensure that the cache on each Java Virtual Machine (JVM) is purged. The Oracle iStore 11i initialization code starts a thread within each JVM that listens for messages on a specific address and port. When you choose to purge the cache from the Merchant UI, Oracle iStore 11i sends a multicast message to that address and port. When a

thread receives the message, it interprets the message and purges the appropriate cache. Since there is a thread on each JVM listening for messages, the cache will be purged in each JVM. The port number is set in the profile option IBE: Port Number to use for multicast messages. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for more information about this profile option.

6.10.1 Purging the Entire Cache

Use this procedure to purge either the entire section cache or the entire product cache, or both.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

The profile option IBE: Cache On is set to **Yes**.

Steps

1. Launch the Merchant UI.
2. In the Cache tab, click on the Purge Entire Cache link.
The Purge Entire Cache page opens.
3. Highlight the radio button next to the cache purging option you want to exercise:
 - Purge the entire Section Cache and entire Item Cache
 - Purge the entire Section Cache only
 - Purge the entire Item Cache only
4. Click **Update**.
The cache is purged.

6.10.2 Purging the Section Cache

Use this procedure to purge individual sections from your section cache.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

The profile option IBE: Cache On is set to **Yes**.

Steps

1. Launch the Merchant UI.
2. In the Cache tab, click on the Purge Section Cache link.
The Purge Section Cache page opens.
3. Search for the section(s) you want to purge:
 - a. From the View pull-down menu, specify whether you will search by **Name**, **Section Code**, **Section Type**, or **Status**.
 - b. In the adjacent text field, enter your search criterion. Use % as a wildcard character if necessary.
 - c. Click **Go**.

The search results appear in the Purge Section Cache page.

4. Select the checkbox in the Select column next to the section(s) you want to purge.
5. Click **Update**.
The cache is purged.
6. Optional: You can view the contents of the section cache at any time by navigating to the following URL:

`http://<host>:<apache port>/OA_HTML/ibemckvs.jsp`

6.10.3 Purging the Product Cache

Use this procedure to purge individual product items from your product cache.

Login

Log in to Oracle CRM Applications as a store manager user.

Responsibility

IBE_ADMINISTRATOR

Prerequisites

The profile option IBE: Cache On is set to **Yes**.

Steps

1. Launch the Merchant UI.
2. In the Cache tab, click on the Purge Product Cache link.
The Purge Product Cache page opens.
3. Search for the section(s) you want to purge:
 - a. From the View pull-down menu, specify whether you will search by **Name, Part Number, Category, or Status**.
 - b. In the adjacent text field, enter your search criterion. Use % as a wildcard character if necessary.
 - c. Click **Go**.

The search results appear in the Purge Product Cache page.

4. Select the checkbox in the Select column next to the product(s) you want to purge.
5. Click **Update**.
The cache is purged.
6. Optional: You can view the contents of the product cache at any time by navigating to the following URL:

`http://<host>:<apache port>/OA_HTML/ibemckvp.jsp`

Verifying the Implementation

This chapter describes the tasks required to verify your implementation of Oracle iStore 11*i*. Topics include:

- [Oracle iStore 11i Implementation Verification Tasks](#)

7.1 Oracle iStore 11i Implementation Verification Tasks

You must also test your storefronts before launching your stores, as described in [Section 7.1.1, "Testing the Store"](#).

Once you have launched your stores, you can continue to test and verify additional changes to the catalog before making the changes public. See [Section 7.1.2, "Previewing Products and Sections"](#) for more information on testing the appearance of products and sections in your Web stores.

7.1.1 Testing the Store

Test the storefront with the following URL:

```
http://<host>:<apache port>/OA_HTML/ibeCZzdMinisites.jsp
```

This page allows you to navigate to any of your specialty stores, and to sign in if necessary.

7.1.2 Previewing Products and Sections

You can use the Preview feature of Oracle iStore 11i to preview the appearance of products and sections in the Customer UI before publishing them for your customers. Assign multimedia components, display styles, and categories to your products and sections. Set the statuses of the products and sections to Unpublished. Unpublished products and sections appear in the Customer UI only if the user has the IBE_ADMINISTRATOR responsibility. Next, use the following procedure to preview unpublished products and sections in the Customer UI.

Steps

1. Launch the Merchant UI.
2. In the same browser window, navigate to the URL for the Customer UI.

Note: Do not log out of the Merchant UI before navigating to the Customer UI.

3. Choose the specialty store with the unpublished products and sections that you want to preview, and navigate to the products and sections.
4. After viewing the products and sections, return to the Merchant UI. Here, you can make additional changes or publish the products and sections.

See [Section 7.1.1, "Testing the Store"](#) for more information about the Customer UI and testing your stores.

Diagnostics and Troubleshooting

This section contains instructions on error corrections and workarounds for problems that you may encounter in configuration or administration of Oracle iStore 11*i*. Topics include:

- [Setting Up User-Level Logging](#)
- [Receiving Diagnostic Messages](#)
- [Java Applet Warning Workaround](#)
- [Error ORA-29868 While Executing amviccn.sql](#)
- [Merchant UI Menu Errors](#)
- [Hierarchy Errors](#)
- [Display Manager Errors](#)
- [Catalog Errors](#)
- [Pricing Errors](#)
- [Shopping List Errors](#)
- [Search Errors](#)
- [Notifications Errors](#)
- [Storefront Reports Errors](#)
- [Postsales Errors](#)
- [Potential Issues Installing Oracle8i interMedia Text Version 8.1.7](#)
- [Reporting Issues](#)

8.1 Setting Up User-Level Logging

Oracle iStore 11*i* allows user level logging of debug messages. This feature creates separate user log files for the JSP/Java and PL/SQL layers. You should only use this feature to diagnose problems in the application.

You can activate user-level logging by setting the profile option IBE: Enable Debug to **Yes** at the user level for a specific user.

Steps to Set Up JSP/Java Level Logging

1. Note the log directory in which the Oracle CRM Technology Foundation (JTT) Java log resides, as specified at JServ startup.
2. Set the profile option IBE: Enable Debug to **Yes** at user level for a user.

When a user logs in to the Oracle iStore 11*i* Customer UI, the application creates a user-specific log file in the same directory as the system log file. As long as the user session is valid, all log messages are written to the same log file.

The file name has the syntax IBE_<Username>_<Random Number>.log.

Steps to Set Up PL/SQL Level Logging

1. Set the profile option IBE: Enable Debug to **Yes** at user level for a user.
2. Set the profile option OM: Debug Log Directory at site level to a directory that is writable by the database server.
3. Set the init.ora UTL_FILE_DIR parameter to point to the same directory.

When a user logs in to the Oracle iStore 11*i* Customer UI, the application writes all log messages for the user to a user-specific log file in the directory specified by OM: Debug Log Directory.

The file name has the syntax IBE_<Username>.log.

8.2 Receiving Diagnostic Messages

When there is an Oracle iStore 11*i* application error in the Customer UI, such as an exception, Oracle iStore 11*i* delivers a diagnostic e-mail message to any e-mail address that you specify. The diagnostic message contains the exception message and the application context. You can specify the e-mail address in the profile option IBE: Email Address to send Diagnostic Messages.

8.3 Java Applet Warning Workaround

Use the following procedure to remove the yellow bar displaying a Java Applet warning.

1. Uninstall JInitiator from your client machine as follows:
 - a. In Windows 95/98/NT, go to **Start > Settings > Control Panel > Add/Remove Programs**.
 - b. Find Oracle JInitiator 1.1.7.27 Export, and click **Add/Remove**.
 - c. Make sure JInitiator is removed successfully.
2. Delete the identitydb.obj file from your client machine (it is usually in the parent directory of your JInitiator installation, i.e., C:\Program Files\Oracle\).

3. From your client machine, FTP to the server.

```
cd <COMMON_TOP>/html
```

where <COMMON_TOP> is the actual value (e.g., /u04/viscomm). You cannot use environment variables in FTP. Make sure you are using binary transfer mode: bin.

4. Download oajinit.exe to your client machine:

```
get oajinit.exe
```

5. Change to <APPL_TOP>/admin, where <APPL_TOP> is the actual value (e.g., /u02/visappl).

6. Download the certificate file appltop.cer:

```
get appltop.cer
```

7. Close the FTP session.
8. On your client machine, launch a command prompt session, and execute oajinit.exe from the command line. Wait until JInitiator is successfully installed.
9. Change to the directory in which JInitiator is installed (typically C:\Program Files\Oracle\Oracle JInitiator 1.1.7.27 Export).
10. Change to the bin subdirectory.
11. Copy the appltop.cer file into the bin directory.
12. Execute the following command exactly as shown:

```
./javakey.exe ic appltop appltop.cer
```

13. If your browser was open, close and restart it.
14. Log in to Oracle Forms. The yellow bar should not appear.

8.4 Error ORA-29868 While Executing amviccn.sql

When running the database driver and executing amviccn.sql, you may receive the following error message:

```
ORA-29868: cannot issue DDL on a domain index marked as LOADING.
```

This error causes AutoPatch to halt.

To correct this error, use the following procedure.

Note: For instructions on how to use the AutoPatch utility, see *Maintaining Oracle Applications*.

Steps

1. Open another window or telnet session.
2. Set up the environment as usual.
3. Change to the \$AMV_TOP/patch/1306413/amv/patch/115/sql directory.
4. Add the FORCE clause to the DROP INDEX command by editing the file amviccn.sql to change the line

```
dbms_sql.parse(curs, 'DROP INDEX '||dropIndex.index_name, dbms_sql.native);
```

to

```
dbms_sql.parse(curs, 'DROP INDEX '||dropIndex.index_name||' FORCE',  
dbms_sql.native);
```

5. Save the file amviccn.sql.
6. Use the adctrl utility to restart the failed worker by performing the following procedure:
 - a. Execute adctrl.
 - b. Accept defaults for all prompts until you get to the Main Menu.

- c. Choose **1. Show Worker Status** to identify the failed worker.
 - d. Press **Return** to continue.
 - e. Choose **2. Tell Worker To Restart A Failed Job** and enter the ID number of the failed worker.
 - f. Choose **1. Show Worker Status** again to monitor the status of the job.
7. If all else fails, stop and restart adpatch.

8.5 Merchant UI Menu Errors

Use the following fixes for the errors listed below.

Patch Has Duplicated Merchant UI Tabs

If a patch has duplicated all of the Merchant UI tabs, use the following procedure to remove the duplicate tabs.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose **Application > Menu**.
The Menus form opens.
3. Place the cursor in the Menu field.
4. Choose **View > Find**, or click the flashlight icon on the toolbar to search for iStore menus.
The Find Menu window opens.
5. In the Find field, enter `iStore`.
The iStore menu values appear in the Find Menu window.
6. Select **iStore** and click **OK**.
The Menus form for iStore (IBE_ALL_ROOT) opens.
7. In the Menus form, remove the duplicate entries from the iStore menu.
8. Save the record.

Notifications Subtab Does Not Appear

See [Section 8.12, "Notifications Errors"](#) for the fix.

Reports Tab Does Not Appear

See [Section 8.13, "Storefront Reports Errors"](#) for the fix.

8.6 Hierarchy Errors

Use the following fixes for the errors listed below.

The Hierarchy Tree Does Not Appear

You must define the OA_JAVA alias in the Apache configuration file as follows:

1. Locate the file `httpds.conf` in the `$APACHE_TOP/ Apache/ conf` directory.
2. Add the following line:

```
Alias /OA_JAVA/"<actual Java directory>"
```

For example, enter:

```
Alias /OA_JAVA/" /u01/oracle/viscomm/java/ "
```

3. Clear your cache and restart the Apache server.

The Add Section Button Does Not Appear

The **Add Section** button appears in the Hierarchy tab only when the Home root section has no subsections. To create a new subsection of Home, highlight Home and click **Create**.

Cannot Find Item to Add to Section

If you want to add an existing Oracle Inventory item to a section and cannot find the item, then check the following:

- In Oracle Inventory, the item's Web Status is Published.
- In Oracle Inventory, the item is defined as Orderable on the Web.
- In Oracle Pricing, the item is defined in a price list.

Creating New Section Returns IBE_DSP_J_CRT_HIER_SCT_FAIL

This error message appears when you try to create another root section. Only one root section can exist. Highlight the root section and click **Create** to create a new section as a subsection of the root section.

8.7 Display Manager Errors

If a stack trace or error message indicates that a Display Manager API caused an error, check the top line of the exception Java stack trace for the last class and method that was called and caused the error.

Display Manager uses two sets of log files:

- FWSYS, system log files that are used by JTT and are not used by Applications.
- ibe.log.run, the Application log files that contain the sequence of actions recorded by Oracle iStore 11i.

8.7.1 Display Manager Error Messages

Use the following fixes and workarounds for the Display Manager error messages listed below.

TemplateNotFoundException or MediaNotFoundException

This error occurs when the method `DisplayManager.getURL()`, `DisplayManager.getTemplate(accessName)`, or `DisplayManager.getMedia(accessName)` is used.

- Verify that the template or media was created in the Merchant UI by searching for it by access name in the Merchant UI.
- Reboot the server.
- Check the log file for diagnostic messages.

NullPointerException (Template or Multimedia Object is Null)

This error occurs when the method `Item.getTemplateFileName()`, `Section.getTemplateFileName()`, or `Display Manager.getSectionMedia(...)` is used.

This error indicates that a product or section mapping to a template or multimedia was not defined and that a store level default was also not defined.

- Verify that the mapping for the product or section is specified in the Merchant UI.
- If the category default is in use, check whether a mapping has been defined at the category level for the requested display style.
- Verify that the specified display styles or multimedia components are available.

- Verify that the product or section cache was cleared after the mapping was created.
- Check the log file for diagnostic messages.

New Template (or Multimedia) Has Been Associated with a Product/Category/Section, But Won't Show Up at Runtime.

- Verify that the association was created in the Merchant UI.
- Verify that the specified display styles or multimedia components are available.
- Verify that the product or section cache was cleared after the association was created.
- Check the log file for diagnostic messages.

8.8 Catalog Errors

To troubleshoot Catalog errors, use the checkpoints or the following fixes for specific error messages.

8.8.1 Checkpoints

- View the JSP source in the Web browser and look for a stack trace.
- Check the log file for a stack trace.
- If you know the JSP or Java method in which the error occurred, search the log file for debug statements from the JSP or method.
- If a Web store page does not appear, verify whether the problem is with the database, Apache server, connection, or JTT/AOL as follows:

1. Go to the following URL:

`http://<host>:<apache port>/html/jtfmain.htm`

This page has links to test the basic functionalities that Oracle iStore 11i depends on.

If the page itself does not appear, the problem is with the database connection.

2. Follow the instructions on the page and use the links to check for environment problems.

- If an eMerchandising posting from Oracle Marketing Online does not show up in the Oracle iStore 11*i* catalog, check the following points:
 - Oracle Marketing Online is installed.
 - The profile option IBE: Use Web Placements is set to **Yes**.
 - The centralized posting JSP (ibecpstg.jsp or ibeCCtpPostingI.jsp) is modified to set the correct posting ID value.
 - After modifying the centralized posting JSP, the following pages were removed from the `_pages` directory and recompiled: `ibec*.java`, `ibescdch.java`, `ibeCCt*.java`, `ibeCScdViewA.java`, `ibec*.class`, `ibescdch.class`, `ibeCCt*.class`, and `ibeCScdViewA.class`.
 - If Oracle iStore 11*i* has successfully displayed other types of eMerchandising postings, the problem may be due to an Oracle Marketing Online setup issue or other Oracle Marketing Online problem.

8.8.2 Specific Error Messages

Use the following fixes and workarounds for the error messages listed below.

No Items in the Catalog

- Check the following profile options:
 - ASO: Product Organization
 - IBE: Item Validation Organization
 - MO: Operating Unit
- Check the Oracle Inventory Item setup for items that should appear in the catalog. They must have the following setup:
 - Web Status = Published
 - Orderable on the Web = Y
 - `start_date_active` is NULL or `<=SYSDATE`
 - `end_date_active` is NULL or `>=SYSDATE`
 - The item's primary unit of measure is in `MTL_UNITS_OF_MEASURE_VL`.
 - The item is available in the user's organization. A user only sees items in his or her inventory organization. You can check the Oracle iStore 11*i* log

file for "Organization Id" to see the value of the user's Inventory Organization ID.

- If there are configurable items in the catalog, confirm that their components' item setups are also correct. Otherwise, their descriptions will not appear in Oracle iStore 11i.

Items Do Not Have Prices

- Check the following profile options:
 - IBE: Pricing Event—Before Shopping Cart
 - IBE: Request Type to get a Price
 - IBE: Use Price list associated with Specialty Store
- Confirm that items are in the minisite price list.
- Confirm that the minisite has the correct price lists for walk-in and registered B2B and B2C users.
- Confirm that the price list has item prices for the correct UOMs.
- Confirm that the price is set up correctly in Oracle Pricing.
- Check the log file for the pricing API, `Item.getListAndBestPrices()`, that is being called. Confirm the values that Oracle iStore 11i passes to the Pricing engine: price list ID, currency code, inventory item IDs, UOM codes, price request type, and pricing event. Oracle iStore 11i only passes party ID and account ID for user-specific pricing. Check the values that Oracle Pricing returns: status code and status text.
- Status Code from Pricing Engine
 - UPDATED
 - DUPLICATE_PRICE_LIST
 - INVALID_UOM
 - IPL: Invalid price list ID, that is, a non-existent price list.
- If the profile option IBE: Use Price list associated with Specialty Store is set to **No**, check the following setups:
 - Set the profile option ASO: OM Defaulting to **Yes** at the desired level: site, application, responsibility, or user.

- Log in to Oracle Forms with the Oracle Pricing Manager responsibility. Choose **Setup > Event Phases**. Query for all event phases. Set Search Flag to Yes for the pricing event "LINE" in all phases.
- Log in to Oracle Forms with the Oracle Pricing Manager responsibility. Choose **Price Lists > Price List Setup**. Search for the price list in question. Make sure the precedence at the product level is set correctly so that Oracle Pricing can resolve to a single price list.

For example, if there are only two price lists defined, Price List A and Price List B, and all users qualify for both price lists, and if both price lists contain Product X with precedence 220, then Oracle Pricing returns an error because it cannot choose a single price list. If the Product X precedence is 100 in Price List A and 220 in Price List B, Oracle Pricing can resolve to Price List A.

- To confirm that the defaulting row is set up correctly in Oracle Order Management, log in to Oracle Forms with the Order Management Super User responsibility. Choose **Setup > Rules > Defaulting**. Search using the criteria of Application = Oracle Order Management and Entity = Order Header. Select Order Type from the Attributes section and click **Defaulting Rules**. Add an entry in the Default Sourcing Rules with the following information:
 - Sequence = 1
 - Source Type = Constant Value
 - Order Type = Standard

“Add to Cart” Buttons Do Not Appear

“Add to Cart” buttons are not displayed for items that are not orderable on the Web and for items that do not have defined prices.

- Check that the item setup has `orderable_on_web_flag = 'Y'` in Oracle Inventory.
- Check the price setup.
- Confirm that the item’s BOM item type is not OPTION class.
- If the item’s BOM item type is MODEL, the item must have the Oracle Configurator UI set up.

8.9 Pricing Errors

To troubleshoot Pricing errors, use the following checkpoints and debugging procedures.

8.9.1 Checkpoints

Use the following checkpoints to troubleshoot pricing in Oracle iStore 11*i*.

- If you want to use the Oracle Pricing engine to determine which price list to use in Oracle iStore 11*i*, then set the profile option IBE: Use Price List associated with Specialty Store to **No** at the iStore application level.
- When you change an item's price, clear the item from the product cache by using the Merchant UI.
- When you create a new modifier, run the Build Sourcing Rules concurrent program with the Pricing Manager responsibility.

8.9.2 Generating a Pricing Debug Trace

You can generate a pricing debug trace to create detailed log files when Oracle iStore 11*i* calls the Oracle Pricing engine. Oracle iStore 11*i* creates two log files because it calls the Oracle Pricing engine twice, once in the catalog and once in the shopping cart. The call from the catalog goes directly to Oracle Pricing. The call from the shopping cart is performed through Oracle Order Capture, resulting in additional quote-related information in the log file.

Use the following procedure to generate the pricing debug trace.

Steps

1. Set the profile option QP: Debug to **Yes** at the user level for the username that you are testing.
2. Set the profile option OM: Debug Log Directory at the site level to the value of the init.ora UTL_FILE_DIR parameter. To find this value, perform the following SQL*Plus query:

```
select value
from v$parameter
where name='utl_file_dir';
```

3. Log in to the Oracle iStore 11*i* Customer UI as the user that you are testing.
4. Perform the pricing activity that you are trying to debug.

5. In the operating system, navigate to the directory specified in the profile option OM: Debug Log Directory.
6. In this directory, locate the file named <Random Number><Username>.dbg. This is the debug trace for the user and session.
7. As you read the debug trace file, keep in mind the following common reasons for discounts not being applied:
 - Discount list header is inactive.
 - Discount list header is ineffective as of the pricing date.
 - Source system code on discount list is not correct. (Look at this for Oracle iStore 11i orders.)
 - Discount list line is ineffective as of the pricing date.
 - Qualifiers for the discount list are not met.
 - Pricing attributes for the discount list are not met.
 - Discount list is getting eliminated by incompatibility.
 - Price break discount conditions are not met.

8.9.3 Finding the User's Price List

Use the following procedure to find out which price list the Oracle iStore 11i user is using.

Steps

1. Log in to the store as the user that you are testing.
2. Add an item to the cart.
3. Enter the following command in the browser address field:

```
javascript:alert(document.cookie)
```

The Oracle iStore 11i cookie values display in a long string with a format that looks like the following truncated example:

```
zs%3D<value of zs>zc%3D<value of zc>
```

4. Find the price list ID for the cart by querying the ASO_QUOTE_HEADERS_ALL table in SQL*Plus for quote_id = the value of zc in the cookie, as follows:

```
select price_list_id
```

```
from aso_quote_headers_all
where quote_header_id = <the value of zc>;
```

5. If PRICE_LIST_ID in the ASO_QUOTE_HEADERS_ALL table is null, then query the ASO_QUOTE_LINES_ALL table instead.

8.10 Shopping List Errors

To troubleshoot Shopping List, perform the following checks:

- Run `ctx_output.start_log("log")`
- Check the log file for errors in the program flow.
- Check whether data is stored or modified in the database table.
- Run SQL from the log files.
- Run PL/SQL scripts if a problem has occurred in the PL/SQL layer.

8.11 Search Errors

To troubleshoot Search errors, use the following checkpoints:

- Check the Search log file by executing `ctx_output.start_log('log')`.
- Check that Concurrent Manager is up and running.
- If searches are inaccurate, verify that `interMedia` was set up correctly. Refer to [Section 8.15, "Potential Issues Installing Oracle8i interMedia Text Version 8.1.7"](#).
- Look for data stored in the indexed search column.
- If you add multiple items that do not appear in the search table, re-run the Concurrent Manager program `Store Search Insert`. This program populates the search table in Oracle `iStore 11i` with product information from the Oracle Inventory tables.

Note: The search function goes offline while `Store Search Insert` is running.

- Verify that the `listener.ora` and `tnsnames` entries are correct so that the callout to the `.dll` can be made. For UNIX, refer to [Section 8.15, "Potential Issues Installing Oracle8i interMedia Text Version 8.1.7"](#).

For Windows NT, refer to the following example.

```
listener.ora
*****
LISTENER =
  (DESCRIPTION_LIST =
    (DESCRIPTION =
      (ADDRESS_LIST =
        (ADDRESS = (PROTOCOL = IPC)(KEY = EXTPROC0))
      )
      (ADDRESS_LIST =
        (ADDRESS = (PROTOCOL = TCP)(HOST = sthattil-pc)(PORT = 1521))
      )
    )
    (DESCRIPTION =
      (PROTOCOL_STACK =
        (PRESENTATION = GIOP)
        (SESSION = RAW)
      )
      (ADDRESS = (PROTOCOL = TCP)(HOST = sthattil-pc)(PORT = 2481))
    )
  )

SID_LIST_LISTENER =
  (SID_LIST =
    (SID_DESC =
      (SID_NAME = PlSExtProc)
      (ORACLE_HOME = E:\Oracle\Ora81)
      (PROGRAM = extproc)
    )
    (SID_DESC =
      (GLOBAL_DBNAME = ORCL)
      (ORACLE_HOME = E:\oracle\ora81)
      (SID_NAME = ORCL)
    )
  )

*****
tnsnames.ora
*****
EXTPROC_CONNECTION_DATA.US.ORACLE.COM =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = IPC)(KEY = EXTPROC0))
    )
  )
```

```
(CONNECT_DATA =  
  (SID = PLSExtProc)  
  (PRESENTATION = RO)  
)  
)
```

If the code is correct, refresh the `dr$libx` so it can find the `.dll` to create the index (my `oractxx8.dll` is in my `$ORACLE_HOME\bin` directory). The command to recreate the library is:

```
create or replace library dr$libx as 'e:\oracle\ora81\bin\oractxx8.dll';
```

Start the `ctxsrv` and re-index.

- If you have implemented category-level search and the search is not working, run the following search query in `SQL*Plus`:

```
select i.inventory_item_id, i.description, i.category_id,  
       score(100) nearness  
from ibe_ct_imedia_search i, mtl_system_items_b b  
where contains (i.indexed_search, 'laptop' , 100) > 0  
and i.language = userenv('LANG')  
and i.category_id = i.category_id  
and i.organization_id = 204  
and exists (  
  select 1  
  from jtf_dsp_section_items s, jtf_dsp_msite_sct_items b  
  where s.section_item_id = b.section_item_id  
  and b.mini_site_id = 10120  
  and s.inventory_item_id = i.inventory_item_id  
  and (s.end_date_active > sysdate or s.end_date_active is null)  
  and s.start_date_active < sysdate  
)  
and rownum < 200  
and i.inventory_item_id = b.inventory_item_id  
and i.organization_id = b.organization_id  
order by SCORE(100)  
/
```

The query will probably return `ORA` errors that indicate that the problem is with the environment, and not with the Oracle `iStore 11i` product search.

If the query returns search results instead, then file a bug on Oracle `iStore 11i` (product code 384, component `SEARCH`).

- If you get the error "IBE_DSP_J_GET_ITM_LST_FAIL: Unable to get list of product items in Merchant UI" when you try to perform a product search in the Merchant UI, then you are not including the wildcard character % in your search keyword. You must enter the wildcard character if you do not know the exact name of the product that you want. Alternatively, you can apply patch 1460870 to modify the code so that a wildcard character is automatically included if the search keyword field is left blank (null).

8.12 Notifications Errors

Use the following fixes for the errors listed below.

Notifications Subtab Does Not Appear in Merchant UI

If the Notifications subtab does not appear in the Merchant UI's Setup tab, use the following procedure to include it.

Steps

1. Create the notification function as follows:
 - a. Log into Oracle Forms with the Application Developer responsibility.
 - b. Choose **Application > Function**.
The Form Functions window opens.
 - c. In the Description tab, enter IBE_WF_NOTIFICATIONS in the Function field.
 - d. In the Description tab, enter iStore Notifications in the User Function Name field.
 - e. In the Web HTML field, enter ibemndsetup.jsp in the HTML Call field.
 - f. Save this record.
2. Add the notification function to the Setup tab submenu as follows:
 - a. Log into Oracle Forms with the System Administrator responsibility.
 - b. Choose **Application > Menu**.
The Menus form opens.
 - c. Choose **View > Find**, or click the flashlight icon on the toolbar to search for the Setup tab submenu.

The Find Menu window opens.

- d. In the Find field, search for and select **@Setup**.

The Menus form for @Setup (IBE_SETUP) opens.

- e. Add a new record to the menu entries, with the following values:
 - In the Seq field, enter 04.
 - In the Prompt field, enter *Notifications*.
 - In the Function field, choose **iStore Notifications** from the LOV.
 - In the Description field, enter *Setting up the workflow notifications*.
- f. Save your changes and quit Oracle Forms.

3. Launch the Oracle iStore 11i Merchant UI.

The Notifications subtab should now appear.

Notifications Are Not Delivered or Have Errors

This error occurs if you did not remove the access locks from the messages and items of the Oracle iStore 11i-related Oracle Workflow definition before upgrading Oracle iStore 11i. The patch or upgrade cannot overwrite the Oracle Workflow definition if you do not first remove the access locks.

Use the following procedure to back up the necessary customized messages, remove the access locks, and apply the patch or upgrade again to fix this error.

Steps

1. Open the Oracle Workflow data store file (IBENOTIF.wft) that contains this item type.
2. In Oracle Workflow Builder, back up the item type iStore Alerts Workflow (IBEALERT) as follows:
 - a. Choose **File > Save As**.

The Save As window opens.
 - b. In the Save As window, highlight the File radio button, enter the file name, and click **OK**.

3. Unlock all seeded objects, such as messages, in the database copy of the item type iStore Alerts Workflow (IBEALERT). To do so, perform the following steps for each seeded Oracle Workflow object in the item type:
 - a. Select the object.
 - b. Choose **Edit > Properties**.
The Navigator Control Properties window opens.
 - c. In the access tab, uncheck the options Preserve Customizations and Lock at this Access Level.
 - d. Click **OK**.
4. Save the Oracle Workflow data store file back to the database.
5. Apply the patch or upgrade to overwrite the existing Oracle iStore 11*i*-related Oracle Workflow definitions.

8.13 Storefront Reports Errors

If the Reports tab does not appear in the Merchant UI, use the following procedure to make the tab appear in the application menu. You can also use this procedure to add the Reports tab to other applications' menus.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Application > Menu**.
The Menus form opens.
3. Place the cursor in the Menu field.
4. Choose **View > Find**, or click the flashlight icon on the toolbar to search for iStore menus.
The Find Menu window opens.
5. In the Find field, enter `iStore`.
The iStore menu values appear in the Find Menu window.
6. Select **iStore** and click **OK**.
The Menus form for iStore (IBE_ALL_ROOT) opens.

Note: If you want to add the Reports tab to another application's menu, choose that menu instead. Users must have the IBE_ADMINISTRATOR responsibility before they can view Oracle iStore 11i Data Out Bins in another application.

7. Add a new record to the menu entries, with the following values:
 - a. In the Seq field, enter 09.
 - b. In the Prompt field, enter Reports.
 - c. In the Submenu field, choose **iStore Report Menu** from the LOV.
8. Save your changes and quit Oracle Forms.
9. Restart the Apache server.
10. Launch the Oracle iStore 11i Merchant UI.

The Reports tab should now appear.

8.14 Postsales Errors

To fix issues with Postsales, first verify that the following prerequisites were done.

- All the views in Postsales are "VALID" in the database.
- Regions exist in Apps. Use the developer responsibility AK Developer or Apps for the Web Manager.
- Shipments, invoices and payments were created by the merchant through ERP applications before trying to view them in Oracle iStore 11i.

Order Summary Page Records Out of Sequence

If the order summary page records are out of sequence, use search to locate an order.

Order Feedback Queue Errors

If you are experiencing order feedback queue errors, see *Oracle Order Capture Implementation Guide* for troubleshooting instructions.

8.15 Potential Issues Installing Oracle8i interMedia Text Version 8.1.7

Use the following procedures to troubleshoot problems installing Oracle8i interMedia Text Version 8.1.7.

8.15.1 Manually Installing ctxsys Data Dictionary

Data Dictionary Installation interMedia Text is integrated with the Oracle Database Creation Assistant (DBCA) so the ctxsys data dictionary should be installed when using this tool. If the ctxsys data dictionary does not install, use the following procedure to install it manually.

Prerequisites

- The interMedia Text files are installed.
- The database does not have a ctxsys user.
- The current directory is `*/ctx/admin`.
- You can `sqlplus internal`.

Steps

1. Create the ctxsys user and pass it the ctxsys password, default tablespace, and temporary tablespace as arguments.

```
sqlplus internal @dr0csys <password> <def_tblspc> <tmp_tblspc>
```

2. Install the data dictionary:

```
sqlplus ctxsys/<password> @dr0inst <ctxx_library>
```

The argument is the full path to the ctxx library, for instance:

```
sqlplus ctxsys/<password> @dr0inst $ORACLE_HOME/ctx/lib/libctxx8.so
```

3. Install appropriate language-specific default preferences. There are more than forty scripts in `*/ctx/admin/defaults` that create language-specific default preferences. They are named in the form `drdefXX.sql`, where `XX` is the language code (from the Server Reference Manual).

For instance, to install the US defaults:

```
sqlplus ctxsys/<password> @defaults/drdefus.sql
```

interMedia Text should now be installed and working.

8.15.2 Post-Installation Setup

If this database was an existing ConText site, make sure to remove `text_enable` from the `init.ora`. It is no longer used in Oracle8i, and will actually prevent Oracle8i from operating properly. You will get errors such as “Cannot find package DR_REWRITE.”

Ensure that the Net8 listener is running and is configured to invoke external procedures. A brief description of the process is below, and complete details are in *Oracle8i Server Administrator's Guide*.

Steps

1. Add an entry to the `tnsnames.ora`:

```
extproc_connection_data =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = ipc)
              (KEY = DBSID))
    (CONNECT_DATA = (SID = ep_agt1)))
```

DBSID is the database SID. `ep_agt1` can be named anything.

`extproc_connection_data` should not be changed.

2. Add the following to the listener `SID_LIST`:

```
SID_DESC = (SID_NAME = ep_agt1)
           (ORACLE_HOME = /oracle)
           (ENVS = LD_LIBRARY_PATH=/oracle/ctx/lib)
           (PROGRAM = extproc))
```

`ep_agt1` matches the `CONNECT_DATA` SID for `extproc_connection_data` in the `tnsnames.ora`. The `PROGRAM` section tells the Net8 listener to start the external procedure process. The `ENVS` section, which is shown here for UNIX, will ensure that the environment includes `*/ctx/lib` in `LD_LIBRARY_PATH`. This is needed so that indexing can use the INSO filters.

3. Since the `extproc_connection_data` `ADDRESS` section specifies `ipc`, make sure that the `ADDRESS_LIST` of `listener.ora` accepts `ipc` connections.

A quick way to test the Net8 configuration is to do:

```
exec ctx_output.start_log('log')
```

from SQL*Plus. If the setup was not performed correctly, you get the error,

```
DRG-50704: Net8 listener is not running or cannot start external procedures.
```

To troubleshoot this error, check the following possible causes:

- listener is not running.
- listener.ora is not configured for extproc.
- tnsnames.ora is not configured for extproc.
- listener does not accept ipc connections.

8.16 Reporting Issues

Use the following guidelines to report problems and file bugs.

Check store functionality in the following order:

1. Check whether all server processes (Oracle, TNS listener, WebDB listener, Forms server, Reports server, Apache, etc.) are up and running.
2. Check Oracle CRM Technology Foundation (JTT) login by going to:

`http://<host>:<apache port>/html/jtfllogin.jsp`

and trying to log in as SYSADMIN. If login fails, the problem is with JTT. File a bug on JTT (product code 1199).

3. Check the Oracle iStore 11i Merchant UI by logging in to:

`http://<host>:<apache port>/OA_HTML/jtfllogin.jsp`

with a store manager user name. (See [Section 5.1, "Setting Up Store Manager User Accounts"](#) for more information on creating the user name.) If login fails, the problem is with the Merchant UI. File a bug on Oracle iStore 11i (product code 384, component SPCLTYSTR).

4. Check the Customer UI by going to:

`http://<host>:<apache port>/OA_HTML/ibeCZzdMinisites.jsp`

and seeing if the store comes up. If not, file a bug on Oracle iStore 11i (product code 384). Use the error message as guidance for which component to specify in the bug.

Note: Make sure you have set up the guest user account before checking the Customer UI. See [Section 5.3, "Setting Up the Guest User Account"](#) for more information.

5. If the store comes up but there are problems adding items to the shopping cart and/or placing orders, check if Oracle Order Capture is working. Log in to Oracle Forms with the Order Capture Sales Manager responsibility, choose **Order Capture**, and enter a quote. (Refer to *Oracle Order Capture Concepts and Procedures* for instructions.) If Oracle Order Capture is not working, file a bug on Oracle Order Capture (product code 769). If Oracle Order Capture is working, file a bug on Oracle iStore 11i (product code 384, component SHPCRT).

Integrating Oracle iStore 11i with Oracle Advanced Supply Chain Planning

This chapter describes the integration of Oracle iStore 11i with Oracle Advanced Supply Chain Planning. Topics include:

- [Overview of Oracle Advanced Supply Chain Planning](#)
- [Setting Up Oracle Advanced Supply Chain Planning](#)

9.1 Overview of Oracle Advanced Supply Chain Planning

Oracle Advanced Supply Chain Planning is a comprehensive, Internet-based planning solution that decides when and where supplies such as inventory, purchase orders, and work orders should be deployed within an extended supply chain. It performs the supply planning function. Oracle Advanced Supply Chain Planning addresses the following key supply planning issues:

- Planning your supply chain in the least amount of time possible
 - Minimizing the number of plans and iterations
 - Planning your entire supply chain
- Involving your trading partners
- Accessing your plan from anywhere
- Improving your plans
- Planning all manufacturing methods

9.2 Setting Up Oracle Advanced Supply Chain Planning

Set up Oracle Advanced Supply Chain Planning for Global ATP if you want to provide global inventory availability information to your customers. As part of the rules for determining availability, you can provide sourcing rules that encompass orders already placed, open purchase orders, and other availability factors.

To set up the dependencies for ATP, perform the following tasks:

- Set up ATP in Oracle Manufacturing.
- Define ATP sourcing rules in Oracle Inventory.
- Enable product items for ATP by setting their ATP and ATP component flags in Oracle Inventory.
- Define an application instance.

For more details, refer to *Oracle Advanced Planning and Scheduling Implementation and User's Guide*, *Oracle Inventory User's Guide*, and *Oracle Order Management User's Guide*.

You must also set up Oracle Material Requirements Planning. See *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide* for more information.

Integrating Oracle iStore 11i with Oracle Configurator

This chapter describes the integration of Oracle iStore 11i with Oracle Configurator. Topics include:

- [Overview of Oracle Configurator](#)
- [Creating Configurable Product Models](#)
- [Oracle iStore 11i Functionality with Oracle Configurator](#)
- [Setting Up Oracle Configurator](#)
- [Testing the Oracle Configurator Setup](#)
- [Troubleshooting Oracle Configurator Integration](#)

10.1 Overview of Oracle Configurator

Oracle Configurator allows user configuration of complex items. It also provides guided selling, where the user is offered a list of choices or sequential questions to create a hierarchical list of items to view and purchase. Oracle Configurator is used to create product models and to help the buyer assemble related and dependent products in the shopping cart.

10.2 Creating Configurable Product Models

You can use the Configurator Developer UI to create the product models for dependent and related products, and to build rules around the products.

To be configurable in Oracle iStore 11*i*, a product model must have the following characteristics:

- The model and its associated option classes and standard items are defined in the Master Inventory Organization and assigned to the shipping organization.
- The model has a BOM item type of "Model" in Oracle Inventory, and its associated options have a BOM item type of "Option Class."
- The model and its associated options are published and orderable on the Web.
- The model and its associated option classes have a BOM structure defined in Oracle Bills of Material.
- The model and its components have been added to a price list. You can set the price of the option classes to zero if necessary, but they must be assigned to a price list.
- You have transferred the model and its components to the Oracle Configurator schema by running the Populate Configuration Models concurrent program from Oracle Manufacturing. (Choose **Flow Manufacturing > Setup > Other > Configurator > Populate Configuration Models.**)
- If you changed the model and its components in Oracle Order Management after you populated it into the Oracle Configurator schema, then you must run the Refresh Configuration Models concurrent program from Oracle Manufacturing. (Choose **Flow Manufacturing > Setup > Other > Configurator > Refresh Configuration Models.**)

The product models are imported initially from BOM models. You can use the Configurator Developer UI to create a tree structure for the product model. For example, if customers want to build their own laptops from a store of electronic items, then you can use the Configurator Developer UI to define the structure and

the dependent (mandatory and optional) products (e.g., a 15" or 17" screen with 16MB or 32MB RAM and 6GB or 8GB drive).

10.3 Oracle iStore 11i Functionality with Oracle Configurator

When the customer is browsing items in an Oracle iStore 11i store, a **Configure** button appears next to each configurable item. Configurable items have a BOM item type of "Model" in Oracle Inventory and are associated with a Configurator UI.

When the user clicks **Configure**, the store sends a message to populate the Configurator UI with the item ID. The Configurator UI appears in the frame provided in an Oracle iStore 11i page. Here, the related or dependent products can be assembled for placing the order. Once the customer has finished building the list of selected items for the order, clicking **Done** in the Configurator UI's top menu bar places all the items in the shopping cart. The configuration must be complete and valid before the customer can add it to the shopping cart.

Launching Oracle Configurator from Oracle iStore 11i is not supported if users are connected to your stores through Secure Socket Layer (SSL) network connections.

See *Oracle Configurator Developer User's Guide* for detailed setup documentation.

10.3.1 Retrieving the Configurator UI

Oracle iStore 11i gets the Configurator UI via the Oracle Configurator Servlet URL, which handles all interaction between the client and the server. The URL is the location where the Oracle Configurator servlet resides. The installer of the servlet sets up this URL. For example, the URL could be

```
http://apps-server-host:8800/oa_servlets/oracle.apps.cz.servlet.UiServlet
```

The server and directory structure are installation-specific information that the calling application must read, but the `oracle.apps.cz.servlet.UiServlet` portion is always the same. Oracle iStore 11i reads this URL from the profile option BOM: Configurator URL of UI Manager. Set this profile option to the correct URL. You must also set the profile option ASO: Configurator URL to the same URL.

10.3.2 Changing the Oracle Configurator UI

The Configurator UI is created with DHTML or a Java applet. The look and feel are similar to the Oracle iStore 11i UI. If you want to change the Configurator UI, you can modify the HTML templates for Oracle Configurator. These templates are loaded in Oracle iStore 11i's `html` directory on the same server by default. The Oracle Configurator data is stored in the CZ tables in the APPS schema.

If you change the UI for a model in Oracle Configurator Developer, you must restart the Apache server and clear the cache before the new UI is available in Oracle iStore 11i.

10.4 Setting Up Oracle Configurator

Use the following procedure to integrate Oracle iStore 11i with Oracle Configurator.

Prerequisites

- Rapid Install is complete.
- The file `env.txt`, located in the `$COMMON_TOP/html` directory, defines the directory that the variable `$FND_TOP` represents. The content of the file should be similar to the following example:

```
FND_TOP=/<root path>/<database or environment name>/fnd/11.5.0
```
- You have set up and tested the Oracle Configurator servlet.
- You have built Configurator UIs for the configurable items that you plan to sell.

Steps

1. In Oracle Inventory, make sure that every item that can be shown for a configured item, from the root model item to every option class and every leaf node, is set with the following flags in the Master Item form:
 - Web Status = **Published**
 - Orderable on the Web
 - Customer Orders Enabled
2. In Oracle Pricing, make sure that every item that can be shown for a configured item is added to the price list that will be used by the store and customer, even if it has a zero price.

3. Log in to Oracle Forms with the System Administrator responsibility and set the profile option BOM: Configurator URL of UI Manager at site, iStore application, and IBE_CUSTOMER responsibility level to the Oracle Configurator Servlet URL:

```
http://<host>:<apache port>/<servlet zone>/oracle.apps.cz.servlet.UiServlet
```

The values for the host, Apache port, and servlet zone are determined by your Apache server configuration. See [Section A.11, "Oracle Bills of Material \(BOM\) Profile Options"](#) for more information about this profile option.

4. Set the profile option ASO: Configurator URL to the same value as BOM: Configurator URL of UI Manager. See [Section A.8, "Oracle Order Capture \(ASO\) Profile Options"](#) for more information about this profile option.
5. Edit the database instance's Database Configuration (".dbc") file. The .dbc file enables connection to the database and is installed in the \$FND_TOP/secure/ directory. The following edits are required in addition to any configuration settings that are required by other Oracle applications:
 - Only Oracle thin drivers are supported, so uncomment: APPS_JDBC_DRIVER_TYPE=THIN
 - Add the following line and replace the item between brackets with the appropriate value: BATCH_VALIDATE_USER=[Applications Username of the Guest]
 - Add the following line and replace the item between brackets with the appropriate value: BATCH_VALIDATE_PWD=[Applications Password of the Guest]
 - Uncomment the following line and replace "host_name" with the appropriate value: DB_HOST=host_name
 - Uncomment the following line and replace "port_number" with the appropriate value: DB_PORT=port_number
 - Uncomment the following line and replace "database_name" with the appropriate value: DB_NAME=database_name
6. The jserv.properties file must have the template URL defined as follows (these URLs must be able to be resolved when entered into a browser):

```
wrapper.bin.parameters=-Dcz.uiservlet.templateurl=http://<host>:<apache port>/OA_HTML/US/czFraNS.htm
wrapper.bin.parameters=-Dcz.uiservlet.templateurl.ie=http://<host>:<apache port>/OA_HTML/US/czFraIE.htm
```

7. In the Oracle iStore 11i Merchant UI, add the model item to some part of the catalog to be displayed.

10.5 Testing the Oracle Configurator Setup

Use the following procedure to test the Oracle Configurator setup.

Prerequisites

You have enabled cookies for both the browser and the middle tier. Oracle Configurator requires cookies.

Steps

1. Test that the Oracle Configurator middle tier servlet is running and getting the Oracle Configurator version, by entering the following URL in the browser:

```
http://<host>:<apache port>/<servlet zone>/oracle.apps.cz.servlet.UiServlet?
test=version
```

The browser should return a message similar to the following statement:

```
Using configuration software build: 11.5.1.14.27 Expecting schema: 14c
```

2. Create the Configurator Standalone Test Page by writing the following lines into an HTML file with an .htm file name extension.

```
<!------->
|           Copyright (c)2000 Oracle Corporation, Redwood Shores, CA
|                               All rights reserved.
+-----+
|
| FILE
|   Configurator Standalone Test Page
|
| DESCRIPTION
|   This page posts an initialize message to the Configurator Servlet
|   in order to provide an test of the middle tier, isolated from the
|   rest of iStore.
|
|   To use this page, read the comments below and replace the values in []
|   with values specific to your implementation. Remove the []'s too.
|   Remember to edit the form action near the bottom of the page.
|   Then open the page in a browser and click the Launch DHTML button.
+----->
```

```

<HTML>
<HEAD>
<TITLE>Configurator Standalone Test Page</TITLE>
<SCRIPT LANGUAGE=javascript>
<!--
  //globals
    var ns4 = (document.layers)? true : false;
    var ie4 = (document.all)? true : false;

    function submitXML1 () {
      var xmlValue = '';
      xmlValue += '<initialize>';
//Replace the file name with the implemented dbc filename:
      xmlValue += '<param name="database_id">[dbcfilename.dbc]</param>';
//Replace the value with the inventory info of the configurable model item:
      xmlValue += '<param name="model_id">[1234]</param> ';
      xmlValue += '<param name="model_uom">[Ea]</param> ';
      xmlValue += '<param name="model_quantity">1</param> ';
//Try to use an icx session ticket retrieved from a logged init message
      xmlValue += '<param name="icx_session_ticket">CB3E55CF36C0AECDC
        </param> ';
//This responsibility ID is currently irrelevant
      xmlValue += '<param name="responsibility_id">22372</param> ';
//Enter the appropriate application ID (usually, it will be 671 for iStore)
      xmlValue += '<param name="calling_application_id">[671]</param> ';
//Enter the organization ID for the configurable item:
      xmlValue += '<param name="context_org_id">[123]</param> ';
//Use any date earlier than the current sysdate
      xmlValue += '<param name="config_creation_date">[06-1-2000]
        </param> ';
//Do not change the UI type for this test:
      xmlValue += '<param name="ui_type">DHTML</param>';
//If the jserv properties are not correctly defined, the template URL can be
//defined here:
//      xmlValue += '<param name="template_url">
//        http://[machine]:[port]/OA_HTML/US/czIFrame.htm</param>';

//Alternate way of connecting to the database if the dbc file is not working
//(replaces database_id)
//      xmlValue += '<param name="alt_database_name">
//        jdbc:oracle:thin:@[machine]:[port]:[sid]</param>';
//      xmlValue += '<param name="user">[login]</param>';
//      xmlValue += '<param name="pwd">[password]</param>';
//      xmlValue += '<param name="gwyuid">[login]/[password]</param>';
//Alternate way of specifying which DHTML UI to launch (replaces model_id

```

```
//and context_ord_id)
//      xmlValue += '<param name="ui_def_id">[1234]</param>';

      xmlValue += '</initialize>';
      submitXML (xmlValue);
    }

function submitXML (xml) {
  if (ns4) {
    document.form1.XMLmsg.value = xml;
    document.form1.submit ();
  } else if (ie4) {
    form1.XMLmsg.value = xml;
    form1.submit();
  }
}

//-->
</SCRIPT>
</HEAD>
<BODY>
<FORM
action="http://[machine]:[port]/servlets/oracle.apps.cz.servlet.UiServlet"
method=POST
id=form1 name=form1>
<input type="hidden" name="XMLmsg" value=''>
</FORM>

<FORM action="" method=POST id=form2 name=form2>
<INPUT type="button" value="Launch DHTML" id=button1 name=button1
onclick="javascript:submitXML1();">
</FORM>
</BODY>
</HTML>
```

3. Edit the fields in the Configurator Standalone Test Page as explained in the comment lines.
4. Open the Configurator Standalone Test Page in a browser.
5. In the Configurator Standalone Test Page, click **Launch DHTML**.
The UI should appear.

10.6 Troubleshooting Oracle Configurator Integration

This section lists checkpoints and fixes that you can use to resolve common Oracle Configurator integration errors. You can also use the Oracle Configurator initialize and terminate messages in the Oracle iStore 11i Java log file as diagnostic tools.

10.6.1 The Initialize and Terminate Messages

The Oracle iStore 11i Java log file displays the XML messages that launch and close Oracle Configurator. Search for the words "initialize_string" and "terminate message" to find the XML strings that are used to launch and return from Oracle Configurator, respectively. See [Section 10.6.2, "Common Oracle Configurator Integration Errors"](#) for instructions on reviewing these messages for possible errors.

The Initialize Message

The initialize message should be similar to the following example:

```
<initialize xmlns:cfg="http://appserverhost/apps/cz/cz-javaClient.dtd">
<param name="database_id">ap123sun_dbc</param>
<param name="icx_session_ticket">26A50EB218A8C8D6</param>
<param name="ui_type">DHTML</param>
<param name="context_org_id">204</param>
<param name="model_id">137</param>
<param name="model_quantity">1</param>
<param name="model_uom">Ea</param>
<param name="config_creation_date">07-30-2001-11-14-39</param>
<param name="calling_application_id">671</param>
<param name="responsibility_id">22372</param>
<param name="ibe_back_fail">ibeCScdViewA.jsp</param>
<param name="ibe_back_success">ibeCScdViewA.jsp</param>
<param name="return_url">http://ap123sun:12345/html/ibeCFgpRedirect.jsp
  </param>
<param name="template_url">http://ap123sun:12345/OA_HTML/US/czIFrame.htm
  </param>
<param name="pricing_package_name">aso_cfg_pub</param>
<param name="price_mult_items_proc">Pricing_Callback</param>
<param name="configurator_session_key">6832-1</param>
<param name="ibe_cart_line_id">6832</param>
<param name="ibe_cart_id">2634</param>
</initialize>
```

The Terminate Message

The terminate message should be similar to the following example:

```
<?xml version="1.0"?>
<terminate>
<config_header_id>3240</config_header_id>
<config_rev_nbr>1</config_rev_nbr>
<valid_configuration>true</valid_configuration>
<complete_configuration>true</complete_configuration>
<exit>save</exit>
<total_price>782.00</total_price>
<prices_calculated_flag>true</prices_calculated_flag>
<config_outputs>
---- a series of options like the one following ----
<option>
<ps_node_id>2085</ps_node_id>
<selection_line_id>9664</selection_line_id>
<parent_line_id>9665</parent_line_id>
<quantity>1</quantity>
<list_price>0.00</list_price>
<discounted_price>0.00</discounted_price>
</option>
---- and then the end ----
</config_outputs>
<config_messages></config_messages>
</terminate>
```

A Terminate Message With an Error

A terminate message for an error looks like the following example:

```
<?xml version="1.0"?>
<terminate>
<exit>error</exit>
<config_messages>
<message>
<message_type>error</message_type>
<message_text>java.lang.NoClassDefFoundError: oracle/apps/cz/logic/Engine
  </message_text>
</message>
</config_messages>
</terminate>
```

10.6.2 Common Oracle Configurator Integration Errors

This section lists checkpoints and fixes for common Oracle Configurator integration errors.

Configurable Item Does Not Appear in the Catalog

This error happens when the item is not published to the storefront correctly.

- Check that you have added the item to a published store section.
- In Oracle Inventory, confirm that the item's Web Status is **Published**.

Configure Button Does Not Appear After Generating the Model

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Make sure the model was populated for the Master Inventory Organization. Using the Bills of Material responsibility, run the Populate Configuration Models concurrent program for the model and choose the value of the profile option IBE: Item Validation Organization for the Organization parameter.
- Check that all of the model's option classes and components are on the price list that is defined for the user, and that they have prices.
- In Oracle Inventory, check that the item has the properties Orderable on the Web and Web Status = **Published**.
- Check that a Configurator UI exists for the model, using the following SQL query:

```
select cz_cf_api.ui_for_item
(<item_id>,<org_id>,sysdate,'DHTML',-1,1234,<appid - iStore is 671>)
from dual;
```

For example, see the following SQL statement:

```
select cz_cf_api.ui_for_item
(137,204,sysdate,'DHTML',-1,1234,671)
from dual;
```

If the SQL query returns a non-null value, the Configurator UI exists.

If the query returns a null value, the cause is one of the following cases:

- No Configurator UI exists for the model. You must use Oracle Configurator Developer to build a Configurator UI.

- A Configurator UI exists for the model, but it is not published for the user's application (usually Oracle iStore 11i). In Oracle Configurator Developer, check that the model is in Complete status and includes Oracle iStore 11i (IBE) as an application, then publish the Configurator UI. If the user's application ID is something other than 671 for Oracle iStore 11i, the model's Configurator UI must be published for that application too. You can check the user's application ID in the cookie and in the initialize message from the Oracle iStore 11i Java log file. Once the Configurator UI is published, you must restart the Apache server and clear the cache to make the Configurator UI available.
- When the **Configure** button appears for a configurable item after completing these fixes or any other fixes, you should first try to add a standard item to the shopping cart. If you cannot add the standard item, then the issue is with the shopping cart and you will not be able to add a configurable item.

Clicking the Configure Button Does Not Launch the Configurator UI

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Make sure the value of the profile option BOM: Configurator URL of UI Manager is valid. Remember to check the machine name, domain name, port number, and servlet zone.
- Test that Oracle Configurator itself has been installed correctly and that the servlet is running, as described in [Section 10.5, "Testing the Oracle Configurator Setup"](#).
- Check that the Oracle Configurator HTML pages exist by navigating to:

```
http://<host>:<apache port>/OA_HTML/US/czIFrame.htm
```

Your browser should display a row of four buttons, labeled **Summary**, **Availability**, **Done**, and **Cancel**.

- Verify that the database instance's .dbc file is in the \$FND_TOP/secure directory.
- Check that the correct \$FND_TOP directory is specified in the \$COMMON_TOP/html/env.txt file.
- Check that cookies are turned on for both the browser and the middle tier.

- Check the Oracle iStore 11i Java log file's initialize and terminate messages for Oracle Configurator. Review the log messages to find possible errors, such as references to other environments and missing or incorrect values.
- Check that Oracle Configurator can run independently of Oracle iStore 11i by using the Configurator Standalone Test Page described in [Section 10.5, "Testing the Oracle Configurator Setup"](#). If you have the initialize message from the Oracle iStore 11i Java log file, edit the Configurator Standalone Test Page to include the message's values. When you click **Launch DHTML** in the page, the UI should launch and run, and you should be able to click **Done** and see summary information. If the UI does not launch or you cannot see summary information, there is a middle tier setup issue.

Clicking the Configure Button Returns IBE_ORD_CAUGHT_ERR

This error occurs when profile options have not been set up correctly.

- Verify that all required profile options have been set up.

Blank Screen

This error can occur for a variety of reasons. Check the Oracle Configurator UI log files for the errors listed below, and use the fix described for the error. The Oracle Configurator UI log files are named `cz_exc__.log`. They are located in the `$OAH_TOP/util/apache/1.3.9/Apache/logs/` directory or the `$APACHE_TOP/Jserv/logs` directory.

- **Database Connection Error**—The `.dbc` file has not been set up correctly. Set up the `.dbc` file using the guidelines in [Section 10.4, "Setting Up Oracle Configurator"](#).
- **Socket Connection Error**—The Apache server is not running. Restart the Apache server.
- **Data/End of Communication Error**—The Apache server is not running. Restart the Apache server.
- **Unsatisfied Link Error**—The `LD_LIBRARY_PATH` and shared library linking are not correct. Correct the `LD_LIBRARY_PATH` and shared library linking.
- **OCI8/Thick Driver Error**—The thin driver is not specified in the `.dbc` file. Edit the `.dbc` file to specify the thin driver.
- **Other Errors**—The profile option that identifies the Configurator URL has an invalid value. Enter the correct URL as the value of the profile options BOM: Configurator URL of UI Manager and ASO: Configurator URL.

Clicking Done in the Configurator UI Does Not Return User to Cart Page

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Check that the item configuration is complete and valid.
- Check the terminate message in the Oracle iStore 11i Java log file to see if Oracle Configurator returned an error. If so, there is an issue with the Oracle Configurator setup.

Items in a Configuration Have Null Descriptions in the Cart

This error happens when the items are not set up correctly in Oracle Inventory.

- In Oracle Inventory, check that the items have the properties Orderable on the Web and Web Status = **Published**.

Cannot Create an Order with a Configured Item

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Verify that carts holding only standard items can be placed as orders. If not, then the issue is not necessarily related to Oracle Configurator.
- In Oracle Order Management, check that for the Standard transaction type, a line flow has been defined for the item's User Item Type. For example, if the User Item Type is ATO Model, then verify that a line flow for the Item Type ATO Model has been defined for the Standard transaction type.

Integrating Oracle iStore 11i with Oracle Contracts for Sales

This chapter describes the integration of Oracle iStore 11i with Oracle Contracts for Sales. Topics include:

- [Overview of Oracle Contracts for Sales](#)
- [Oracle iStore 11i Functionality with Oracle Contracts for Sales](#)
- [Setting Up Oracle Contracts for Sales](#)

11.1 Overview of Oracle Contracts for Sales

Oracle Contracts for Sales automates the full life cycle of a contract for online selling. You can author, execute and control non-industry specific contracts with Oracle Contracts for Sales. Oracle Contracts for Sales also acts as a central repository for the collection and dissemination of contract information. It contains all data on terms and conditions, deliverables, and parties to the contracts.

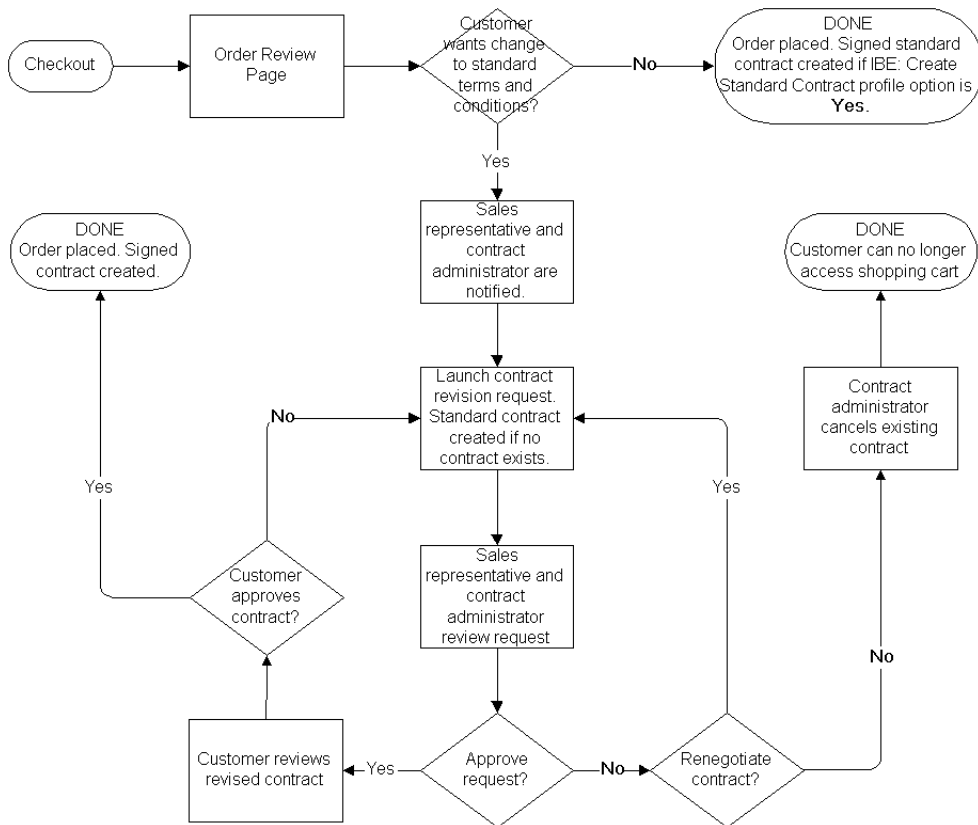
11.2 Oracle iStore 11i Functionality with Oracle Contracts for Sales

You can integrate Oracle iStore 11i with Oracle Contracts for Sales to enable contract creation and negotiation in Web stores. This contract functionality has two major features:

- Customers can review standard terms and conditions in the storefront when they proceed to checkout. Oracle iStore 11i retrieves the standard terms and conditions from a contract template.
- Customers can accept or reject the contract terms in the storefront. If customers reject the terms, Oracle iStore 11i initiates an online contract negotiation process.

You must set up a standard contract template in Oracle Contracts for Sales for use with all initial quotes. You can set up different standard contract templates for each Oracle iStore 11i customer responsibility.

The following diagram shows the process flow for contract creation and negotiation in Oracle iStore 11i.

Figure 11–1 Process Flow for Oracle iStore 11i Contracts

When customers proceed to checkout with a shopping cart, Oracle iStore 11i displays the terms and conditions of the standard contract in the order review page and asks the customers to agree or disagree.

If the customers agree with the terms and conditions, they can place the order. At this point, a standard contract in the signed state is created if the profile option IBE: Create Standard Contract is set to **Yes**. The standard contract is associated with the quote number.

If the customers disagree with the terms and conditions, the following sequence of events takes place:

1. Oracle iStore 11i forces the customers to save the shopping cart.

2. The customers must enter a reason for their disagreement in a text field. These comments are associated with the contract created by the application.
3. The standard contract is created and associated with the shopping cart.
4. Oracle iStore 11i sends an e-mail to the sales representative, contract administrator, and customer with the quote number and contract ID. The sales representative's e-mail is specified in Oracle Human Resources for each of your organizations. The contract administrator is set up in Oracle Contracts for Sales, and also in Oracle CRM Application Foundation as a CRM Resource.
5. The contract administrator looks at the quote and the customer's reason for disagreeing with the standard terms and conditions.
6. If the contract administrator approves the requested change in terms and conditions, the customer and the sales representative are notified automatically through Oracle Workflow. At this point, the customer can either place the order, which creates the revised contract in the signed state, or disagree with the terms and conditions again, which repeats the process of notifying the contract administrator and sales representative. The customer cannot otherwise modify the cart.
7. If the contract administrator rejects the requested change in terms and conditions, the sales representative is notified and decides whether the contract administrator should pursue negotiation or cancel the contract.
8. If the contract administrator pursues negotiation, the negotiation continues until the contract is either approved or cancelled.
9. If the contract administrator cancels the contract, the customer cannot modify or checkout the shopping cart.

11.3 Setting Up Oracle Contracts for Sales

Use the following procedure to set up contract functionality in Oracle iStore 11i.

Prerequisites

- You have created at least one contract template in Oracle Contracts for Sales. See *Oracle Contracts for Sales Concepts and Procedures* for details.
- The sales representatives and contract administrators have Oracle Applications user names. See *Oracle Applications System Administrator's Guide* for details.
- Oracle Workflow's Notification Mailer is set up. See *Oracle Workflow Guide* for details.

- The contract administrators are set up as employees in Oracle Human Resources.

Steps

1. Set the profile options associated with Oracle Contracts integration:
 - Set the profile option ASO: Enable Use Contracts to **Yes** at the iStore application level.
 - Set the profile options IBE: Create Standard Contract and IBE: Notification User Role at the iStore application level according to your business needs.
 - Set the profile option IBE: Use Workflow Features in iStore at the iStore application level to **Yes**.
 - Set the profile options OKC: Change Request Approver, OKC: Contract Approver, OKC: Contract template for standard terms and conditions, OKC: Default contract administrator for notifications, OKC: Notify administrator about new contract from iStore, and OKC: User Directory.
 - Optional: Set the profile option OKC: Default group for contracts created from quote.

See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#), [Section A.8, "Oracle Order Capture \(ASO\) Profile Options"](#), and [Section A.12, "Oracle Contracts Core \(OKC\) Profile Options"](#) for profile option descriptions and setup procedures.

2. For each of your organizations, set up the default sales representative user who will receive the contract-related notifications, as described in [Section 5.9.2, "Setting Up Notification Recipients"](#).
3. Set up contract administrators as CRM Resources, as follows:
 - a. Log in to Oracle Forms with the CRM Resource Manager responsibility.
 - b. Choose **Maintain Resources > Import Resources**.
The Selection Criterion window opens.
 - c. Choose **Employee** from the Resource Category pull-down menu, and enter your other search criteria in the Selection Criterion window.
 - d. Click **Search**.
The search results appear in the Search Results region of the Selection Criterion window.

- e. Check the Select checkbox next to the person that you are setting up as a contract administrator.
 - f. Click **Create Resource**.
The Default Values window opens.
 - g. Optional: You can enter active dates, manager's name, and role information in this window.
 - h. Click **OK**.
The Selected Resources window opens, showing the contract administrator as a resource.
 - i. Check the Select checkbox next to the contract administrator's resource record and click **Save Resource**.
The contract administrator is now saved as a CRM Resource.
 - j. Click **Details**.
The Resource form for the contract administrator opens.
 - k. In the Roles tab, choose **Contracts** from the Role Type LOV and **Contracts Administrator** from the Role LOV.
 - l. Save the record.
 - m. Switch to the System Administrator responsibility, and make sure the contract administrator has a user name.
4. Set up the workflow for notifications that are sent to contract administrators, as follows:
- a. Log in to Oracle Forms with the System Administrator responsibility.
 - b. Choose **Requests > Run**.
The Submit a New Request window opens.
 - c. Choose **Single Request** and click **OK**.
The Submit Request window opens.
 - d. Choose **Workflow Background Process** from the Name LOV.
The Parameters window opens.
 - e. Set the following parameters for the item type **Contract Approval** and click **OK**:

- Item Type: **Contract Approval**
- Process Deferred: **Yes**
- Process Timeout: **Yes**

The Submit Request window is populated with these parameters.

- f. Place the cursor in the Parameters field.

The Parameters window opens.

- g. Set the following parameters for the item type **Contract Alert** and click **OK**:
 - Item Type: **Contract Alert**
 - Process Deferred: **Yes**
 - Process Timeout: **Yes**

The Submit Request window is populated with these parameters.

- h. Click **Submit** to submit the request.

5. Set up contracts-related notifications for customers and sales representatives in Oracle Workflow and Oracle iStore 11i. See [Section 5.9, "Setting Up Notifications"](#) and [Chapter 17, "Integrating Oracle iStore 11i with Oracle Workflow"](#) for details.

Integrating Oracle iStore 11*i* with Oracle iPayment

This chapter describes the integration of Oracle iStore 11*i* with Oracle iPayment. Topics include:

- [Overview of Oracle iPayment](#)
- [Setting Up Oracle iPayment](#)

12.1 Overview of Oracle iPayment

Oracle iPayment provides an integrated electronic payment solution for both electronic commerce applications and client-server applications. It offers user-friendly access and control of payment processing to these applications. Oracle iPayment supports two electronic payment methods: credit card payments and bank account transfers. It also supports payment partners.

Oracle iPayment has easy installation, administration, and extension capabilities. Its risk management functionality can quantify and identify fraudulent online transactions for both B2B and B2C models.

Because there are few standards in electronic commerce and payment processing, Oracle iPayment supports several routing options, payment methods, processing models, and security features.

12.2 Setting Up Oracle iPayment

If you are planning to provide credit card payment options, then you must set up Oracle iPayment to perform credit card authorization and fund capture. In your setup, you can determine whether authorization occurs when the order is being placed or at a later time. See *Oracle iPayment Implementation Guide*, *Oracle Order Management User's Guide*, and *Oracle Receivables User's Guide* for additional setups required for Oracle iPayment, including how to set up the Oracle iPayment system to communicate with the provider networks.

Use the following procedure to set up credit card payment functionality in Oracle iStore 11i.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Profile > System**.
3. Query Application = iStore, User = ibe_customer, and set the following profile option values at the iStore application level:
 - a. iStore Setup Profile Options
Set the IBE: Authorize Payment Offline During Normal Checkout profile option to **No** to allow only online authorization.
Set the IBE: Finalize Order On Error in Authorize Payment profile option to **Yes** to submit orders even if the authorize payment error is a system error.

Integrating Oracle iStore 11*i* with Oracle iSupport

This chapter describes the integration of Oracle iStore 11*i* with Oracle iSupport. Topics include:

- [Overview of Oracle iSupport](#)
- [Setting Up Oracle iSupport](#)

13.1 Overview of Oracle iSupport

Oracle iSupport is a comprehensive Web-based customer service portal that empowers the users to receive self service and assisted service over the Internet. It provides a personalized self service experience to users for many functions.

A large majority of customer support questions are repetitive. By empowering the users to request service for their common support questions over the Internet and offering automated response mechanisms, Oracle iSupport enables service organizations to reduce the total cost of customer support.

Service organizations can increase customer satisfaction and remain competitive by empowering customers through self-service and self-administration. Not only does iSupport allow the users to take control of their support experience, but it also enables a support organization to provide closed loop customer support by seamlessly integrating with Oracle Telephony Manager, the call center-enabled agent-facing application.

Oracle iSupport accomplishes the following goals for a service organization:

- Reduces customer support costs by empowering customers to perform self-service tasks such as creating and tracking their service requests
- Enhances customer satisfaction by providing easy access to the same product information and knowledge base that the support organization uses to resolve customer issues
- Provides real time online transactional inquiries to customers on orders, returns, invoices, contracts, and payments
- Provides a platform for users to collaborate among themselves through forums

13.2 Setting Up Oracle iSupport

Oracle iStore 11i provides call-me-back functionality whereby customers can click a link in the Customer UI's welcome bin to request a call from a merchant representative. The call request is processed in the Oracle Telephony Manager call center.

The callback feature requires integration of Oracle iStore 11i with Oracle iSupport and Oracle Telephony Manager. See *Oracle iSupport Implementation Guide* for details. After setting up Oracle iSupport and Oracle Telephony Manager, set the profile option IBE: Use Call Me Back to **Yes** to activate the callback feature. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for information on setting this profile option.

Integrating Oracle iStore 11i with Oracle Marketing Online

This chapter describes the integration of Oracle iStore 11*i* with Oracle Marketing Online. Topics include:

- [Overview of Oracle Marketing Online](#)
- [Setting Up Oracle Marketing Online](#)

14.1 Overview of Oracle Marketing Online

Oracle Marketing Online is a complete marketing automation software application. It helps companies to win and retain profitable customers by enabling marketers to plan, execute, analyze, and optimize overlapping customer-focused programs.

Oracle Marketing Online provides a complete solution for building targeted marketing campaigns, executing campaigns through multiple channels, modifying promotions at any time, and measuring the results to determine the most effective and profitable marketing activities. This automated, closed loop process enables marketers to follow campaigns all the way through from demand creation to revenue recognition.

Oracle Marketing Online allows marketers to track, coordinate, and analyze marketing results from all communication channels in real time. This capability allows marketers to use real-time data for decision making. They can quickly allocate additional resources to successful campaigns or redefine targets of non-performing campaigns without waiting until a campaign is completed. At any point in the campaign execution, marketers can modify any element of the campaign and track results accordingly.

14.2 Setting Up Oracle Marketing Online

You can use the eMerchandising module of Oracle Marketing Online to personalize Oracle iStore 11i stores and make recommendations for customers. See *Oracle Marketing Online Implementation Guide* for information about setting up Oracle Marketing Online.

Store personalization and customer-specific recommendations are accomplished through storefront postings from eMerchandising and store event capture.

14.2.1 Storefront Postings

You can create postings in Oracle Marketing Online's eMerchandising, create rules that determine the content for a given posting, and associate each posting with a placement on an Oracle iStore 11i storefront page. You must also set the profile option IBE: Use Web Placements to **Yes** to enable eMerchandising postings in the storefront placements.

The placements are bins on the common storefront page layouts. The seeded catalog section and item pages each have seven left bins, seven right bins, one top bin, and one bottom bin. The seeded shopping cart pages each have one top bin and one

bottom bin. Each bin is listed as a separate logical template in the Oracle iStore 11i template manager.

After creating eMerchandising postings in Oracle Marketing Online, you modify Oracle iStore 11i physical templates to make reference to posting tags, and associate each physical template with the logical template for the bin where you want the posting to appear.

When a user views your specialty store online, the Oracle iStore 11i template that references the posting tag passes the user's party ID, specialty store, page type (section, item, or shopping cart), and top-level section ID or item ID if applicable, to Oracle Marketing Online. The Oracle iStore 11i template also passes its bin location. Oracle Marketing Online's eMerchandising module creates a storefront posting for the corresponding placement.

The following table lists the logical template names for the bins on the catalog section, catalog item, and shopping cart pages. See *Oracle iStore Concepts and Procedures* for more information about customizing the bins.

Table 14–1 Logical Template Names for Bins

Catalog Section Pages	Catalog Item Pages	Shopping Cart Pages
STORE_CTLG_BIN_LEFT_1	STORE_CTLG_ITEM_BIN_LEFT_1	STORE_CART_ITEMS_BIN_TOP
STORE_CTLG_BIN_LEFT_2	STORE_CTLG_ITEM_BIN_LEFT_2	
STORE_CTLG_BIN_LEFT_3	STORE_CTLG_ITEM_BIN_LEFT_3	STORE_CART_ITEMS_BIN_BOTTOM
STORE_CTLG_BIN_LEFT_4	STORE_CTLG_ITEM_BIN_LEFT_4	
STORE_CTLG_BIN_LEFT_5	STORE_CTLG_ITEM_BIN_LEFT_5	
STORE_CTLG_BIN_LEFT_6	STORE_CTLG_ITEM_BIN_LEFT_6	
STORE_CTLG_BIN_LEFT_7	STORE_CTLG_ITEM_BIN_LEFT_7	
STORE_CTLG_BIN_RIGHT_1	STORE_CTLG_ITEM_BIN_RIGHT_1	
STORE_CTLG_BIN_RIGHT_2	STORE_CTLG_ITEM_BIN_RIGHT_2	
STORE_CTLG_BIN_RIGHT_3	STORE_CTLG_ITEM_BIN_RIGHT_3	
STORE_CTLG_BIN_RIGHT_4	STORE_CTLG_ITEM_BIN_RIGHT_4	
STORE_CTLG_BIN_RIGHT_5	STORE_CTLG_ITEM_BIN_RIGHT_5	
STORE_CTLG_BIN_RIGHT_6	STORE_CTLG_ITEM_BIN_RIGHT_6	
STORE_CTLG_BIN_RIGHT_7	STORE_CTLG_ITEM_BIN_RIGHT_7	
STORE_CTLG_SECTION_BIN_TOP	STORE_CTLG_ITEM_BIN_TOP	
STORE_CTLG_SECTION_BIN_BOTTOM	STORE_CTLG_ITEM_BIN_BOTTOM	

14.2.2 Event Capture

Oracle iStore 11*i* can capture the following important events during users' visits to Web stores:

- Anonymous user registration
- Registered user login
- Click on an item to view its detail
- Add an item to the shopping cart
- Remove an item from the shopping cart
- Place an order

When an event occurs, Oracle iStore 11*i* calls an eMerchandising event handler that captures the following information:

- Whether the user is anonymous or registered
- Party ID for a registered user
- Unique Cookie ID for an anonymous user
- Item ID

Oracle Marketing Online's eMerchandising module uses this information to enhance personalization of the customer experience.

Integrating Oracle iStore 11*i* with Oracle Shipping Execution

This chapter describes the integration of Oracle iStore 11*i* with Oracle Shipping Execution. Topics include:

- [Overview of Oracle Shipping Execution](#)
- [Setting Up Oracle Shipping Execution](#)

15.1 Overview of Oracle Shipping Execution

Oracle Shipping Execution allows you to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing.

15.2 Setting Up Oracle Shipping Execution

The Oracle Shipping Execution module must be in place to enable post-order tracking and shipping detail views in Oracle iStore 11*i*. At a minimum, you must perform the following tasks when setting up Oracle Shipping Execution:

- Define pick slip grouping rules.
- Define release sequence rules.
- Define shipping parameters.
- Define freight carriers.
- Define carrier-shipping method relationships.

See *Oracle Shipping Execution User's Guide* for more information.

Note: Set up shipping methods in Oracle Inventory, not Oracle Shipping.

Integrating Oracle iStore 11i with Oracle Web Cache

This chapter describes the integration of Oracle iStore 11*i* with Oracle Web Cache. Topics include:

- [Overview of Oracle Web Cache](#)
- [Oracle iStore 11i Functionality with Oracle Web Cache](#)
- [Setting Up Oracle Web Cache](#)

16.1 Overview of Oracle Web Cache

Oracle Web Cache accelerates Oracle iStore 11i's non-transactional content, including static pages and images, catalog pages, and search results. By compressing and caching dynamically generated content, Oracle Web Cache reduces the load on the other tiers in the architecture and shortens the amount of time required to serve cached content. Once a page is loaded into the cache, other requests for the same page are served from the cache memory instead of the application server. Through the inclusion of a set of Oracle Web Cache-specific tags in the HTML, Oracle Web Cache is also capable of caching content with some personalization. Additionally, the cache server can load balance requests across multiple HTTP servers.

Oracle Web Cache is compatible with Oracle HTTP Server or any other HTTP-compliant application Web server. Possible scenarios for deployment of Oracle Web Cache include the following:

- Deploy Oracle Web Cache on the same computer as the application Web server or on a separate computer.
- Use Oracle Web Cache as a load balancer or in a Failover pair.
- Install Oracle Web Cache inside or outside the firewall.

16.2 Oracle iStore 11i Functionality with Oracle Web Cache

You can integrate Oracle Web Cache 2.0.0 with the Oracle iStore 11i Customer UI. You must deploy Oracle Web Cache in the same domain as the application Web servers, because Oracle iStore 11i session cookies are created by application servers and are only visible to other servers within the same domain. However, the subdomain can be different.

You can set up Oracle Web Cache to cache and serve catalog JSPs(ibeCCt*.jsp), search JSPs (ibeCSr*.jsp, ibeSQtdItemSrch.jsp, ibeSQtpSrch.jsp, and ibeSQtpSrpSrchRslts.jsp), and other pages such as style sheet files, static HTML pages, GIF and JPG/JPEG image files, JavaScript (*.js) files, and jtfdownload.jsp.

See *Oracle9iAS Web Cache Administration and Deployment Guide, Release 2.0.0* for more information about Oracle Web Cache deployment.

16.3 Setting Up Oracle Web Cache

Set up Oracle Web Cache to cache and serve Oracle iStore 11i Customer UI pages, using the following procedures.

Note: The following procedures assume that you want to cache search JSPs. However, since search keywords can vary greatly and search results can be numerous, you may not want to cache search results. In this case, do not complete these procedures for the following JSPs: `ibeCSr*.jsp`, `ibeSQtdItemSrch.jsp`, `ibeSQtpSrch.jsp`, and `ibeSQtpSrpSrchRslts.jsp`.

Prerequisites

Your Oracle iStore 11i implementation must meet the following requirements for integration with Oracle Web Cache:

- Your stores must not allow Express Checkout. Set the profile option IBE: Use Express Checkout to **No**.
- Your stores must use the specialty store price lists. Set the profile option IBE: Use Price List associated with Specialty Store to **Yes**.
- Set the profile option IBE: Use Web Cache Feature to **Yes**. This enables Oracle iStore 11i to create the cookies that you will set up Oracle Web Cache to use for session tracking.

Steps

1. [Perform Initial Setup for Oracle Web Cache.](#)
2. [Create a Rule for Multiple Documents with Same Selector by Cookies.](#)
3. [Create Session/Personalized Attribute Definitions.](#)
4. [Create Session/Personalized Attribute Related Caching Rules.](#)
5. [Create Cacheability Rules.](#)
6. [Create Expiration Rules.](#)
7. [Create a Selector Association for the Multiple Documents Rule.](#)
8. [Create Selector Associations for Sessions and Personalized Attributes.](#)
9. [Set Up Simple Personalization.](#)

10. [Set Up HTTP Error Caching.](#)

11. [Set Up Test Environment.](#)

16.3.1 Perform Initial Setup for Oracle Web Cache

Check your deployment requirements. Make sure the following Oracle Web Cache setups are correct:

- Administration Port and Protocol
- Invalidation/Statistics Port and Protocol
- Security
- Resource Limits
- Process Identity
- Apology Pages
- Application Web Servers
- Oracle Web Cache Listen Ports
- Access Logs

See *Oracle9iAS Web Cache Administration and Deployment Guide, Release 2.0.0* for more information.

16.3.2 Create a Rule for Multiple Documents with Same Selector by Cookies

You can set up Oracle Web Cache to use the Oracle iStore 11i cookie "CombinedCookie" to identify multiple versions of the same catalog page based on the cookie value and cache the versions separately. The cookie "CombinedCookie" combines minisite ID (minisite_id), responsibility ID (resp_id), language (language_code), and currency (currency_code).

Create a rule for multiple documents with the same selector by the cookie "CombinedCookie." You will later create a selector association between this rule and the catalog JSPs, as described in [Section 16.3.7, "Create a Selector Association for the Multiple Documents Rule"](#).

Steps

1. In Oracle Web Cache Manager, choose **Multiple Documents with Same Selector by Cookies**, under Administering Web Sites > Cacheability Rules.

2. Click **Create** or **Add**.

The Edit/Create Multiple Documents with the Same Selector by Cookies Rule window opens.

3. Create the cookie selector for Oracle iStore 11i catalog pages with the following parameters, and click **Apply Changes** when finished:
 - Cookie Name = CombinedCookie
 - Cache without Cookie = NO

16.3.3 Create Session/Personalized Attribute Definitions

Session tracking does not alter the actual content of a page. Therefore, session definitions enable Oracle Web Cache to share the same caches with multiple sessions by substituting one user's session information with another's based on the session information in the session cookies or, if cookies are disabled, the corresponding embedded URL parameters. Oracle Web Cache redirects any HTTP request that does not include session cookies to the application servers.

Oracle iStore 11i uses the following session cookies:

- JTT Session Cookie
- JServ Session Cookie
- Database Session Cookie

It also uses the URL parameter "jfn."

The session cookies JTT Session Cookie, JServ Session Cookie, and Database Session Cookie contain information about the JTT session, JServ session, and database session, respectively. The parameter "jfn" contains information about the current responsibility ID, application ID, and security ID, to facilitate opening multiple applications (responsibilities) simultaneously.

You must create the session definitions JTTSession, JServSession, DbSession, and JFNSession so that Oracle Web Cache can track the respective session cookies and URL parameter.

You must also create personalized attribute definitions for the Oracle iStore 11i cookies "zd," "PersonName," "CartTotal," "SignInOutUrl," and "SignInOutImage."

The cookie "zd" indicates that you have signed into your store with a store manager (IBE_ADMINISTRATOR) responsibility. Logging in as a store manager enables you to preview the storefront display of items and sections before they are published to your customers, as described in [Section 7.1.2, "Previewing Products and Sections"](#).

Using the procedure in [Section 16.3.4, "Create Session/Personalized Attribute Related Caching Rules"](#), you will later set up Oracle Web Cache to cache nothing when this cookie exists, to ensure that you are previewing the latest version of the pages.

Oracle Web Cache can use the Oracle iStore 11i cookies listed in the following table to share the same cache with multiple users by substitution of personalized information into the catalog pages' welcome bin.

Table 16–1 Oracle iStore 11i Cookies for Welcome Bin Personalization

Cookie	Function
PersonName	Stores the user's first and last names
CartTotal	Stores the user's shopping cart amount
SignInOutUrl	Stores the sign in and sign out label
SignInOutImage	Stores the sign in and sign out icon

Oracle Web Cache's substitution of personalized information into cached pages is called Simple Personalization. `ibeCacdWelcome.jsp`, the seeded JSP for the welcome bin, includes the Oracle Web Cache tags for Simple Personalization within HTML comments, which are transparent to application servers. You will later enable Simple Personalization as described in [Section 16.3.9, "Set Up Simple Personalization"](#).

Steps

1. In Oracle Web Cache Manager, choose **Session/Personalized Attribute Definition**, under Administering Web Sites > Session Management.
2. Click **Create** or **Add**.
The Create/Edit Session/Personalized Attribute Definition window opens.
3. Create the sessions and personalized attributes listed in the following table, and click **Apply Changes** when finished.

Table 16–2 Oracle Web Cache Session and Personalized Attribute Definitions

Session/Attribute	Cookie Name	URL Parameter
UserNameCookie	PersonName	
CartTotalCookie	CartTotal	

Table 16–2 Oracle Web Cache Session and Personalized Attribute Definitions (Cont.)

Session/Attribute	Cookie Name	URL Parameter
SignInOutUrlCookie	SignInOutUrl	
SignInOutImageCookie	SignInOutImage	
AdminRespCookie	zd	
DbSession	The Database Session Cookie name is <DB_HOST>_<DB_NAME>, where the values for DB_HOST and DB_NAME come from the .dbc file in the directory \$FND_TOP/secure/.	
JFNSession		jfn
JServSession	The JServ Session Cookie name is set through JServ configuration.	
JTTSession	The JTT Session Cookie name is <Database ID>_<JTT Cookie property value>. You can set the property in Oracle Business Center.	

16.3.4 Create Session/Personalized Attribute Related Caching Rules

You must create caching rules for the sessions and personalized attributes that you have defined.

Steps

1. In Oracle Web Cache Manager, choose **Session/Personalized Attribute Related Caching Rules**, under Administering Web Sites > Session Management.

2. Click **Create** or **Add**.

The Add Session/Personalized Attribute Related Caching Rule window opens.

3. Create the caching rules listed in the following table. Click **Apply Changes** when finished.

Table 16–3 Oracle Web Cache Session/Personalized Attribute Caching Rules

Session/Attribute	Cache without Session/Attribute	Cache with Session/Attribute	Can be derived without Session/Attribute
UserNameCookie	No	Yes	No
CartTotalCookie	No	Yes	No
SignInOutUrlCookie	No	Yes	No

Table 16–3 Oracle Web Cache Session/Personalized Attribute Caching Rules (Cont.)

Session/Attribute	Cache without Session/Attribute	Cache with Session/Attribute	Can be derived without Session/Attribute
SignInOutImageCookie	No	Yes	No
AdminRespCookie	Yes	No	No
DbSession	Yes	Yes	No
JFNSession	Yes	Yes	Yes
JServSession	Yes	Yes	No
JTTSession	No	Yes	No

16.3.5 Create Cacheability Rules

Set up Oracle Web Cache to cache all Oracle iStore 11*i* catalog pages, except `ibeCCtpBuyRoute.jsp`, for the HTTP methods GET, GET with query string, and POST with any parameters. The Oracle iStore 11*i* catalog pages are named `ibeCCt*.jsp`.

`ibeCCtpBuyRoute.jsp` is not cacheable because it invokes the real-time shopping cart process and is a route page to the shopping cart display page. Oracle Web Cache can cache all other catalog route pages if you set it up to accept HTTP 302 as a cacheable HTTP response code, as described in [Section 16.3.10, "Set Up HTTP Error Caching"](#).

You can also set up Oracle Web Cache to cache the Oracle iStore 11*i* search pages `ibeCSr*.jsp`, `ibeSQtdItemSrch.jsp`, `ibeSQtpSrch.jsp`, and `ibeSQtpSrpSrchRsIts.jsp` for the HTTP methods GET, GET with query string, and POST with any parameters.

Additionally, you can set up Oracle Web Cache to cache style sheet files, static HTML pages, GIF and JPG/JPEG image files, JavaScript (*.js) files, and `jtfdload.jsp`.

You should enable compression of all JSPs and HTML pages, and disable compression of images. You can enable or disable compression of JavaScript files and style sheets. Style sheets should not be compressed for Netscape browsers.

Steps

1. In Oracle Web Cache Manager, choose **Administering Web Sites > Cacheability Rules**.
2. Select the last default rule and click **Insert Below**.

The Create Cacheability Rule window opens.

3. Create the cacheability rules listed in the following table, and click **Apply Changes** when finished.

Table 16–4 Oracle Web Cache Cacheability Rules

Priority	URL Expression	HTTP Methods	POST Body Expression	Cache/No Cache	Compress
1	\.pdf\$	GET, GET with query string		Don't Cache	Off
2	\.html?\$	GET, GET with query string		Cache	On for all browsers
3	\.jpe?g\$	GET, GET with query string		Cache	Off
4	\.gif\$	GET, GET with query string		Cache	Off
5	\.js\$	GET, GET with query string		Cache	On for all browsers, or off
6	\.css\$	GET, GET with query string		Cache	On for non-Netscape browsers, or off
7	/OA_HTML/ibeCCtpBuyRoute\.jsp.*	N/A		Don't Cache	On for all browsers
8	/OA_HTML/ibeCCt.*\.jsp.*	GET, GET with query string, POST	.*	Cache	On for all browsers
9	/OA_HTML/jtfdload.jsp	GET, GET with query string		Cache	Off
10	/OA_HTML/ibeCSR.*\.jsp.*	GET, GET with query string, POST	.*	Cache	On for all browsers
11	/OA_HTML/ibeSQtdItemSrch\.jsp.*	GET, GET with query string, POST	.*	Cache	On for all browsers
12	/OA_HTML/ibeSQtpSrch\.jsp.*	GET, GET with query string, POST	.*	Cache	On for all browsers
13	/OA_HTML/ibeSQtpSrpSrchRsIts\.jsp.*	GET, GET with query string, POST	.*	Cache	On for all browsers

16.3.6 Create Expiration Rules

When you change catalog content, Oracle Web Cache does not automatically invalidate cached pages. You must define expiration rules based on a time interval or invalidate cached pages manually in Oracle Web Cache Manager. Expiration rules specify when documents expire in the cache, and how long documents can reside in the cache after they expire.

You should set up your expiration rules according to your content management needs. Since Oracle iStore 11*i* JSPs and HTML pages do not include expiration headers, you cannot set up expiration rules for these pages using "As per HTTP Expires header."

Here is an example of some expiration rules that you can define:

- Invalidate all scripts, style sheet files, cached JSPs, and cached HTML pages every two hours after cache entry, then refresh them within two minutes based on the application servers' capacity.
- Invalidate all image files every two days after cache entry, then refresh them within five minutes based on the application servers' capacity.

To set up these sample expiration rules, use the following procedure.

Steps

1. In Oracle Web Cache Manager, choose **Expiration Rules**, under Administering Web Sites > Cacheability Rules.
2. Click **Create** or **Add**.
The Create Expiration Rule window opens.
3. Create the expiration rules and selector associations listed in the following table, and click **Apply Changes** when finished.

Table 16–5 Oracle Web Cache Expiration Rules

Expire	After Expiration	Selector Association
7200 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 120 seconds after expiration.	\.html?\$ \.css\$ \.js\$ /OA_HTML/ibeCCt.*\.jsp.* /OA_HTML/ibeSQtdItemSrch\.jsp.* /OA_HTML/ibeCSr.*\.jsp.* /OA_HTML/ibeSQtpSrch\.jsp.* /OA_HTML/ibeSQtpSrpSrchRslts.jsp.*
172800 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 300 seconds after expiration.	\.jpe?g\$ \.gif\$ /OA_HTML/jtfdload\.jsp.*

16.3.7 Create a Selector Association for the Multiple Documents Rule

Create a selector association to associate catalog JSPs with the rule for multiple documents with the same selector by the Oracle iStore 11i cookie "CombinedCookie."

Steps

1. In Oracle Web Cache Manager, choose **Multiple Documents with Same Selector by Cookies**, under Administering Web Sites > Cacheability Rules.
2. Select the rule for the cookie name "CombinedCookie."
3. Click **Change Selector Association**.
The Change Policy-Selector Association window opens.
4. Create an association between the selector `/OA_HTML/ibeCCt.*\.jsp.*` and the rule. Click **Apply Changes** when finished.

16.3.8 Create Selector Associations for Sessions and Personalized Attributes

You must associate the selectors that are listed in your cacheability rules with the sessions and personalized attributes that you have defined. Apply the session definitions JTTSession, JServSession, DbSession, and JFNSession to all cached JSPs. Do not bind them to other cached files, such as image files and scripts.

Steps

1. In Oracle Web Cache Manager, choose **Session/Personalized Attribute Related Caching Rules**, under Administering Web Sites > Session Management.
2. Select a session or attribute.
3. Click **Change Selector Association**.
The Change Policy-Selector Association window opens.
4. Create the selector associations listed in the following table for each session and attribute. Click **Apply Changes** when finished.

Table 16–6 Oracle Web Cache Session/Personalized Attribute Selector Associations

Session/Attribute	Selector Associations
UserNameCookie	/OA_HTML/ibeCCt.*\jsp.*
CartTotalCookie	/OA_HTML/ibeCCt.*\jsp.*
SignInOutUrlCookie	/OA_HTML/ibeCCt.*\jsp.*
SignInOutImageCookie	/OA_HTML/ibeCCt.*\jsp.*
AdminRespCookie	\.html?\$ \.jpe?g\$ \.gif\$ \.js\$ \.css\$ /OA_HTML/ibeCCt.*\jsp.* /OA_HTML/jtfdload.jsp /OA_HTML/ibeCSr.*\jsp.* /OA_HTML/ibeSQtdItemSrch\jsp.* /OA_HTML/ibeSQtpSrch\jsp.* /OA_HTML/ibeSQtpSrpSrchRslts\jsp.*

Table 16–6 Oracle Web Cache Session/Personalized Attribute Selector Associations

Session/Attribute	Selector Associations
DbSession	/OA_HTML/ibeCct.*\ .jsp.* /OA_HTML/jtfdload.jsp /OA_HTML/ibeCSr.*\ .jsp.* /OA_HTML/ibeSQtdItemSrch \ .jsp.* /OA_HTML/ibeSQtpSrch \ .jsp.* /OA_HTML/ibeSQtpSrpSrchRslts \ .jsp.*
JFNSession	/OA_HTML/ibeCct.*\ .jsp.* /OA_HTML/jtfdload.jsp /OA_HTML/ibeCSr.*\ .jsp.* /OA_HTML/ibeSQtdItemSrch \ .jsp.* /OA_HTML/ibeSQtpSrch \ .jsp.* /OA_HTML/ibeSQtpSrpSrchRslts \ .jsp.*
JServSession	/OA_HTML/ibeCct.*\ .jsp.* /OA_HTML/jtfdload.jsp /OA_HTML/ibeCSr.*\ .jsp.* /OA_HTML/ibeSQtdItemSrch \ .jsp.* /OA_HTML/ibeSQtpSrch \ .jsp.* /OA_HTML/ibeSQtpSrpSrchRslts \ .jsp.*
JTTSession	/OA_HTML/ibeCct.*\ .jsp.* /OA_HTML/jtfdload.jsp /OA_HTML/ibeCSr.*\ .jsp.* /OA_HTML/ibeSQtdItemSrch \ .jsp.* /OA_HTML/ibeSQtpSrch \ .jsp.* /OA_HTML/ibeSQtpSrpSrchRslts \ .jsp.*

16.3.9 Set Up Simple Personalization

Use the following procedure to set up Simple Personalization.

Steps

1. In Oracle Web Cache Manager, choose **Simple Personalization**, under Administering Web Sites > Cacheability Rules.
2. Select Parse HREFs = **YES**.
3. Click **Change Selector Association**.
The Change Policy-Selector Association window opens.
4. Make the selector associations listed in the following table for simple personalization. Click **Apply Changes** when finished.

Table 16–7 Oracle Web Cache Simple Personalization Selector Associations

Selector	Parse HREFs
/OA_HTML/ibeCCt.*\jsp.*	YES
/OA_HTML/ibeSQtdItemSrch\jsp.*	YES
/OA_HTML/ibeCSr.*\jsp.*	YES
/OA_HTML/ibeSQtpSrch\jsp.*	YES
/OA_HTML/ibeSQtpSrpSrchRslts.jsp.*	YES

16.3.10 Set Up HTTP Error Caching

Use the following procedure to set up HTTP error caching.

Steps

1. In Oracle Web Cache Manager, choose **Administering Web Sites > Cacheability Rules**.
2. For each URL Expression listed below, select the corresponding cacheability rule and click **Edit Selected**.
 - /OA_HTML/ibeCCt.*\jsp.*
 - /OA_HTML/ibeCSr.*\jsp.*
 - /OA_HTML/ibeSQtpSrch\jsp.*

The Edit Cacheability Rule window opens.

3. In the HTTP Error Caching row, enter 302 in the Error Codes to Cache field.
4. In the Edit Cacheability Rules window, click **Submit**.
5. Click **Apply Changes** when finished.

16.3.11 Set Up Test Environment

You can validate cacheability rules by monitoring three log files:

- The Oracle Web Cache access log
- The Oracle Web Cache event log
- The application server's access log

Set up the Oracle Web Cache event log in verbose mode using the following procedure.

Steps

1. In Oracle Web Cache Manager, choose **Administering Oracle Web Cache > Event Logging**.
2. Click **Edit** and check **YES** for **Verbose mode**.
3. Apply the change to Oracle Web Cache.

Integrating Oracle iStore 11i with Oracle Workflow

This chapter describes the integration of Oracle iStore 11i with Oracle Workflow. Topics include:

- [Overview of Oracle Workflow](#)
- [Oracle iStore 11i Functionality with Oracle Workflow](#)
- [Setting Up Oracle Workflow](#)

17.1 Overview of Oracle Workflow

Business processes today involve getting many types of information to multiple people according to rules that are constantly changing. Oracle Workflow lets you automate and continuously improve business processes, routing information of any type to people both inside and outside your enterprise according to business rules that you can easily change.

17.2 Oracle iStore 11i Functionality with Oracle Workflow

Oracle iStore 11i Web stores communicate with their users by e-mail notifications. These notifications include information about registration, order confirmation, cart sharing, sales assistance, contract negotiation, and more. Notifications are triggered by events such as a user's registration, a user's request for sales assistance, and placing an order.

Oracle iStore 11i uses Oracle Workflow to send notifications. Oracle iStore 11i is seeded with notification events and messages for the e-mails that are sent when notification events are triggered. A notification event can be triggered by a Web store user (e.g., registration) or by the application itself (e.g., when an update message is scheduled for daily delivery). The messages include attributes that are dynamically replaced with user-specific values, such as the user's name, when an e-mail is sent. Notification events and messages are stored in Oracle Workflow.

You can choose to use only the seeded messages for notifications. You can also create messages using Oracle Workflow Builder if you do not want to use the seeded messages. When you have the messages that you need, you then select messages for notification events based on organization-user type combinations, using the Oracle iStore 11i Merchant UI.

When one of these notification events is triggered, Oracle iStore 11i selects the message for the notification based on the recipient's organization and user type. Oracle Workflow then parses the message, enters dynamic content, and sends the resulting e-mail to the user.

17.3 Setting Up Oracle Workflow

To activate Oracle Workflow integration with Oracle iStore 11*i*, you must set the profile option IBE: Use Workflow Features in iStore to **Yes**. You must also set the profile option IBE: Default Order Admin to Send Workflow Notification. See [Section A.6, "Oracle iStore 11i \(IBE\) Profile Options for the Customer UI"](#) for profile option descriptions.

In Oracle Human Resources, you must specify the sales representatives and contract sales representatives who receive notifications, as described in [Section 5.9.2, "Setting Up Notification Recipients"](#).

Note: Before upgrading Oracle iStore 11*i*, you must back up any necessary customized messages and remove the access locks from the messages and items of the Oracle iStore 11*i*-related Oracle Workflow definition, so that the upgrade can overwrite the Oracle Workflow definition. See [Section 8.12, "Notifications Errors"](#) for details.

17.3.1 Planning Messages

You can choose to use only the seeded messages for Oracle iStore 11*i* notifications. If you want to create additional messages, you must first perform the following tasks to plan the messages:

- Decide the number of organizations that you will have.
- Decide what the content of the default messages, if any, should be.
- Decide exactly what combinations of organizations and user types need messages that are different from the defaults.
- Decide what the content of the non-default messages should be.

17.3.2 Creating Messages

Use Oracle Workflow Builder to create and edit messages for Oracle iStore 11*i* notifications. The Oracle Workflow item type iStore Alerts Workflow (IBEALERT), in the data store file IBENOTIF.wft, contains all Oracle iStore 11*i* notifications and their messages and attributes, except for the notifications Summary Report and Top N Orders Report. The item type iStore Alert Reports (IBEECRRP), in the data store file IBEVWFR.wft, contains the notifications Summary Report and Top N Orders Report.

Note: Do not modify the seeded messages. Changes to the seeded messages will be overwritten when you apply patches. Instead, copy the seeded messages into new messages, then modify the new messages.

Each message's internal name must begin with a prefix that associates it with an Oracle iStore 11i notification event. The following table lists the message prefix for each notification event. See [Section 5.9, "Setting Up Notifications"](#) for descriptions of the notification events.

Table 17-1 Message Internal Name Prefixes for Oracle iStore 11i Notifications

Notification Event	Message Internal Name Prefix
User Registration	ACCTREG (for B2C users) ACCTREGB2B (for B2B users)
Shared Cart	SHARED CART
Order Confirmation - Normal	ORDCONF
Order Confirmation - Next steps for faxed orders	ORDFAX
Orders Not Booked Notification	ORDNOTBOOKED
Sales Assistance Request - To Users	CUSTASSIST
Sales Assistance Request - To Sales Representatives	SALESASSIST
Contract Negotiations Request - To Users	CUSTQUOTE
Contract Negotiations Request - To Sales Representatives	SALESQUOTE
Contract Negotiations Request - Approval	TERMAPPROVED
Contract Negotiations Request - Cancellation	TERMCANCELLED
Contract Negotiations Request - Disapproval	TERMREJECTED
Reports - iStore Historical Summary	SUMM_MSG
Reports - iStore Top Orders	TOPORD_MSG

Oracle Workflow replaces attributes in messages dynamically with user-specific values when it sends a notification. The following table lists the iStore Alerts Workflow attributes.

Table 17–2 Attributes for the Item Type iStore Alerts Workflow

Display Name	Internal Name	Description	Type
First Name	FIRSTNAME	User's first name	Text
Last Name	LASTNAME	User's last name	Text
Login Name	LOGINNAME	User's login name	Text
Password	PASSWORD	User's password	Text
Email Address	EMAILADDRESS	User's e-mail address	Text
Event Type	EVENTTYPE	Notification event type	Text
Send To	SENDTO	Recipient's e-mail address	Text
Quote Id	QUOTEID	Quote ID	Number
Quote Name	QUOTENAME	Quote name	Text
Contract Number	CONTRACTNO	Contract number	Number
Order Detail	ORDERDETAIL	Order detail	Document
Order Header	ORDERHEADER	Order header	Document
Order Footer	ORDERFOOTER	Order footer	Document
Error Message	ERRMSG	Error message	Text
Comments	COMMENTS	User's comments	Text
Order Header ID	ORDERID	Order header ID	Number
Item Key	ITEMKEY	Item key	Text
Quote Number	QUOTENUM	Quote number	Number
Message Name	MESSAGE	Message name	Text
URL	URL	URL (e.g., a shared cart link)	Text
Sharee Number	SHNUM	Cart sharee number	Text

The item type iStore Alert Reports has a different set of attributes, listed in the following table.

Table 17–3 Attributes for the Item Type iStore Alert Reports

Display Name	Internal Name	Description	Type
Report Frequency	FREQUENCY	Report frequency, e.g., DAY, MONTH	Text
Report Scale	SCALE	Report amount scale	Number
Currency Code	CURRENCY	Currency code	Text
Number of Rows	NUMROW	Number of rows	Number
Report Subject	REPORT_SUBJECT	Report subject	Text
Document Identifier	DOCUMENTID	Document identifier	Text
Report Body	REPORT_BODY	Report body	Text
Bin Refresh Date	BIN_DATE	Bin refresh end date	Text

Use the following procedure to create customized Oracle Workflow messages for the Oracle iStore 11i notifications.

Steps

1. Create a new message using Oracle Workflow Builder, and name it with the appropriate prefix for the notification event, as listed in [Table 17–1, "Message Internal Name Prefixes for Oracle iStore 11i Notifications"](#).
2. Copy the message attributes from the seeded message for the notification event to the new message.
3. Modify the message text as necessary.
4. Restart the Java Virtual Machine (JVM) to refresh the cache objects.
5. You can now map this message to its notification by organization and user type. See [Section 5.9, "Setting Up Notifications"](#) for more information.

See *Oracle Workflow Guide* for more information on working with messages.

Profile Options

This chapter describes profile option settings that are required for successful implementation. Topics include:

- [Before You Begin](#)
- [Setting Profile Options](#)
- [Finding Responsibility ID Values](#)
- [Oracle CRM Technology Foundation \(JTT\) Profile Options](#)
- [Oracle iStore 11i \(IBE\) Profile Options for the Merchant UI](#)
- [Oracle iStore 11i \(IBE\) Profile Options for the Customer UI](#)
- [Other Oracle iStore 11i \(IBE\) Profile Options](#)
- [Oracle Order Capture \(ASO\) Profile Options](#)
- [Oracle Order Management \(OM\) Profile Options](#)
- [Multiple Organization \(MO\) Profile Options](#)
- [Oracle Bills of Material \(BOM\) Profile Options](#)
- [Oracle Contracts Core \(OKC\) Profile Options](#)
- [Concurrent Program Manager Profile Options](#)
- [Site-Level Profile Options](#)

A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh <APPS username/>start`.

A.2 Setting Profile Options

Use the following procedure to set any profile option.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Go to **Profile > System**.
The Find System Profile Values window opens.
3. Check the level(s) at which you want to set the profile option. The available levels are listed below:
 - **Site**
 - **Application**—If you select this level, choose the application from the Application LOV for which you want to set the profile option.
 - **Responsibility**—If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.
 - **User**—If you select this level, choose the user from the User LOV for whom you want to set the profile option.
4. In the Profile field, enter the profile name, such as `IBE: Item Validation Organization`, or a wildcard search criterion such as `IBE%`.
5. Click **Find**.
The System Profile Values form opens with the results of your search.
6. Verify or set the profile option(s) at the levels that you selected.

A.3 Finding Responsibility ID Values

You must know the APPLICATION_ID values and RESPONSIBILITY_ID values for store manager and customer responsibilities before you can set the required Oracle CRM Technology Foundation (JTT) profile options for users with these responsibilities.

Note: The APPLICATION_ID value for the seeded IBE_ADMINISTRATOR and IBE_CUSTOMER responsibilities is 671 (for iStore). The RESPONSIBILITY_ID value for IBE_ADMINISTRATOR is 21819. The RESPONSIBILITY_ID value for IBE_CUSTOMER is 22372.

Use the following procedure to find the APPLICATION_ID value and RESPONSIBILITY_ID value of a responsibility.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Security > Responsibility > Define**.
The Responsibilities form opens.
3. Choose **View > Find**. Search for the responsibility, highlight it, and click **OK** in the search window.
The Responsibilities form is populated with the record for the responsibility that you chose.
4. With your cursor in any field of the record, choose **Help > Diagnostics > Examine**.
The Examine Field and Variable Values window opens.
5. In the Examine Field and Variable Values window, choose **APPLICATION_ID** from the Field LOV.
The Value field in the Examine Field and Variable Values window is populated with the value of APPLICATION_ID.
6. In the Examine Field and Variable Values window, choose **RESPONSIBILITY_ID** from the Field LOV.
The Value field in the Examine Field and Variable Values window is populated with the value of RESPONSIBILITY_ID.

A.4 Oracle CRM Technology Foundation (JTT) Profile Options

This section summarizes the Oracle CRM Technology Foundation (JTT) profile options that you need to set when implementing Oracle iStore 11i.

A.4.1 JTT Profile Options for the Merchant UI

Set the profile options in this section at the following levels:

- **Site**
- **Application**—iStore

Table A-1 JTT Profile Options for the Merchant UI

Profile Option Name	Value	Description
JTF_PROFILE_DEFAULT_APPLICATION	671	Default application ID (671=iStore)
JTF_PROFILE_DEFAULT_BLANK_ROWS	3	Number of blank rows on Merchant UI forms (can be set to any integer > 0)
JTF_PROFILE_DEFAULT_CSS	jtfucss.css	Default Oracle CRM Technology Foundation Cascading Style Sheet
JTF_PROFILE_DEFAULT_CURRENCY	USD	Default currency. Enter the currency code in all uppercase letters.
JTF_PROFILE_DEFAULT_NUM_ROWS	10	
JTF_PROFILE_DEFAULT_RESPONSIBILITY (application level only)	21819	Default responsibility ID (21819=IBE_ADMINISTRATOR)

A.4.2 JTT Profile Options for Store Manager User Accounts

Set the profile options in this section at the following levels:

- **User**—Store manager user name

Table A–2 JTT Profile Options for Store Manager Users

Profile Option Name	Value ¹	Description
JTF_PROFILE_DEFAULT_APPLICATION	671	Default application ID (671=iStore)
JTF_PROFILE_DEFAULT_RESPONSIBILITY	RESPONSIBILITY_ID value of the store manager's responsibility	Default responsibility ID (21819=IBE_ADMINISTRATOR)

¹ See [Section A.3, "Finding Responsibility ID Values"](#) if you need to find the APPLICATION_ID and RESPONSIBILITY_ID values for a responsibility.

A.4.3 JTT Profile Options for the Guest User Account

Set the profile options in this section at the following levels:

- **User**—The guest user name

Table A–3 JTT Profile Options for the Guest User

Profile Option Name	Value ¹	Description
JTF_PROFILE_DEFAULT_APPLICATION	APPLICATION_ID value of the guest user's responsibility	Default application ID (671=iStore)
JTF_PROFILE_DEFAULT_CURRENCY	Currency code for the guest user's default currency, e.g., USD for U.S. dollars	Default currency
JTF_PROFILE_DEFAULT_RESPONSIBILITY	RESPONSIBILITY_ID value of the guest user's responsibility	Default responsibility ID (22372=IBE_CUSTOMER)

¹ See [Section A.3, "Finding Responsibility ID Values"](#) if you need to find the APPLICATION_ID and RESPONSIBILITY_ID values for a responsibility.

A.5 Oracle iStore 11i (IBE) Profile Options for the Merchant UI

There are IBE profile options for Merchant UI setup and for Storefront Reports, which are viewed in the Merchant UI.

A.5.1 IBE Profile Options for Merchant UI Setup

Set the profile options in this section at the following levels:

- **Application**—iStore

You can also set these profile options at the following levels if the descriptions state that you can:

- **Site**
- **Responsibility**—IBE_ADMINISTRATOR or another store manager responsibility
- **User**—Store manager user name

The following table describes the IBE profile options for Merchant UI setup.

Table A-4 IBE Profile Options for Merchant UI Setup

Profile Option Name	Mandatory	Description
IBE: Category Set	Yes	This profile option is used when searching for products in the Merchant UI based on category. (The value "Inv. Items" is for the Vision database.) See Table A-9 for profile option description relevant to Customer UI.
IBE: Item Validation Organization	Yes	This profile option specifies the inventory organization when adding products to the catalog. It allows only the items belonging to this inventory organization to be added to the catalog hierarchy. For vision demo, master organization is Vision Operations (204). Recommended Value: Master Inventory Organization

Table A-4 IBE Profile Options for Merchant UI Setup (Cont.)

Profile Option Name	Mandatory	Description
IBE: Item Validation Organization (Responsibility or user level)	No	<p>This is the same profile option as the IBE: Item Validation Organization profile option that is set at application level. However, you may wish to set it at responsibility level if you have a multiple operating unit environment and want different store managers to be able to manage items from only certain Inventory Organizations.</p> <p>To set this profile option at responsibility level, first set up store manager responsibilities in addition to the IBE_ADMINISTRATOR responsibility. Next, set up Inventory Organizations that are subsets of the master Inventory Organization. Then for each store manager responsibility, set the profile option at responsibility level to the Inventory Organization that you want the responsibility to manage. Finally, create store manager user accounts with these responsibilities.</p> <p>You can also set the profile option at user level for individual users.</p>
IBE: Number of Days for New Item Definition	No	<p>An item created within the number of days specified in this profile option is considered a new item in the Merchant UI. If this profile option is not set, only items created on the current day are considered new items.</p>

Table A-4 IBE Profile Options for Merchant UI Setup (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use Database for Media Storage (Site level)	No	This profile option specifies whether you store media source files in the database or the file system. Yes enables media storage in the database, allowing you to search the database for media source files when setting up multimedia objects. No disables media storage in the database, so that you store media source files in the file system and enter the directory paths for the files when setting up multimedia objects. The profile option defaults to value No if not set. If this profile option is set to Yes , use a media cache system to enhance performance, so that only the first access to any medium goes to the database.

A.5.2 IBE Profile Options for Storefront Reports

Set the profile options in this section at the following levels:

- **Application**—iStore

The following table describes the IBE profile options for Storefront Reports.

Table A-5 IBE Profile Options for Storefront Reports

Profile Option Name	Mandatory	Description
IBE: Currency Code	Yes	This profile option specifies the currency code used in Storefront Reports.
IBE: Enable Force Refresh	No	This profile option specifies whether to populate the Storefront Reports fact tables with data even if they already hold data for exactly the same time period that you have specified in the parameters of the iStore Reports Complete Data Refresh Set concurrent programs. Yes forces this data refresh. No prevents this data refresh; this option refreshes only the unpopulated data. The profile option defaults to value Yes if not set.

Table A-5 IBE Profile Options for Storefront Reports (Cont.)

Profile Option Name	Mandatory	Description
IBE: Enable Parallel Data Extraction for Reporting	No	This profile option specifies whether parallelism is enabled when running the data refresh concurrent programs for Storefront Reports. Yes enables parallelism. No disables parallelism. The profile option defaults to value No if not set.
IBE: GL Conversion Type	Yes	This profile option specifies the Oracle General Ledger currency conversion type for Storefront Reports. The Oracle General Ledger currency conversion type provides the information necessary to convert transaction amount data from the original currencies to the currency required by Storefront Reports, which is specified in the profile option IBE: Currency Code. The setting for IBE: GL Conversion Type must match the conversion type chosen when you set up the daily currency conversion rate in Oracle General Ledger for the required Storefront Reports period.
IBE: GL Period Set Name	Yes	This profile option specifies the Oracle General Ledger period set used by the Storefront Reports. Set the profile option to the calendar that you want the Storefront Reports to use. This calendar must use the Oracle General Ledger standard period types Month, Quarter, and Year. The Oracle General Ledger time periods in the calendar must be non-adjusting periods.
IBE: iStore Materialized Views Usage	No	This profile option controls whether the database engine reroutes Storefront Report queries against materialized views when the queries are run against the fact tables. The database engine reroutes the queries if the profile option is set to Yes . The profile option defaults to value Yes if not set.

Table A-5 IBE Profile Options for Storefront Reports (Cont.)

Profile Option Name	Mandatory	Description
IBE: Quarter Begin Data	No	<p>This profile option specifies whether the iStore Reports Complete Data Refresh Set can default the Begin Date parameter to the start date of the current quarter if the user does not define a value, or if the user-defined value is later than the quarter start date. Yes enables defaulting to the quarter start date. No disables defaulting. The profile option defaults to value Yes if not set.</p> <p>The value of the profile option is irrelevant if the profile option IBE: YTD Data Availability in Bins is set to Yes.</p>
IBE: Truncate Records	No	<p>This profile option specifies whether records are deleted or truncated in the Storefront Reports fact tables. Yes truncates the records, resulting in faster performance. The profile option defaults to value Yes if not set.</p>
IBE: Use Default Bin Preference	No	<p>This profile option specifies whether default Data Out Bin preferences apply for users who have not set up their bin preferences in the Reports tab. The default preferences place only the Store Order Summary bin on the left side of the first Data Out Bins page. Yes configures Data Out Bins according to default bin preferences until the users configure their preferences. No makes default bin preferences unavailable. The profile option defaults to value No if not set.</p>

Table A-5 IBE Profile Options for Storefront Reports (Cont.)

Profile Option Name	Mandatory	Description
IBE: YTD Data Availability in Bins	No	<p>This profile option specifies whether the iStore Reports Complete Data Refresh Set can default the Begin Date parameter to the start date of the current year if the user does not define a value, or if the user-defined value is later than the year start date. Yes enables defaulting to the year start date. No disables defaulting. The profile option defaults to value Yes if not set.</p> <p>If the profile option is set to Yes, the value of the profile option IBE: Quarter Begin Data is irrelevant.</p>

A.6 Oracle iStore 11i (IBE) Profile Options for the Customer UI

There are IBE profile options for the following aspects of the Customer UI:

- Catalog
- Template Manager
- Shopping Cart
- Express Checkout
- Postsales
- Notifications
- Caching
- Functionality

A.6.1 IBE Profile Options for the Catalog

Set the profile options in this section at the following levels:

- **Application**—iStore

The following tables describe the IBE profile options for these aspects of the catalog:

- Sections
- Items

- Search

Table A–6 IBE Profile Options for Catalog—Sections

Profile Option Name	Mandatory	Description
IBE: Items Per Section for Display	No	This profile option specifies the maximum number of items to display per section. If the profile option is not set, all items in a section will be displayed.
IBE: Lines Per Section for Multiple Section Display	No	This profile option specifies the number of items displayed per section when the application displays multiple sections on a catalog page. If no value is specified, the value in the profile option IBE: Items Per Page for Display is used.
IBE: Number of Menu Subtabs	No	This profile option specifies the number of menu subtabs. It defaults to value 5 if not set.
IBE: Number of Menu Tabs	No	This profile option specifies the number of menu tabs. It defaults to value 5 if not set.
IBE: Sections Per Page for display	No	This profile option specifies the total number of sections to be displayed per catalog page. If the number of subsections that belong to the catalog page's current section exceeds the number set in this profile option, they are paginated so that the user can navigate to subsequent catalog pages for this section that display the additional subsections. If no value is specified, the number of sections per page is not limited.
IBE: Show Change Store Link	No	This profile option specifies whether the link to the specialty stores login page appear in the global bin. The value of this profile option is relevant only if the profile options IBE: Use Global Bin and IBE: Use Specialty Stores Page are set to Yes . Set this profile option to Yes if you want the global bin to allow the user to change store, language, or currency. Set the profile option to No if you want the global bin to allow the user to change only language and currency. The profile option defaults to value Yes if not set.

Table A-6 IBE Profile Options for Catalog—Sections (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use Catalog exclusions	No	This profile option specifies whether to use catalog exclusions in the specialty store. If exclusions are never specified in any specialty store, then set to No to improve performance.
IBE: Use Global Bin	No	<p>This profile option specifies whether the global bin is displayed on section pages in its default location. The global bin has a link to the specialty stores page, where users can change to another specialty store. It also allows users to select their preferred language and currency from pull-down menus. The profile defaults to Yes if not set.</p> <p>If the profile option IBE: Use Specialty Stores Page is set to No, the global bin contains only the currency pull-down menu.</p> <p>If the profile option IBE: Use Specialty Stores Page is set to Yes and the profile option IBE: Show Change Stores Link is set to No, the global bin contains only the language and currency pull-down menus.</p>
IBE: Use Logical Media for Menu images	No	<p>This profile option specifies whether to use logical media for the menu images. Set the profile option to Yes to use logical media for the menu images if you customize the images, so that the application uses DisplayManager to retrieve the images. Set this profile option to No to disable logical media for the menu images and use the default menu images. The profile option defaults to value No if not set.</p> <p>Note: STORE_LOGO is always retrieved by DisplayManager.</p>
IBE: Use Section Bin	No	This profile option specifies whether the section browse bin is displayed on section pages in its default location. The profile option defaults to value Yes and displays the section bin if not set.

Table A-6 IBE Profile Options for Catalog—Sections (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use Section Path	No	This profile option specifies whether the section path is displayed on section and item pages in its default location. The profile option defaults to value Yes and displays the section path if not set.
IBE: Use Specialty Stores Page	No	This profile option specifies whether the user must return to the specialty stores page to switch stores. If the profile option is set to Yes , the user must return to the specialty stores page. A link to the page appears in the global bin. (The profile options IBE: Use Global Bin and IBE: Show Change Stores Link must be set to Yes .) If the profile option is set to No , a store pull-down menu and supported language links appear in the stores' home page menu bars if there are multiple specialty stores or supported languages. The pull-down menu displays all stores. The global bin, if activated, displays only a currency pull-down menu. The profile option defaults to value Yes if not set. Note: If you have set up access control for your specialty stores, then set the profile option to Yes .
IBE: Use Welcome Bin	No	This profile option enables/disables the welcome bin on section pages in its default location. If no value is specified, the welcome bin is enabled.

Table A-7 IBE Profile Options for Catalog—Items

Profile Option Name	Mandatory	Description
IBE: Items Per Page for Display	No	This profile option specifies the number of items to display on a leaf section page. If the number of items in the section exceeds this value, the page displays a Next link. This profile option defaults to value 20 if not set.

Table A-7 IBE Profile Options for Catalog—Items (Cont.)

Profile Option Name	Mandatory	Description
IBE: Pricing Event — Before Shopping Cart	Yes	This profile option specifies the user-defined pricing event (defined in Pricing) for the catalog stage. Recommended value: Enter Order Line
IBE: Retrieve All Units of Measure for an Item	No	If this profile option is set to Yes , the application retrieves all units of measure with prices for an item and displays them in a UOM pull-down menu in the Web store catalog. If this profile option is set to No , the application retrieves only the primary unit of measure and its prices. The application retrieves all units of measure if this profile option is not set.
IBE: Retrieve Price When Displaying Items	No	If the profile option is set to Yes , the application retrieves prices for an item's primary UOM based on the specialty store's price list when loading the item. Otherwise, prices will be retrieved when the price APIs are called. Recommended values: Yes if retrieving prices only for the primary UOM. Otherwise, No .
IBE: Use Add Item Bin	No	This profile option specifies whether the Add Item bin is displayed on item pages in its default location. If no value is specified, the Add Item bin is enabled.

Table A-8 IBE Profile Options for Catalog—Search

Profile Option Name	Mandatory	Description
IBE: Enable Fuzzy Search	No	If the profile option is set to Yes , the application allows users to perform fuzzy product searches, so that they do not have to type in the exact spelling of their search criteria to retrieve results that match these criteria. The profile option defaults to value No if not set.

Table A-8 IBE Profile Options for Catalog—Search (Cont.)

Profile Option Name	Mandatory	Description
IBE: Search Lines Per Page	No	This profile option specifies the number of search results displayed on a single search result page. It defaults to value 20 if not set.
IBE: Thesaurus File Name	No	This profile option specifies the prefix for the thesaurus names of the synonym files that you load for the Oracle iStore 11i product synonym search. In the thesaurus names, you must use this prefix followed by <code>_language_short_code</code> . The profile option thus standardizes the thesaurus names. If the profile option is not set, it defaults to <code>IBETHESAURUS</code> . Note: If you change this profile option after you have loaded synonym files, those synonym files are no longer accessible, and you must load the synonym files with their new thesaurus names.
IBE: Use Category Search	No	If this profile option is set to Yes , it activates Category search so that the home page pull-down menu shows categories with publishable items. If this profile option is set to No , it activates Section search so that the home page pull-down menu shows top level sections for the minisite where the customer is browsing. Null value removes the home page pull-down menu so that search is only enabled in all products.
IBE: Use Synonym Search	No	This profile option specifies whether the product search retrieves product names that are synonyms of the users' search keywords. Yes enables the synonym search after you have loaded a thesaurus. No disables the synonym search. The profile option defaults to value No if not set.

A.6.2 IBE Profile Options for the Template Manager

Set the profile options in this section at the following levels:

- **Application**—iStore

The following table describes the IBE profile options for the Template Manager.

Table A-9 IBE Profile Options for Template Manager

Profile Option Name	Mandatory	Description
IBE: Category Set	Yes	This profile option specifies the category set for determining the display category for an item. If an item belongs to a category in this category set, the Customer UI will use the display style mapping for the category if an association is not found at the item level. (The value "Inv. Items" is for the Vision database.)

A.6.3 IBE Profile Options for the Shopping Cart

Set the profile options in this section at the following levels:

- **Application**—iStore

You can also set these profile options at the following levels if the descriptions state that you can:

- **Responsibility**—IBE_CUSTOMER or another Oracle iStore 11i customer user responsibility
- **User**—Customer user name

The following table describes the IBE profile options for the Shopping Cart.

Table A-10 IBE Profile Options for Shopping Cart

Profile Option Name	Mandatory	Description
IBE: Authorize Payment Offline during normal Checkout	No	This profile option specifies if payment authorization offline before checkout is allowed. Yes enables offline authorization. No allows only online authorization. The profile option defaults to value Yes if not set.

Table A-10 IBE Profile Options for Shopping Cart (Cont.)

Profile Option Name	Mandatory	Description
IBE: Create Order in Entered State, if it has errors while booking	No	This profile option specifies if the order should be created in the Entered state even if there are errors while booking it. The profile option defaults to value No if not set.
IBE: Create Standard Contract	No	This profile option specifies whether a contract is created when a customer agrees to standard terms and conditions. If the profile option is set to Yes , a contract is created in the signed state when the customer places the order. If the profile option is set to No , no contract is created. The profile option defaults to value Yes if not set. You need to set this profile option only if the profile option ASO: Enable Use Contracts is set to Yes .
IBE: Finalize Order On Error in Authorize Payment	No	If there is an error in the conversion of a quote to an order of Booked status, this profile option specifies whether the order is finalized. If the profile option is set to Yes , the order is submitted in Entered status. The profile option defaults to value No if not set.
IBE: Merge Shopping Cart Lines	No	This profile option specifies whether to merge item lines in the shopping cart if the same item is added to the cart more than once. The profile option defaults to value No if not set.
IBE: Preferred Shipping Method (Responsibility or user level)	No	This profile option specifies preferred shipping method.
IBE: Pricing Event for Shopping Cart	Yes	Set this profile option to Batch Processing . This profile option specifies the pricing event for processing the shopping cart price in Oracle Pricing. You must set the profile option to Batch Processing to ensure that the price lists, modifiers, discounts, promotion codes, and surcharges are applied correctly at both header and line level.

Table A-10 IBE Profile Options for Shopping Cart (Cont.)

Profile Option Name	Mandatory	Description
IBE: Recalculate Price in Order Management	No	If the profile option is set to No , the quote-related prices are passed on to Oracle Order Management unchanged. If the profile option is set to Yes , the quote-related prices can be changed in the order because Oracle Order Management is allowed to recalculate the prices for the quote. The profile option defaults to value No if not set.
IBE: Request Type to get a Price	Yes	Select the transaction application (e.g., Oracle Order Management) that calls the Pricing engine.
IBE: Shopping Cart Expiration Duration	No	This profile option specifies the number of days that shopping carts are maintained and available to the merchant and customer. The profile option defaults to value 0 if not set.
IBE: Shopping Cart Price based on Owner	No	If the profile option is set to Yes , the shopping cart price will be based on the shopping cart owner if retrieved by someone sharing the cart. Otherwise, the cart price will be recalculated based on modifications to the cart made by the person sharing the cart. The profile option defaults to value No if not set.
IBE: Use fax credit card as a Payment Option	No	This profile option specifies whether users can choose to fax their credit card as a payment method in the billing information page during checkout. The profile option defaults to value Yes if not set.
IBE: Use invoice as a Payment Option	No	This profile option specifies whether users can choose invoice as a payment method in the billing information page during checkout. The profile option defaults to value Yes if not set.
IBE: Use Line Level Shipping	No	This profile option specifies whether users can enter line level shipping information in the shipping information page during checkout. The profile option defaults to value Yes if not set.

Table A-10 IBE Profile Options for Shopping Cart (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use Price list associated with Specialty Store	No	If the profile option is set to Yes , Oracle iStore 11i uses the price lists that are specified in the Merchant UI for walk-in, registered, and B2B users in the specialty stores. If the profile option is set to No , then for registered and B2B users, Oracle iStore 11i passes a null price list with the party ID and account ID to Oracle Pricing. Oracle Pricing then determines a price list for which the user qualifies. When the profile option is set to No , Oracle iStore 11i still uses the price lists that are specified in the Merchant UI for walk-in users in the specialty stores. If the profile option is not set, it defaults to value Yes .
IBE: Use Shipping Instructions	No	This profile option specifies whether a user can enter shipping instructions on the shipping information page or the order review page during checkout. The profile option defaults to value Yes if not set.

A.6.4 IBE Profile Options for Express Checkout

Set the profile options in this section at the following levels:

- **Application**—iStore

The following table describes the IBE profile options for Express Checkout.

Table A-11 IBE Profile Options for Express Checkout

Profile Option Name	Mandatory	Description
IBE: Express Checkout Consolidation Time Interval	No	This profile option specifies the time interval, in minutes, in which the Express Checkout shopping cart will be converted in an order by the concurrent batch job. The profile option defaults to value 60 if not set.

A.6.5 IBE Profile Options for Postsales

Set the profile options in this section at the following levels:

- **Application**—iStore

The following table describes the IBE profile options for Postsales.

Table A–12 IBE Profile Options for Postsales

Profile Option Name	Mandatory	Description
IBE: Enable Invoices in Order Tracker	No	This profile option specifies whether the Invoices link is displayed in the third level menu of Order Tracker/My Orders. The profile defaults to value Yes if not set and displays the link.
IBE: Enable Payments in Order Tracker	No	This profile option specifies whether the Payments link is displayed in the third level menu of Order Tracker/My Orders. The profile defaults to value Yes if not set and displays the link.
IBE: Number of Invoice/Order Lines displayed	No	This profile option specifies the number of invoice and order lines displayed in Order Tracker/My Orders. The profile option defaults to value 10 if not set.
IBE: Use Auth Permissions in Order Tracker	No	This profile option specifies if permission checking is enforced for users to view only the orders placed by themselves or all of their organization's orders. If the profile option is set to Yes , Order Tracker checks that the user has the permissions IBE_VIEW_INVOICE, IBE_VIEW_ORDER, and IBE_VIEW_PAYMENT before allowing the user to view invoices, orders, and payments, respectively, in My Orders. The profile option defaults to value No if not set.

A.6.6 IBE Profile Options for Notifications

Set the profile options in this section at the following levels:

- **Application**—iStore

The following table describes the IBE profile options for notifications.

Table A-13 IBE Profile Options for Notifications

Profile Option Name	Mandatory	Description
IBE: Default Order Admin to Send Workflow Notification	No	This profile option specifies the default order administrator's Oracle Workflow user name. An e-mail is sent to this order administrator upon errors in submitting orders. If the profile option is set, the profile option IBE: Use Workflow Features in iStore must also be set to Yes .
IBE: Email Address to send Diagnostic Messages	No	This profile option specifies the e-mail address that receives diagnostic messages when there is an Oracle iStore 11i application error in the Customer UI, such as an exception. Oracle iStore 11i sends the exception message and application context to this e-mail address. The recipient can use the information to troubleshoot Oracle iStore 11i.
IBE: Notification User Role	No	This profile option specifies the user responsibility for setting notifications. Recommended value: System Administrator

A.6.7 IBE Profile Options for Caching

Set the profile options in this section at the following levels:

- **Application**—iStore

You can also set these profile options at the following levels if the descriptions state that you can:

- **Site**

The following table describes the IBE profile options for caching.

Table A-14 IBE Profile Options for Caching

Profile Option Name	Mandatory	Description
IBE: Cache On (Site level only)	No	<p>This profile option specifies whether to enable the store cache for sections and items. If the profile option is set to Yes, the store cache is enabled. If the profile option is set to No, sections and items are not cached. The profile defaults to value No if not set.</p> <p>If you are using responsibility-based Oracle Pricing modifiers to provide product pricing for walk-in users based on responsibility ID, you cannot use the store cache because it caches prices for walk-in users according to price list ID. In this case, set the profile option to No.</p> <p>Recommended value: Yes</p>
IBE: Enable Preloading of Cache for Catalog	No	<p>If this profile option is set to Yes, the application preloads the catalog when the first user logs in, depending on the size specified in the cache size profile options. At the expense of the first hit, the subsequent catalog search and navigation become faster. If the profile option is not set, the application does not preload the section and item cache.</p>
IBE: Item Cache Size	No	<p>This profile option specifies the maximum number of items to cache on the middle tier. The profile option defaults to value 200 if not set, and if the cache is on.</p>
IBE: No of Results in Search	No	<p>This profile option specifies the number of hits that a store product search returns. The product search retrieves and sorts the first n items in Oracle Inventory, where n is the profile option value. It does not sort all items in Oracle Inventory before retrieving the search results. Therefore, the number of hits that you specify in the profile option should be high enough to provide search results that reflect the actual content of your inventory. The number should also be low enough for efficient performance. The profile option defaults to value 200 if not set.</p>

Table A-14 IBE Profile Options for Caching (Cont.)

Profile Option Name	Mandatory	Description
IBE: Order Tracker Object Cache	No	This profile option specifies whether Order Tracker Java objects are cached in the middle tier. Recommended value: Yes
IBE: Port Number to use for multicast messages	No	This profile option specifies the port number to use for multicast messages. The profile option defaults to port 50000 if not set.
IBE: Preload Specialty Store Cache	No	This profile option specifies whether the specialty store cache is preloaded to the middle tier. Yes preloads the cache. The profile option defaults to value No if not set.
IBE: Section Cache Size	No	This profile option specifies the maximum number of sections to cache on the middle tier. The profile option defaults to value 100 if not set, and if the cache is on.

A.6.8 IBE Profile Options for Functionality

Set the profile options in this section at the following levels:

- **Application**—iStore

You can also set these profile options at the following levels if the descriptions state that you can:

- **User**—Customer user name

The following table describes the IBE profile options for functionality.

Table A-15 IBE Profile Options for Functionality

Profile Option Name	Mandatory	Description
IBE: Enable Debug (User level only)	No	This profile option specifies whether user-specific logging is available for the JSP/Java and PL/SQL layers. Yes activates user-specific logging. The profile option defaults to value No if not set.
IBE: Use AOL Menu	No	This profile option specifies whether to use AOL's menu framework.

Table A–15 IBE Profile Options for Functionality (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use B2B Features	No	This profile option specifies whether B2B features such as business user registration, Profile user administration, and Profile role management are available to the customer. The profile option defaults to value Yes if not set. See <i>Oracle iStore Concepts and Procedures</i> for a detailed review of Oracle iStore 11i B2B features.
IBE: Use Business to Customer Features	No	This profile option specifies whether B2C registration is available in your stores. The profile option defaults to value Yes if not set.
IBE: Use Business User Auto Approval	No	This profile option specifies whether approval of B2B users is automatic. Yes enables automatic approval of B2B users. See <i>Oracle iStore Concepts and Procedures</i> for details. No disables automatic approval of B2B users, so that each B2B user registration request is queued for the system administrator's approval. The profile option defaults to value No if not set.
IBE: Use CABO UI	No	Set this profile option to Yes . The profile option defaults to value Yes if not set.
IBE: Use Call me Back	No	This profile option specifies whether the callback feature is enabled. With the callback feature, users can click a link in the welcome bin to request that a merchant representative call them back. The callback feature requires integration of Oracle iStore 11i with Oracle iSupport and Oracle Telephony Manager. The profile option defaults to value No if not set.
IBE: Use Direct Item Entry	No	This profile option specifies whether customer-to-merchant part number mapping is available. The profile option defaults to value Yes if not set.
IBE: Use Express Checkout	No	This profile option specifies whether Express Checkout is enabled. The profile option defaults to value Yes if not set.

Table A–15 IBE Profile Options for Functionality (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use Sales Assistance Feature	No	<p>This profile option specifies whether Sales Assistance is enabled. The profile option defaults to value Yes if not set.</p> <p>See Section 3.1.5, "Setting Up Sales Assistance Prompts in AOL" for more information about the Sales Assistance feature.</p>
IBE: Use Sensitive Pages	No	<p>A sensitive page is a page that displays personal user-specific information. In Oracle iStore 11i, the checkout and account pages are sensitive.</p> <p>The checkout pages are the pages that appear from the point when users click Checkout, until they place an order. Some of the pages in the checkout flow include billing information, shipping information, and order review.</p> <p>The account pages are the pages where users view and update their passwords, names, phones, emails, addresses, credit cards, and Express Checkout settings. For B2B users, the User Management and Role Management pages are also sensitive.</p> <p>Catalog (sections and products), shopping cart, and My Orders pages are not sensitive.</p> <p>If the profile option is set to Yes, the application reauthenticates a logged-in user before displaying a sensitive page. If the profile option is set to No, reauthentication does not take place. The profile option defaults to value Yes if not set.</p>
IBE: Use Share Cart	No	<p>This profile option specifies whether customers can share shopping carts in Oracle iStore 11i. The profile option defaults to value No if not set.</p>
IBE: Use Shop List	No	<p>This profile option specifies whether shopping list functionality is available to customers. The profile option defaults to value Yes if not set.</p>

Table A–15 IBE Profile Options for Functionality (Cont.)

Profile Option Name	Mandatory	Description
IBE: Use Support	No	This profile option is currently not in use. Set the profile option to No .
IBE: Use Support Cart Level	No	This profile option is currently not in use. Set the profile option to No .
IBE: Use Web Cache Feature	No	This profile option enables Oracle Web Cache integration. If the profile option is set to Yes , Oracle iStore 11i creates the cookies that Oracle Web Cache uses for session tracking. If the profile option is set to No , you cannot integrate Oracle iStore 11i with Oracle Web Cache. The profile option defaults to No if not set.
IBE: Use Web Placements	No	This profile option specifies whether eMerchandising postings from Oracle Marketing Online can display on Oracle iStore 11i Web store pages. Yes enables eMerchandising postings. No disables eMerchandising postings. The profile option defaults to value Yes if not set.
IBE: Use Workflow Features in iStore	No	This profile option specifies whether Oracle Workflow features, such as e-mail notifications to customers regarding registration, orders, and order status requests, are available in your instance. The profile option defaults to value Yes if not set.

A.7 Other Oracle iStore 11i (IBE) Profile Options

The following IBE profile options are related only to Oracle HTML Quoting. See *Oracle HTML Quoting Implementation Guide* for more information.

- IBE: Attachment Document Category
- IBE: Search Operator
- IBE: Use Line Types
- IBE: Use Notes
- IBE: Use Quote Publishing
- IBE: Use Tasks

- IBE: View Custom Quote Line Details

The following IBE profile options are not supported:

- IBE: Add number of rows to direct entry cart
- IBE: Capture Payment for Downloadable Products
- IBE: Cart Level Support Duration
- IBE: Days For Email
- IBE: Default Contract Template Name
- IBE: Default Display Context
- IBE: Default Item Media
- IBE: Default Item Template
- IBE: Default Payment Term
- IBE: Default Pricing Agreement for the User
- IBE: Default Request Terms Change User to Send Workflow Notification
- IBE: Default Sales Assistant to Send Workflow Notification
- IBE: Default Section Media
- IBE: Default Section Template
- IBE: Default Specialty Store
- IBE: Email Promotions
- IBE: Express Checkout Error Behavior
- IBE: iStore Non Secure URL
- IBE: iStore Secure URL
- IBE: Line Level Pricing Event for Shopping Cart
- IBE: Maximum Number of Saved Shopping Carts
- IBE: Maximum Number of Shopping Lists
- IBE: Preferred Support Level for Shopping Cart
- IBE: Reserve Items On Every Express Checkout
- IBE: Search Minimum Prefix Value
- IBE: Section Name for CD Packs Section

- IBE: Shopping Cart Price Frozen Duration
- IBE: Top Number of Items
- IBE: URL Prefix for DataBase Media
- IBE: Use CD Packs
- IBE: Use Contracts
- IBE: Use CSI Number in Order Tracker
- IBE: Use Shopping Lists

A.8 Oracle Order Capture (ASO) Profile Options

Set the profile options in this section at the following levels:

- **Site**
- **Application**—iStore

You can also set these profile options at the following levels if the descriptions state that you can:

- **Responsibility**—IBE_CUSTOMER and any other Oracle iStore 11i customer user responsibility

The following table describes the ASO profile options.

Table A-16 ASO Profile Options

Profile Option Name	Value	Description
ASO: Configurator URL	Oracle Configurator Servlet URL	This profile specifies the URL for the Oracle Configurator Servlet. The URL should be the same as the value of BOM: Configurator URL of UI Manager. If you are using Oracle Configurator for product configurations in Oracle iStore 11i, you must set this profile option.
ASO: Credit Card Authorization (Application level only)	No	If this profile option is set to Yes , payment is authorized at the time the shopping cart is created. Recommended value: No

Table A–16 ASO Profile Options (Cont.)

Profile Option Name	Value	Description
ASO: Default Order State	Entered or Booked	Oracle Order Capture passes Oracle iStore 11i orders to Oracle Order Management with this status. However, if the user chooses to pay by credit card or purchase order and does not enter the credit card number or purchase order number, the order is passed to Oracle Order Management with the status Entered, regardless of the profile option setting.
ASO: Default Order Type (Site, application, and responsibility levels)	Mixed	This profile option determines how the order is to be processed in Oracle Order Management. The order types are set up in Oracle Order Management. The profile option determines what price list and currency code appear by default in the main Oracle Order Capture form.
ASO: Default Salesrep	No Sales Credit	The default sales representative who is allocated the sales credits for booked orders when the user is not entered as a sales representative.
ASO: Enable Use Contracts (Application level only)	Yes/No	Yes activates integration with Oracle Contracts, to enable features such as storefront display of standard terms and conditions from a contract template, requirement of agreement with terms and conditions before checkout, and negotiation of terms and conditions. Before setting this profile option to Yes , you must install Oracle Contracts and set the OKC profile options listed in Table A–20, "OKC Profile Options" . ASO: Enable Use Contracts defaults to value No if not set.
ASO: OM Defaulting	Yes/No	This profile option specifies whether Oracle Order Management defaults values according to its rules for the following attributes of an order when the order is placed: salesrep_id, order_type_id, payment_term_id, fob_code, freight_terms_code, and shipment_priority_code.

Table A–16 ASO Profile Options (Cont.)

Profile Option Name	Value	Description
ASO: Product Organization	Master Inventory Organization	The organization that Oracle Order Capture uses to validate inventory items.
ASO: Quote Conversion Type		Set this profile option to the same value as the Oracle Order Capture application level setting.
ASO: Reservation Level (Site level only)	Null	This profile option specifies the level at which item reservations are performed. Items can be reserved manually, or automatically when the order is placed.
ASO: Validate Salesrep	No	This profile option specifies whether a sales representative must be specified on a quote prior to submitting it as an order.

A.9 Oracle Order Management (OM) Profile Options

Set the profile options in this section at the following levels:

- Site

The following table describes the OM profile options.

Table A–17 OM Profile Options

Profile Option Name	Value	Description
OM: Debug Log Directory	<Directory path>	If you have set the IBE: Debug profile option to Yes for a user, verify or set the profile option OM: Debug Log Directory to a directory that is writable by the database server. Oracle iStore 11i Customer UI user-specific logs for the PL/SQL layer are written in this directory.

A.10 Multiple Organization (MO) Profile Options

Set the profile options in this section at the following levels:

- **Responsibility**—IBE_CUSTOMER and any other Oracle iStore 11*i* customer user responsibility

The following table describes the MO profile options.

Table A-18 MO Profile Options

Profile Option Name	Value	Description
MO: Operating Unit	Operating unit	This profile specifies the operating unit against which the user can place orders. The user can only view and purchase items that are in the Inventory Organization associated with this operating unit.

Setting Up MO Profile Options for Multiple Operating Units

For a multiple operating unit environment, you must create a separate IBE customer responsibility for each operating unit in Oracle Forms. You can use the seeded responsibility IBE_CUSTOMER as one of these responsibilities. Each customer name is assigned at least one such responsibility when the name is approved.

For each of the customer responsibilities, set the profile option MO: Operating Unit to its respective operating unit.

When a customer enters a Web store, Oracle iStore 11*i* notes the customer's responsibility and the operating unit to which it is assigned, then restricts the customer to the items in the Inventory Organization that is associated with the operating unit. Oracle iStore 11*i* accomplishes this by retrieving the Inventory Organization ID for the current user responsibility's operating unit from the OE_SYSTEM_PARAMETERS_ALL table. Use Oracle Order Management to associate Inventory Organization IDs with operating units.

A.11 Oracle Bills of Material (BOM) Profile Options

Set the profile options in this section at the following levels:

- **Site**
- **Application**—iStore
- **Responsibility**—IBE_CUSTOMER and any other Oracle iStore 11i customer user responsibility

The following table describes the BOM profile options.

Table A-19 BOM Profile Options

Profile Option Name	Value	Description
BOM: Configurator URL of UI Manager	Oracle Configurator Servlet URL	This profile specifies the URL for the Oracle Configurator Servlet. If you are using Oracle Configurator for product configurations in Oracle iStore 11i, you must set this profile option.

A.12 Oracle Contracts Core (OKC) Profile Options

Set the profile options in this section at any of the following levels:

- **Site**
- **Application**—iStore
- **Responsibility**—IBE_CUSTOMER and any other Oracle iStore 11i customer user responsibility

The following table describes the OKC profile options.

Table A-20 OKC Profile Options

Profile Option Name	Value	Description
OKC: Change Request Approver	User name	This profile option specifies the Oracle Contracts user who can approve, reject, or forward contract terms and conditions change requests.

Table A–20 OKC Profile Options (Cont.)

Profile Option Name	Value	Description
OKC: Contract Approver	User name	This profile option specifies the Oracle Contracts user who can approve contract terms and conditions change requests, or forward them to the user named in the OKC: Change Request Approver profile option.
OKC: Contract template for standard terms and conditions	Oracle Contracts template name	This profile option specifies the default Oracle Contracts template name. You can set up different Oracle Contracts templates for each Oracle iStore 11i customer user responsibility. Oracle iStore 11i displays the terms and conditions of this contract template when the user clicks Review Terms and Conditions in the Order Review page.
OKC: Default contract administrator for notifications	User name	This profile option specifies the contract administrator who receives a notification when an Oracle iStore 11i user rejects standard terms and conditions. The notification appears in the contract administrator's Oracle Contracts inbox. Note: This contract administrator must also be a CRM Resource.
OKC: Default group for contracts created from quote	Oracle Contracts group	This profile option specifies the default group for contracts created from Oracle iStore 11i shopping carts. It is optional.
OKC: Notify administrator about new contract from iStore	Yes	This profile option specifies whether the contract administrator named in the OKC: Default contract administrator for notifications profile option receives a notification when a new contract is created in Oracle iStore 11i.
OKC: User Directory (Site level only)	Absolute directory path	This profile option specifies the absolute directory path to the XSL style sheet for contracts.

A.13 Concurrent Program Manager Profile Options

Set the profile options in this section at the following levels:

- **Responsibility**—iStore Concurrent Programs Responsibility

The following table describes the profile option values for the concurrent program manager.

Table A–21 Profile Options for the Concurrent Program Manager

Profile Option Name	Value ¹
ASO: Default Order Type	Standard
ASO: Default Salesrep	No Sales Credit
ASO: Validate Salesrep	No

¹ Generally, set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility.

A.14 Site-Level Profile Options

Set the profile options in this section at the following levels:

- **Site**

The following table describes the site-level profile option values.

Table A–22 Site-Level Profile Options

Profile Option Name	Value
Sequential Numbering	Partially Used

Seeded Responsibilities

This appendix lists the Oracle Forms, Oracle CRM Applications, and Oracle iStore 11i Customer UI users and responsibilities necessary to implement Oracle iStore 11i.

You can create new users and responsibilities, and assign responsibilities as needed. See *Oracle Applications System Administrator's Guide*, *Oracle CRM Technology Foundation Implementation Guide*, and *Oracle CRM Technology Foundation Concepts and Procedures* for more information.

Topics include:

- [Oracle Forms Responsibilities](#)
- [Oracle CRM Applications Responsibilities](#)
- [Oracle iStore 11i Customer UI Responsibilities](#)

B.1 Oracle Forms Responsibilities

Access Oracle Forms by navigating to:

`http://<host>:<apache port>/`

and clicking **Apps Logon Links > VIS Logon through the Forms cartridge**. Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle iStore 11i in Oracle Forms.

Table B-1 Oracle Forms Responsibilities

Responsibility	Tasks
AK Developer	Define regions in Apps to troubleshoot Postsales errors. See Section 8.14, "Postsales Errors" for details.
Application Developer	<p>Enable or disable B2B or B2C user registration. See Section 5.11.1, "Setting Up Customer Registration" for details.</p> <p>Modify messages to change the text in the Customer UI bins. See Section 6.3.1, "Creating Template Source Files" for details.</p> <p>Set up descriptive flexfields to appear on item detail pages. See Section 6.7.2, "Adding Item Descriptive Flexfields" for details.</p> <p>Set up comment flexfields to appear on the checkout page. See Section 6.8.4, "Specifying Flexfields At the Checkout Page" for details.</p>
Apps for the Web Manager	Define regions in Apps to troubleshoot Postsales errors. See Section 8.14, "Postsales Errors" for details.
General Ledger Super User	Set the daily currency conversion rate in Oracle General Ledger for Storefront Reports. See Section 5.10.3, "Setting Up Conversion Rates for Storefront Reports" for details.
Inventory responsibility for the Master Inventory Organization	<p>Publish items in Oracle Inventory to make them available for sale in the specialty stores. See Section 3.1.8, "Setting Up Product Items in Oracle Inventory" and Section 5.7, "Building the Product Catalog" for details.</p> <p>Specify in Oracle Inventory if customers can order decimal quantities of an item in the specialty stores. See Section 6.8.3, "Allowing Decimal Quantities for Items" for details.</p>

Table B–1 Oracle Forms Responsibilities (Cont.)

Responsibility	Tasks
iStore Concurrent Programs Responsibility	<p>Schedule the concurrent program iStore - Express Checkout Order Submission to submit Express Checkout orders. See Section 5.2.4, "Scheduling Concurrent Programs" for details.</p> <p>Run the concurrent programs iStore Search Insert and iStore Section Search Refresh when setting up product searches. See Section 5.8, "Setting Up the Product Search" for details.</p> <p>Schedule or run the request set iStore Reports Complete Data Refresh Set, which has the concurrent programs iStore Reports Fact Tables Refresh and iStore Reports Materialized Views Refresh, to prepare data for Storefront Reports. See Section 5.10.4, "Preparing Data for Storefront Reports" for details.</p> <p>Schedule or run the request set iStore Reports Increment Data Refresh Set, which has the concurrent programs iStore Reports Fact Tables Refresh and iStore Reports Materialized Views Refresh, to increment data for Storefront Reports. See Section 5.10.4, "Preparing Data for Storefront Reports" for details.</p>
Oracle Pricing Manager	Set up Oracle Pricing. See Section 3.1.11, "Setting Up Oracle Pricing" for details.
Order Capture Sales Manager	<p>Set up Oracle Order Capture. See Section 3.1.13, "Setting Up Oracle Order Capture" for details.</p> <p>Check to make sure Oracle Order Capture is working when troubleshooting problems with adding items to shopping carts or placing orders. See Section 8.16, "Reporting Issues" for details.</p>
Order Management Super User	<p>Set up Oracle Order Management. See Section 3.1.12, "Setting Up Oracle Order Management" for details.</p> <p>Set up Web-enabled shipping methods. See Section 3.1.12, "Setting Up Oracle Order Management" for details.</p>
Receivables Manager	<p>Set up Oracle Receivables. See Section 3.1.10, "Setting Up Oracle Receivables" for details.</p> <p>Set up Oracle Receivables for credit card payments in Oracle iStore 11<i>i</i>. See Section 12.2, "Setting Up Oracle iPayment" for details.</p>

Table B-1 Oracle Forms Responsibilities (Cont.)

Responsibility	Tasks
System Administrator	<p>Set Oracle CRM Technology Foundation (JTT) profile options. See Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI" for details.</p> <p>Set Oracle iStore (IBE) profile options. See Section 3.1.14, "Setting Profile Options for the Oracle iStore 11i Merchant UI" and Section 5.12.1, "Setting Oracle iStore 11i (IBE) Profile Options for the Customer UI" for details.</p> <p>Set up Oracle iStore 11i store manager user accounts. See Section 5.1, "Setting Up Store Manager User Accounts" for details.</p> <p>Set profile options for the responsibility iStore Concurrent Programs Responsibility. See Section 5.2.2, "Setting Concurrent Program Manager Profile Options" for details.</p> <p>Set up a user as the concurrent program manager. See Section 5.2.3, "Creating a Concurrent Program Manager" for details.</p> <p>Check the status of concurrent program requests. See Section 5.2.5, "Checking Concurrent Program Status" for details.</p> <p>Set up the Oracle iStore 11i guest user account. See Section 5.3, "Setting Up the Guest User Account" for details.</p> <p>Set Oracle Order Capture (ASO) profile options. See Section 5.12.2, "Setting Oracle Order Capture (ASO) Profile Options" for details.</p> <p>Set Oracle Order Management (OM) profile options. See Section 5.12.3, "Setting Oracle Order Management (OM) Profile Options" for details.</p> <p>Set Multiple Organization (MO) profile options. See Section 5.12.4, "Setting Multiple Organization (MO) Profile Options" for details.</p> <p>Set site-level profile options. See Section 5.12.5, "Setting Site-Level Profile Options" for details.</p> <p>Enter values for the descriptive flexfields that appear on item detail pages when they are set up with the Application Developer responsibility. See Section 6.7.2, "Adding Item Descriptive Flexfields" for details.</p> <p>Set the profile option BOM: Configurator URL of UI Manager. See Section 10.4, "Setting Up Oracle Configurator" for details.</p> <p>Set up credit card payments in Oracle iStore 11i. See Section 12.2, "Setting Up Oracle iPayment" for details.</p>

B.2 Oracle CRM Applications Responsibilities

Access the Oracle CRM Applications login page at:

`http://<host>:<apache port>/OA_HTML/jtfllogin.jsp`

Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the user names and responsibilities necessary to perform setup and administrative tasks for Oracle iStore 11i in Oracle CRM Applications.

Table B-2 Oracle CRM Applications Users and Responsibilities

User	Responsibility	Tasks
<Store Manager User Account>	IBE_ADMINISTRATOR Logging in with this responsibility launches the Oracle iStore 11i Merchant UI.	<p>Set up and modify specialty stores. See Section 5.5, "Creating Specialty Stores" for details.</p> <p>Set up and modify the hierarchy. See Section 5.6, "Creating the Hierarchy" for details.</p> <p>Set up and modify the product catalog. See Section 5.7, "Building the Product Catalog" for details.</p> <p>Set up notification configurations. See Section 5.9, "Setting Up Notifications" for details.</p> <p>Set up store appearance by managing multimedia, multimedia components, templates, and display styles at item, category, section, and store level. See Chapter 6 for more information.</p> <p>Set up product relationships. See Section 6.5, "Creating Product Relationships" for details.</p> <p>Manage the product and section caches. See Section 6.10, "Managing the Cache" for details.</p>

Table B–2 Oracle CRM Applications Users and Responsibilities (Cont.)

User	Responsibility	Tasks
SYSADMIN	CRM HTML Administration Logging in with this responsibility launches the Oracle CRM System Administrator Console.	<p>Set up Oracle CRM Technology Foundation. See Section 3.1.15, "Setting Up Oracle CRM Technology Foundation" for details.</p> <p>Set up the Oracle iStore 11i guest user account as the Oracle CRM Technology Foundation self-service user. See Section 5.3.1, "Creating the Guest User" for details.</p> <p>Set up default roles and responsibilities for customer users. See Section 5.11, "Setting Up Oracle iStore 11i Customer User Registration" for details.</p> <p>Create B2B user roles. See Section 6.9, "Creating B2B User Roles" for details.</p>

B.3 Oracle iStore 11i Customer UI Responsibilities

Customers are also assigned user names and responsibilities, which customize their Web store experience. At least one customer responsibility is assigned to each customer name when the name is approved during user registration. You can use the seeded IBE_CUSTOMER responsibility and create other customer responsibilities too.

In a multiple operating unit environment, you need to create a customer responsibility for each operating unit if you want a customer to access only items from the Inventory Organization specific to each operating unit.

In the Merchant UI, you can specify a list of the customer responsibilities that are supported by a given specialty store. You can select these from all existing responsibilities. You can also specify for a given specialty store whether Oracle iStore 11i checks the customer's responsibilities and grants access only if the customer has an assigned responsibility that is supported by the specialty store.

If multiple responsibilities are supported by a specialty store, a customer who logs in to the store must choose one responsibility for that session. The responsibility uniquely identifies the operating unit against which any orders placed during the session will be booked. The responsibility is assigned only for the current session.

If you set up a specialty store to check the customer's responsibility, the customer can choose only from the responsibilities that have been assigned to him or her during registration. If the specialty store is not set up to check the customer's

responsibility, then the customer can choose any supported responsibility in any specialty store that does not check the customer's assigned responsibilities.

The following table summarizes the responsibilities seeded by Oracle iStore 11i for Web store customers to use in the Customer UI, located at:

`http://<host>:<apache port>/OA_HTML/ibeCZzdMinisites.jsp`

Table B-3 Oracle iStore 11i Customer UI Users and Responsibilities

User	Responsibility	Tasks
<Guest User Account>	IBE_CUSTOMER	The guest user name is assigned to every customer who browses the store without registering. You must assign the IBE_CUSTOMER responsibility or another customer responsibility as a default for guest users. See Section 5.3, "Setting Up the Guest User Account" for details.
<Customer User Account>	IBE_CUSTOMER	Select IBE_CUSTOMER or another customer responsibility to be assigned by default to every registered customer. See Section 5.11.2, "Setting Default Customer Responsibilities" for details.

Self-Service Administration

This appendix describes the tasks required to manage a store using the iStore Self-Service Administrator UI instead of the Merchant UI. Topics include:

- [The iStore Self-Service Administrator UI](#)
- [Home Page](#)
- [Store](#)
- [Catalog](#)
- [Pricing](#)
- [Orders](#)
- [Currency and Language](#)

C.1 The iStore Self-Service Administrator UI

The iStore Self-Service Administrator UI enables easy deployment of Oracle iStore 11*i*. Product descriptions, availability, and pricing can be revised or added to a Web site quickly and easily. With this ability to act quickly, merchants can set themselves apart from the competition and reach the market faster.

C.1.1 Benefits of Self-Service Administration

B2C retailers can rapidly deploy Web stores. Self-service setups provide the following:

- One-stop easy setup
- Point-click-customize storefront
- Easy catalog management through self-service upload and download functionality, eliminating the need for the daily assistance of technical staff
- Seamless integration with Oracle's existing CRM and ERP applications: Oracle Inventory, Oracle Pricing, Oracle Order Management, Oracle Contracts, Trading Community Architecture (TCA)
- Integration with backend fulfillment systems
- Global and scalable application with high availability

C.1.2 Components of Self-Service Administration

Self-service setups for Oracle iStore 11*i* leverage existing CRM and ERP applications and are fully integrated with the Oracle e-Business Suite. The following functionality is included in the self-service setups:

- **Store Setup:** Store Setup allows merchants to set up the supported currencies, languages, locations (bill-to and ship-to countries), payment types, notifications, and shipping methods. Merchants can set up sales tax for all U.S. states and item exceptions for sales tax, using the store setup screens.
- **Storefront Setup:** Merchants can create storefronts with custom content, logo, layout, and colors using a point-and-click interface that does not require knowledge of HTML.
- **Enhanced Catalog Management:** Merchants can create sections, products with basic prices, and multimedia. They can perform bulk upload and download of products. Both XML and CSV formats are supported.

- **Pricing and Promotion Management:** Merchants can create price lists and manage percent and price override discounts for customers and products. Percent and flat rate freight charges can be created for all shipping methods. Batch upload and download of price lists is also supported.
- **Order Management:** Self-service order management provides order history for customers. Orders can be downloaded from the system and interfaced with a backend fulfillment system. Both CSV and XML formats are supported for order management.

C.1.3 Restrictions of Self-Service Administration

Your organization must meet the following criteria before you can use the iStore Self-Service Administrator UI to implement Oracle iStore 11i:

- You are implementing Oracle iStore 11i for the first time.
- You support only B2C accounts.
- You have never used the Oracle iStore 11i Merchant UI to modify your store in any way. This restriction holds true even if you originally set up your store in the iStore Self-Service Administrator UI.
- You are using the seeded Oracle iStore 11i templates.
- You are only doing business in the U.S.
- You support only price override and percentage discounts.
- You support only flat and percentage freight charges based on order amounts.

Organizations that fit the above criteria can use self-service setups. Otherwise, you should use the Oracle iStore 11i Merchant UI.

C.1.4 Setting Up a Self-Service Administrator Account

You must have the iStore Self-Service Administrator responsibility to access the iStore Self-Service Administrator UI. Use the following procedure to create a user account with the iStore Self-Service Administrator responsibility.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Security > User > Define**.

The Users window opens.

3. In the User Name field, enter the user name that the store manager will use to log in to the Oracle iStore 11i Merchant UI.
4. In the Password field, enter the store manager's password.
5. In the Responsibilities block, choose **iStore Self Service Administrator** from a Responsibility LOV.
6. Save the user record.
7. In the Navigator, choose **Profile > System**.
The Find System Profile Values window opens.
8. Check **User**, and choose the store manager's user name from the User LOV.
9. In the Profile field, enter JTF_PROFILE%.
10. Click **Find**.
The System Profile Values form opens with the results of your search.
11. Verify or set the profile options listed in the following table at the user level for this store manager:

Table C-1 User-Level Profile Options for Self-Service Administrators

Profile Option Name	Value	Description
JTF_PROFILE_DEFAULT_APPLICATION	671	Default application ID (671=iStore)
JTF_PROFILE_DEFAULT_RESPONSIBILITY	23033	Default responsibility ID (23033=iStore Self Service Administrator)

C.1.5 Self-Service Administrator Profile Options

If you choose to implement a Web store using the Self-Service Administrator UI, you must set the related profile options. Use the following procedure to set these profile options.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Go to **Profile > System**.
The Find System Profile Values window opens.

3. Check **Site, Application, and Responsibility**. Select **iStore** as the application and **iStore Self Service Administrator** as the responsibility.
4. In the Profile field, enter `IBE%EOS%`. Click **Find**.
5. Verify or set the Self-Service Administrator profile options listed in the following table at site, application, responsibility, or user level as required.

Table C-2 Self-Service Administrator Profile Options

Profile Option Name	Description
IBE: EOS Admin Specialty Store	This profile specifies the specialty store that is currently active.
IBE: EOS Allow Close Order	This profile is not in use.
IBE: EOS Allow Contract Approval	This profile is not in use.
IBE: EOS Default Price List	This profile specifies the default price list.
IBE: EOS Display Home Bins	This profile specifies whether the home page bins are displayed.
IBE: EOS File Location	This profile specifies the directory location of the files for your specialty store.
IBE: EOS Media Location	This profile specifies the directory location of the media source files for your specialty store.
IBE: EOS Ship Carrier	This profile specifies the available shipping carrier for your specialty store.

C.2 Home Page

The Home page is the landing page for the self-service application. From this page, merchants can see a summary of store activity, top customers, top orders, and top selling products. The background job status box is also on the Home page, enabling users to review completed jobs, and those in process.

C.2.1 Background Job Status Box

This bin shows the status of store jobs. Jobs are typically upload or download requests.

Job status can be:

- In Process—A job is in the queue, or is currently running with normal conditions.
- Completed Successfully—A job has completed with no errors.
- Completed with Errors—A job has completed with errors.
- Inactive—A job is disabled, on hold, or has no manager.

To see the jobs with a particular status, click the number hyperlink next to the job status. This opens the Background Job Search window, which lists all jobs of the specific status. To see a background job's details, select its radio button from the search result list and click **View Details**.

C.2.1.1 Searching for a Background Job

To search for a job type, enter its job number and click **Go**. If you do not know the job number, go to the advanced search page by clicking **Advanced**.

The advanced search for background jobs enables you to search for jobs by the date the job was submitted or completed, job number, job status, and description. Enter your query and click **Go**.

Note: The list of statuses on the advanced search page is more detailed than the list in the background job bin.

To see a background job's details, select its radio button from the search result list and click **View Details**.

C.2.1.2 Background Job Details

The Background Job Details page shows the job details and all errors and warnings that occurred during processing.

Errors indicate that the record in the line number was not processed at all.

Warnings indicate that although the record was processed, there was a possible discrepancy that you should investigate.

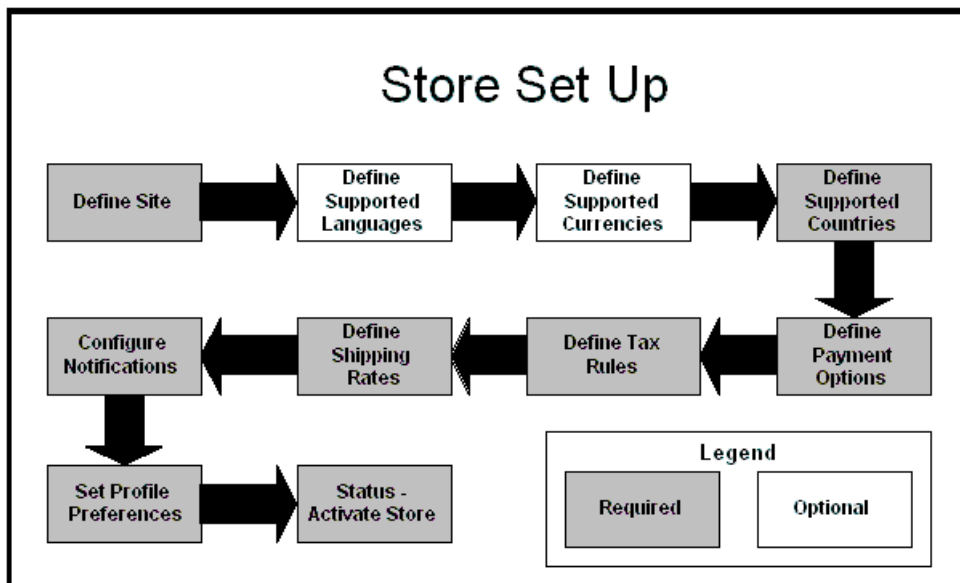
C.3 Store

From the Store tab, store managers can set up basic business fundamentals as well as customize the look and feel of their store front.

C.3.1 Defining the Store Site

Before a store can open for business, basic site information must be set up. After the store is open, some of these settings can be changed, but the merchant must be careful to minimize the impact on customers.

The process flow below illustrates the steps in the site definition. The grey boxes indicate required steps, while the steps in white boxes are optional.



C.3.2 Site

Use this procedure to define your site, or to change existing settings.

1. Select the Store tab.

The Site window opens under the Set Up subtab.

2. Complete the Site Information section. Fields with an asterisk (*) are required:

- a. *Site Name field: Enter the name of your site.
- b. Site description field: Enter your store description. This description will be used by some external search engines. Make sure the description clearly communicates what your store sells so you can attract buyers.
- c. *Default Language: Select the language that your company uses regularly. If you operate internationally, select the language in which most of your content will originate.
- d. *Default Currency: Select the base currency in which you do business.
- e. Disable Walk in Users: Select this checkbox if you want to require all site visitors to register with your store before they can browse your inventory.
- f. Site Status: A read only field indicating store status. New stores default to closed until they are explicitly activated. See "[Status](#)" for more details.

3. Click **Apply** to save your site settings.

C.3.3 Language

Merchants can manage their store in multiple languages. This feature is extremely beneficial when selling to a global market, but it does require the merchant to supply necessary translations for each supported language.

If a single default language is defined in the site setup, then this will be the only language supported. See "[Defining the Store Site](#)".

Use this procedure to define the languages your store will support.

1. Select the Store tab.

The Site window opens under the Set Up subtab.

2. Select **Language** from the side navigation list menu.

The Store Languages window opens.

3. Find the languages that your store will support.

Note: Click **Next** at the bottom of the table to view the complete language list.

4. Enable the languages you want by selecting their checkboxes.
5. Save selections by clicking **Apply**.

You will need to click **Apply** for every set of languages before you click **Next**.

C.3.4 Currency

Merchants can do business in many currencies. This is an advantage for international businesses that must support multiple currency price lists.

If your store will only support the default currency, then skip this procedure.

Use this procedure to define the currencies you want to support.

1. Confirm that a price list exists for the currency that you want to enable.
See "[Creating New Price Lists](#)" for more details.
2. Select the Store tab.
The Site window opens under the Set Up subtab.
3. Select **Currency** from the side navigation list menu.
The Currency and Price Lists window opens.
4. Enable currencies by selecting their checkboxes.
5. Select the price list that should be effective for the currency.
6. Save selections by clicking **Apply**.

C.3.5 Country

Merchants may choose not to do business with certain countries for various reasons. Merchants can block a customer from buying from their store in two different ways:

- Stop a transaction if the Ship To location is in a country that the merchant does not do business with
- Stop a transaction if the Billing Address of the customer is in a country that the merchant does not do business with.

Use this procedure to define the countries your store will do business with.

1. Select the Store tab.
The Site window opens under the Set Up subtab.

2. Select **Countries** from the side navigation list menu.
The Bill To/Ship To Locations window opens.
3. Find the countries that you will do business with by searching for the countries or clicking **Next** at the bottom of the table to view the complete list of countries.
4. Enable the countries as Bill To or Ship To locations.
5. Save selections by clicking **Apply**.

C.3.6 Payment

Merchants must select the customer payment options that they want to support. Merchants will receive orders with payment information specific to the option that was selected by the customer. Merchants are responsible for authorizing and taking payment themselves.

Use this procedure to define the payment options that you want to support.

1. Select the Store tab.
The Site window opens under the Set Up subtab.
2. Select **Payment** from the side navigation list menu.
The Payment Types window opens.
3. Enable all payment options that you want to support by clicking their check boxes.
4. Save selections by clicking **Apply**.
You may need to click **Next** at the bottom of the table to find additional payment options.

C.3.7 Tax

Merchants can set up tax rules for sales within the United States. Merchants are responsible for maintaining the tax rate that they will charge for each state.

Taxes are based on the buyer's Ship To location. Merchants must specify the states for which they want to charge tax.

Use this procedure to define the U.S. tax rates for your store.

1. Select the Store tab.
The Site window opens under the Set Up subtype.

2. Select **Tax** from the side navigation list menu.
The US Sales Tax Rates window opens.
3. Fill in the tax rate for each state where tax will be charged.
Note: 8.5% should be entered as 8.5. For states that you are not charging tax, leave 0.
4. Click **Apply** when you finish entering rates on a page.
5. Click **Next** to retrieve the next set of states.
6. Repeat steps 3-5 until you finish entering all of your tax rates.

C.3.7.1 State Tax Item Exceptions

Some items in your inventory may have a different state tax rate. For example, tax in the state of California is 8.25%, but cigarettes have a much higher tax of 20.5%.

Use the following procedure to configure item state tax exceptions.

1. From the US Sales Tax Rate page, click **Item Exceptions**.
The Item Exception Detail window opens.
2. Click **Add Item Exception**.
The Add Item Exception window opens.
3. Enter the item number.
If you do not know the exact item number, click the flashlight and search for the item. Select the item from the result list and click **Apply**.

Note: Searches are case sensitive.

4. Pick the state. Enter the exception rate and the start and end dates for this exception.
You can leave dates blank.
5. Click **Add Another Row** to add a new row for state tax exceptions.
6. Repeat steps 4 and 5 for every state exception for this item.

C.3.8 Shipping

Use this procedure to define the shipping charges.

1. Select the Store tab.

The Site window opens under the Set Up subtab.

2. Select **Shipping** from the side navigation list menu.

The Shipping Method window opens.

3. To create a new shipping method:

- a. Click **Create Shipping Method**.

A new row in the shipping method table is inserted.

- b. Fill in the name of the shipping method.

The customer will see the name when selecting his or her shipping preference, so you should make the name descriptive.

- c. Save the new method by clicking **Apply**.

4. Create freight calculation methods for the shipping method.

If you do not want to bill the customer for this method, then you can skip this step.

- a. Click the Freight update icon next to the method name.

The Shipping Method Details window opens.

- b. Click **Create Freight Calculation Method**.

The Create Freight Calculation Method window opens.

- c. Select the calculation method.

- d. Select currency.

- e. Save changes by clicking **Apply**.

5. Define calculation rules.

You can define different shipping calculation rules based on the calculation method that you have chosen. For example, if you chose **Percentage Based on Order Amount** as your calculation method, then you may want to charge 20% of the order for all orders under \$30, 10% for all orders between 30 and 100, and 7% for all orders over \$100. You cannot create overlapping amount ranges.

The following table shows an example of these freight calculation rules.

Order Amt From	Order Amount To	Percentage
0	30	20
30.01	100	10
100.01	999,999,999	7

6. Save the calculation rules by clicking **Apply**.
7. Test the calculation rules.
Test shipping rules with the Rules Test Calculator, located below the rules table.
8. Enable the shipping method.
 - a. Click **Return to Shipping Details** in the Freight Calculation page.
 - b. Enable the calculation method by selecting the Enable checkbox and clicking **Apply**.
 - c. Return to the Shipping Methods window and confirm that the shipping method is also enabled.

C.3.9 Notification

To set up customer notifications, use the following procedure.

1. Select the Store tab.
The Site window opens under the Set Up subtab.
2. Select **Notifications** from the side navigation list menu.
The Notifications window opens.
3. Customize the text for each notification.
 - a. Click **Update** for each notification.
The Notification Details window will open.
 - b. Customize the text of the notification.
 - c. Click **Apply** to save your changes.
4. Repeat for each enabled notification.

The following table lists all of the available notifications with the set of tags available to each.

Notification	Tag	Description
Account Registration Notification	&FIRSTNAME	User's registered first name
	&LOGINNAME	User's login name
	&PASSWORD	User's password
Close Order Notification	&STOREADDRESS	The customer's ship to address
	&ORDERHEADER	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERDETAIL	Contains the products purchased with quantity, licensing unit, shipping status, and amount
	&ORDERSUM	Contains the total sum of the order including tax and shipping
Contract Term Approved	&FIRSTNAME	User's registered first name
	&CONTRACTREF	
	&CARTNAME	
Customer Notification on Request for Sales Assistance	&ORDERHEADER	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERDETAIL	Contains the products purchased with quantity, licensing unit, shipping status, and amount
	&ORDERFOOTER	Contains the shipping cost, tax estimate, and total order amount

Notification	Tag	Description
Notification for Customer Quote	&ORDERHEADER	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERDETAIL	Contains the products purchased with quantity, licensing unit, shipping status, and amount
	&ORDERFOOTER	Contains the shipping cost, tax estimate, and total order amount
Notification to Salesrep for Customer Quote	&ORDERHEADER	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERDETAIL	Contains the products purchased with quantity, licensing unit, shipping status, and amount
	&ORDERFOOTER	Contains the shipping cost, tax estimate, and total order amount
Order Confirmation Notification		E-mail notification sent to customers after they submit their orders
	&ORDERHEADER	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERDETAIL	Contains the products purchased with quantity, licensing unit, shipping status, and amount
Order Confirmation for Faxed Orders		E-mail notification sent to customers after they fax their purchase orders
	&ORDERHEADER	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERDETAIL	Contains the products purchased with quantity, licensing unit, shipping status, and amount

Notification	Tag	Description
Salesrep Notification on Request for Sales Assistance	&ORDERFOOTER	Contains the shipping cost, tax estimate, and total order amount
	&ORDERHEADER	E-mail sent to the merchant when the customer does not accept the standard terms of a contract
Order has been shared	&ORDERDETAIL	Contains the order number, tracking number, ship date, ship method, and the ship to address
	&ORDERFOOTER	Contains the products purchased with quantity, licensing unit, shipping status, and amount
	&ORDERFOOTER	Contains the shipping cost, tax estimate, and total order amount
	\$QUOTENAME	When a customer shares his cart, an e-mail is sent to the sharee to notify him or her
	&COMMENTS	The name of the shopping cart
	&PASSWORD	The sharer's comments
		The password to the cart

C.3.10 Profile Preferences

Use the following procedure to set up basic profile options.

1. Select **Store Profiles** from the side navigation menu.
2. Complete the form. Descriptions of each preference are below.

C.3.10.1 Catalog

- **Display number of items per page:** The number of items that are displayed on a leaf section page. If the number of items in the section exceeds this value, the page displays a Next link. This profile defaults to value 20.
- **Display number of sections per page:** The number of sections that appear on a page. Customers will be able to see all sections by clicking **Next**.
- **Display number of items per section:** The maximum number of items that are displayed per section. If the profile is not set, all items in a section are displayed.

C.3.10.2 Shopping Cart

- **Expiration Duration:** The number of days that an inactive shopping cart is available to the customer.
- **Price Frozen Duration:** The number of days to maintain original prices on shopping cart items.
- **Use Shopping List:** Allow customers to create shopping lists.
- **Use Sales Assistance:** Allow customers to request sales assistance.
- **Sales Assistance Username:** The username of the sales representative responsible for assisting online customers. This user will receive the sales assistance notifications at the e-mail address that is set up in his or her profile.

C.3.10.3 Orders

- **Use Express Check out:** Allow users to check out quickly by using their profile information.
- **Order Admin Username to send notification:** The username of the merchant that should get the order information. This user will receive the order notifications at the e-mail address that is set up in his or her profile.

C.3.10.4 Contracts

- **Use Contracts:** Enable the contracts feature.

C.3.11 Status

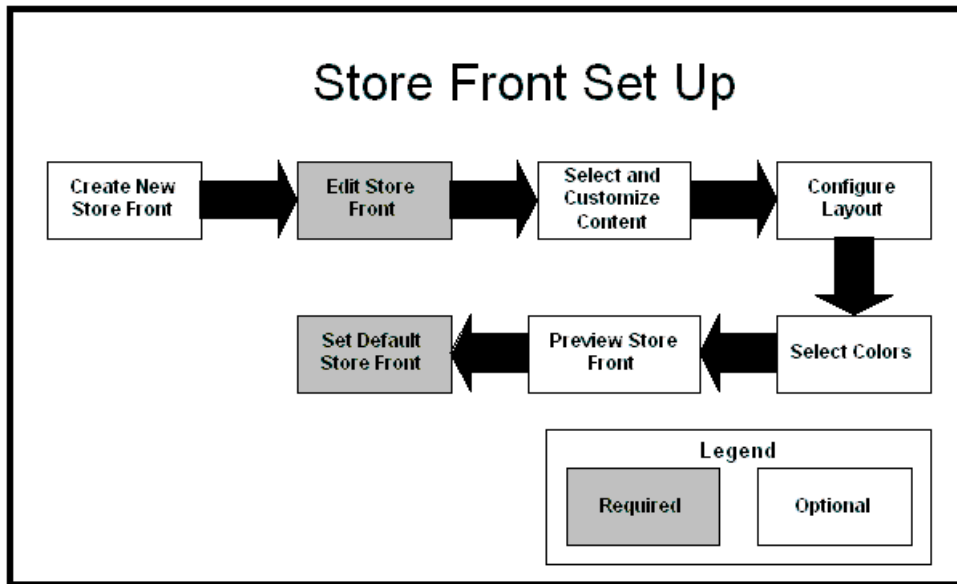
Use the following procedure to check the status of your store and to open or close it to the public.

1. Select the Store tab.
The Site window opens under the Setup subtab.
2. Select **Status** from the side navigation menu.
The Store Status window opens. Check that all of the information is correct.
3. Click **Open Store**. If your store is already open, the **Close Store** button appears instead.

C.3.12 Store Front

A Store Front is the look and feel of your online store. You can set up several store fronts, but only one can be active at a time.

The process flow below illustrates all of the steps required to set up a new store front.



C.3.13 Creating New Store Fronts

If your store is already active and you want to change the look and feel without affecting your customers, then you must create a new store front.

There are two ways to create a new store front.

Use this procedure to create a new store front with no defaults set.

1. Select the Store tab.
The Site window opens under the Set Up subtab.
2. Select the Store Front subtab.
The store front window opens.

- 3. Click **Create Store Front**.**

The store front details window opens.

- 4. Enter the site name and description.**

These values are for the merchant only. Customers will not see them.

- 5. Save your changes by clicking **Apply**.**

Use this procedure to create a new store front by duplicating an existing one.

- 1. Select the Store tab.**

The Site window opens under the Set Up subtab.

- 2. Select the Store Front subtab.**

The Store Front window opens.

- 3. Select the radio button of the store front that you want to duplicate.**

- 4. Click **Duplicate**.**

The Store Front details window opens.

- 5. Modify the store front name and description.**

Two store fronts cannot have the same name.

- 6. Save your changes by clicking **Apply**.**

C.3.14 Editing Existing Store Fronts

Use this procedure to edit a store front.

- 1. Select the Store tab.**

The Site window opens under the Set Up subtab.

- 2. Select the Store Front subtab.**

The Store Front window opens.

- 3. Select the radio button of the store front that you want to edit.**

- 4. Click **Update**.**

The Store Front Details window opens.

- 5. Modify the store front details.**

- 6. Click **Apply** to save changes.**

You can also delete an existing store front by selecting it from the table and clicking **Delete**.

Note: You cannot delete active store fronts.

C.3.15 Store Front Content

You can customize the content your customers will see on your store front with Bins, special pages, and a store logo.

C.3.16 Bin Content Selection

Bins are sections of content that are grouped together on the section pages. A merchant can have up to six Bins on a page.

Use this procedure to select the Bins you want to display.

1. Go to the Update window for your store front.
Follow the instructions in "[Editing Existing Store Fronts](#)".
2. Select **Content** from the side navigation list menu.
The Content Container (Bins) window opens.
3. Select the Bins that you want to display.
4. Save your changes by clicking **Apply**.

Custom Bins

Use the following procedure to modify the content of the Custom Bins.

1. From the Content Container (Bins) window, click the **Update** button of the Custom Bin that you want to edit.
The Customize Bin Content window opens.
2. Enter the Bin Title and Body with plain text.
3. Save the Custom Bin definition by clicking **Apply**.
4. Click **Preview** to preview the Bin's appearance.

C.3.17 Special Pages

Special pages are used by merchants to communicate important information about their store. Use the following procedure to set up the special pages of your site.

1. Go to the Update window for your store front.
Use the instructions in ["Editing Existing Store Fronts"](#).
2. Select **Content** from the side navigation list menu.
The menu expands with submenu items.
3. Select **Special Pages** from the side navigation list menu.
The Special Pages Window opens.
4. Select the special pages that you want to include on your site.
5. Save your selections by clicking **Apply**.

Customizing Special Pages

Use the following procedure to customize the content of a special page.

1. From the Special Page window, click the **Update** button of the special page that you want to edit.
The Customize Special Page Content window opens.
2. Enter the special page title and body with plain text.
3. Save the special page content by clicking **Apply**.
4. Click **Preview** to preview the special page's appearance.

Note: Each store front can have a unique set of special pages. If you are creating a new store front, then you must redefine these pages. However, if you are creating a new store by duplicating an existing one, you will get a copy of the other store front's special pages.

C.3.18 Store Logo

Your store logo should have the actual name of your store, as well as the image that represents it.

To select your store logo, use the following procedure.

1. Go to the Update window for your store front.
Use the instructions in ["Editing Existing Store Fronts"](#).
2. Select **Content** from the side navigation list menu.
The menu expands with submenu items.
3. Select **Store Logo** from the side navigation list menu.
The Store Logo Window opens.
4. Click the flashlight icon to search for your store logo in the multimedia library.
If you cannot find your logo in the multimedia library, then upload it. For more information, see ["Multimedia"](#).
5. Click **Apply** to save changes.

C.3.19 Configuring Layout

In this section you will determine how the content is displayed in your store. There are three major parts to this section:

- [Page Layout](#)
- [Bin Locations](#)
- [Display Styles](#)

C.3.19.1 Page Layout

Page Layout represents the general layout for all Web pages in your store.

Use this procedure to select your preferred layout.

1. Go to the Update window for your store front.
Use the instructions in ["Editing Existing Store Fronts"](#).
2. Select **Layout** from the side navigation list menu.
The menu expands with submenu items, and the Page Layout window opens.
3. Select your preferred page layout.

4. Save your choice by clicking **Apply**.

C.3.19.2 Bin Locations

Bin locations enable you to manipulate the order and arrangement of the Bins that were selected earlier. See "[Bin Content Selection](#)".

Use this procedure to arrange the location of your Bins.

1. Go to the Update window for your store front.

Use the instructions in "[Editing Existing Store Fronts](#)".

2. Select **Layout** from the side navigation list menu.

The menu expands with submenu items, and the Page Layout window opens.

3. Select **BIN Locations** from the side navigation list menu.

The Bin Locations and Order window opens.

4. Use the arrows to arrange the location and order of the Bins.

5. Save your changes by clicking **Apply**.

6. Preview the Bin arrangement by clicking **Preview**.

A separate window launches with your store front content shown in preview mode. When you finish previewing, close the window and return to the store manager.

C.3.19.3 Display Styles

In this section, you will select the default layout of each type of page in your store. There are four major page types:

- **Items:** An Item page is what the user will see when looking at a single product in your store. This page has all the information about that product.
- **Leaf Sections:** Sections that contain items are called Leaf Sections. These pages show the list of products in the section.
- **Non Leaf Sections with Featured Subsections:** Sections with subsections are called Non Leaf Sections. The page layout of Non Leaf Sections with Featured Subsections displays both the subsections and the items of the featured subsections.
- **Non Leaf Sections without Featured Subsections:** The page layout of Non Leaf Sections without Featured Subsections displays subsections only.

Use the following procedure to configure the display styles.

1. Go to the Update window for your store front.
Use the instructions in ["Editing Existing Store Fronts"](#).
2. Select **Layout** from the side navigation list menu.
The menu expands with submenu items, and the Page Layout window opens.
3. Select **Display Styles** from the side navigation list menu.
The Display Styles window opens.
4. Select a default style for each page type.
5. Save your changes by clicking **Apply**.

C.3.20 Selecting Colors

Use the following procedure to select the color scheme that best suits your store.

1. Go to the Update window for your store front.
Use the instructions in ["Editing Existing Store Fronts"](#).
2. Select **Colors** from the side navigation list menu.
The Colors window opens.
3. Select a color scheme.
4. Save your changes by clicking **Apply**.
5. Preview the Bin arrangement by clicking **Preview**.

C.3.21 Store Front Preview

The Store Front Preview shows all of your configuration choices, but not specific store data.

Use the following procedure to preview your store front.

1. Select the Store tab.
The Site window opens under the Set Up subtab.
2. Select the Store Front subtab.
The Store Front window opens.
3. Select the radio button of the store front that you want to preview.

4. Click **Preview**.

A modal window opens with a preview of the store front configurations.

C.3.22 Setting the Default Store Front

If you have defined more than one store front, you must set one as the default.

Use the following procedure to set a store front as the default:

1. Select the Store tab.

The Site window opens under the Set Up subtab.

2. Select the Store Front subtab.

The Store Front window opens.

3. Select the radio button of the store front that you want to set as the default.

4. Click **Activate**.

C.4 Catalog

From the Catalog tab, merchants can access and maintain store sections, items, and multimedia content.

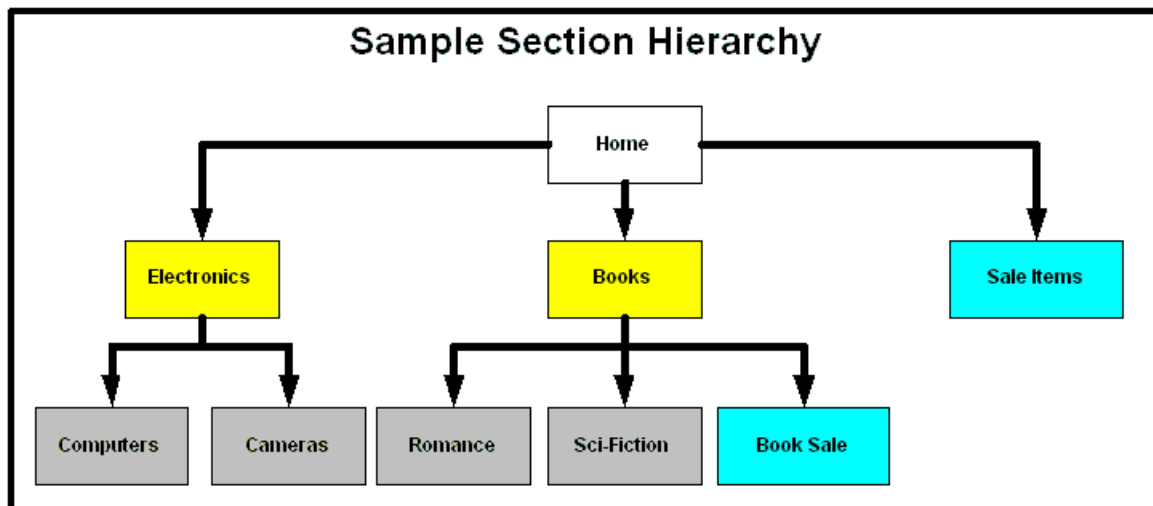
C.4.1 Sections

In this section you will learn how to add items to your store, and how to organize them into store sections. Before you configure the system, please review the material below about store sections and the best way to use them.

- The goal of most merchants is to enable customers to find what they want quickly, using the smallest number of browser clicks.
- If you do not have many products in your store, you may choose to list them all on your home page. Users will see them and be able to purchase with a few clicks.
- If you have a significant number of products in your store, listing them on the home page would be confusing to the customer. To address this problem, merchants can organize their items into sections.
- Stores with hundreds or thousands of products may need to create subsections to help their customers locate the desired products.

- Merchants may want to feature certain products. This is useful for items that are on sale or new to your store.

Merchants can meet the above objectives with store sections. Store sections define the hierarchy, and the way that the customer experiences and browses your store.



Sections: Sections are created to help organize the items in your store. A section may contain subsections or items, but not both.

Subsection: A subsection is a section within a section. In the figure, Computers and Cameras are subsections of Electronics, and Romance and Science Fiction are subsections of Books.

Featured Sections: Featured sections are used to highlight products. In the figure, Sale Items is a featured section. All items in that section will be shown on the home page. Book Sale is another featured section. All items in this section will be shown on the Books page.

Leaf Sections: Leaf sections contain items only and no subsections. In the figure, Computers, Cameras, Romance, and Science Fiction are all leaf sections.

Non Leaf Sections: Non leaf sections are the opposite of leaf sections—they contain subsections only. In the figure, Electronics and Books are non leaf sections.

Non Leaf Sections with Featured Sections: Non leaf sections with featured sections have at least one subsection that is featured. In the figure, Books is a non leaf section with a featured subsection called Book Sale.

Non Leaf Sections without Featured Sections: Non leaf sections without featured sections have no featured subsections. In the figure, Electronics is a non leaf section without any featured subsections.

Parent Section: The parent section is the section to which the subsection belongs. In the figure, Electronics is the parent section of Computers and Cameras.

C.4.2 Creating New Sections

Use the following procedure to create a new store section.

1. Select the Catalog tab.

The Sections window opens under the Sections subtab.

2. Click the Sections subtab.

The Sections window opens.

3. Click **Create**.

The Section Details window opens.

4. Fill in the form using the field descriptions below:

***Code:** A unique 20 alphanumeric field that identifies this section. This code is used in the item upload and download formats.

***Name:** A name for the store section that will be meaningful to your customers. For example, Electronics, Books, or Software.

Description: Use this to describe the section. This text will be automatically displayed on the section page, depending on the display style chosen.

Keywords: Used by the customer to search your store.

Parent: Select a navigational section or Home for the parent. Click the flashlight to search for the section you want.

Publish: Sections that are published can be viewed by customers. Unpublished sections are hidden from them. When you create a new section, you should keep it unpublished until it is complete, so that customers will not see work in progress.

Featured: Sections are the way to highlight products. Only leaf sections can be featured.

C.4.3 Editing Sections

Use the following procedure to edit a store section.

1. Select the Catalog tab.
The Catalog window opens under the Sections subtab.
2. Find the section you want to edit. You can find a section in two ways:
 - Search for Section Name or Code
 - Navigate the Section Hierarchy
3. **Search for Section Name or Code:** If you know the section's name or code, enter it into the search field and click **Go**.
4. **Navigate the Section Hierarchy:** If you don't know the section's name or code, navigate through the section hierarchy.
 - a. To navigate down a level, click the name of the section to which you want to navigate.
The Catalog Hierarchy window opens with the section you clicked as the root. Note the section hierarchy path that is displayed at the top.
 - b. If the section is a navigation section, then you can continue to navigate down or create a new section under it.
 - c. If the section is a leaf section, then the list of items in the section is displayed. You can also add items to the section.
 - d. To navigate up a level, click the name of the parent section.
5. When you are finished editing a section, click **Apply** to save changes.

C.4.4 Adding Items to Sections

Use the following procedure to add items to a leaf section.

1. Find the leaf section to which you want to add items.
Refer to "[Editing Sections](#)" for more details.
2. Click **Add Items to Section**.
The Add Item to Section window opens.

3. Search for the items that you want to add.
You can search for an item by name, code, or description. Searches are case sensitive.
4. Select the items that you want to add.
5. Click **Apply** to save the changes.

Note: You can only add items to leaf sections.

C.4.5 Publishing Sections

Use the following procedure to publish a section.

1. Select the Catalog tab.
The Sections window opens under the Sections subtab.
2. Select the Section you want to publish and click **Update**.
The Section Details window opens.
3. Select the Publish checkbox.
Save your change by clicking **Apply**.

C.4.6 Previewing Sections

Follow the steps below to preview your store sections with minimal impact to your customers.

1. Confirm that the section is unpublished.
To avoid showing incorrect information to your customers, unpublish your section until you are finished previewing it.
2. Preview your section.
Select the section you want to preview and click **Preview**. A modal window launches, enabling you to see what the unpublished section will look like. When you finish previewing, close the window.

C.4.7 Creating Items

Items are the products that you sell in your store.

Use the following procedure to create a new item.

1. Select the Catalog tab.

The Sections window opens under the Sections subtab.

2. Click the Item subtab.

The Item Summary window opens.

3. Click **Create Item**.

The Item Details window opens.

4. Fill in the form using the field descriptions below:

***Part Number:** This is a required field. It is a unique alphanumeric code that the merchant will use when uploading item information.

***Name:** This is also a required field. While it does not have to be unique, it should state clearly what the product is.

Description: Use this text field to describe the product to your customers. It will be displayed on product pages.

Unit of Measure: You can use Each and Lbs (pounds) as units of measure.

Walk-in User Price: Price must be entered in the same currency as the merchant's default currency.

Unit Weight: You can use EA (Each) and Lbs (pounds) as units of weight.

Publish: A published item can be seen by the customers. Unpublished items are not visible to customers.

Shippable: An item that is shippable will invoke the shipping calculations at time of purchase. Non shippable items will not.

Section Level Image: The image of the item displayed at the section page. Select a Section Multimedia image from your multimedia library. If the image you want does not exist, upload it to the library.

Detail Level Image: Displayed at the product page level. Select an Item Multimedia image from your multimedia library. If the image you want does not exist, upload it to the library.

Sections Published: Click **Add Item to Leaf Sections** to select all store sections where you want this item to appear. When the Add Item to Leaf Sections page opens, select the checkboxes for the desired sections and click **Apply**. You can only place items in leaf sections.

5. Click **Apply** to save your changes.

C.4.7.1 Deleting Items

Items cannot be deleted from your store. To prevent items from appearing, unpublish them.

C.4.8 Searching for Items

To search for items, you can use the view filter, simple search, or advanced search. For all searches, if the result set is greater than 10, click **Next** to see the entire list.

C.4.8.1 View Filter

The view filter enables you to list all items, published items, or unpublished items. Select the type of filter you want, then click **Go**. The list will automatically refresh.

C.4.8.2 Simple Search

Simple search enables you to search for items by their part number, name, or type. This search is case sensitive.

C.4.8.3 Advanced Search

Advanced search enables you to search for items by an item creation date range, part number, and item name. After filling in the search parameters, click **Go**. The search is case sensitive.

C.4.9 Editing Items

Use the following procedure to edit an item.

1. Select the Catalog tab.
The Sections window opens under the Sections subtab.
2. Click the Item subtab.
The Item Summary window opens.
3. Find the item you want to edit.

Refer to "[Searching for Items](#)" for information on how to find an item.

4. Select the item that you want to edit and click **Update**.

The Item Details Page for the item opens. In this window, you can make the necessary changes.

5. Click **Apply** to save the changes.

The Item Detail page refreshes. Confirm that there are no errors.

C.4.10 Adding Sections to Items

Use the following procedure to add sections to an item.

1. Open the Detail Item window for the item.

Refer to "[Editing Items](#)" for more details.

2. Click **Add Item to Leaf Section**.

The Add Item to Leaf Section window opens.

3. Search for the leaf sections to which you want to add the item.

You can search for a section by section name or code.

4. Select the sections that you want.

5. Click **Apply** to save the changes.

The Item Detail page will be returned with the new sections. Confirm that there are no errors.

Note: You can only add items to leaf sections.

C.4.11 Downloading Items

Downloading items allows merchants to synchronize their online inventory with a separate system.

Use the following procedure to download items.

1. Use the view filter, simple search, or advanced search to list the items you want to download.
2. In the Items window, click **Download**.

Download will automatically download all items in your inventory.

3. Select a file type.

The choices are a Comma Separated Values (CSV) file or an Extended Markup Language (.XML) file. See "[Item File Format](#)" for more information.

4. Select **Generate Compressed File** if you want to download a file that is compressed with WinZip. This is helpful if you expect a large file.
5. Click **Download**.

The Download Confirmation window opens, showing the job number.

6. Click **Check Download Status**.

The Background Job window opens.

7. Click **Refresh** to update the job status.

You must wait for the job status to be Completed and the status to be Normal before viewing.

8. Select your completed job and click **View Details**.

The Background Status Details window opens.

9. Click **Download** to download the file.

To get the format of the item download file, go to "[Item File Format](#)".

C.4.12 Uploading Items

For merchants with many products, uploading inventory changes is an effective way of maintaining inventory. The upload method may be used to add new items or to update existing items.

You can only upload items that are on the price list specified in the profile option IBE: EOS Default Price List.

If you are uploading items in CSV format, and an item is associated with more than one section, you must enter multiple rows for the same item in the CSV file. The number of item rows in the CSV file must equal the number of sections with which the item is associated. All item information is obtained from the first row, except for the part number and section information, which are read from the subsequent rows.

Follow the steps below to upload inventory information.

1. Prepare item files.

This file preparation process will vary based on the format chosen (CSV or XML). Go to "[Item File Format](#)" for more information.

2. Click the Catalog tab and the Upload subtab.
3. Click **Start Upload** in the lower right of the screen.
4. Fill in the upload parameters and click **Upload**. Details of the parameters are explained below.

Filename: Click **Browse** to select the file from your local drive.

Error handling options: There are two options for handling errors during the upload. You can choose to stop the upload when a specified number of errors occurs, or upload as much as possible irrespective of the number of errors.

5. Check upload results.

The Background Status Jobs box, found in the upper right side of your Upload page, shows how many items your store has in the queue to be processed, how many jobs completed successfully, and how many completed with errors.

The processing time depends on the size of the file and the traffic at the site. If your upload job stays on the queue for longer than an hour you may want to contact support.

If your job completes successfully, check the Background Job Details page for job details and for any errors and warnings that occurred during processing. Click the number in the status box, then select the job that you want to investigate and click **View Details**.

If your job completes with errors, the record in the line number was not processed at all. Warnings mean the record was processed but there was an error that you should review. Depending on the specific errors, you may need to repair the file and reprocess it.

C.4.13 Item File Format

A Comma Separated Value file (CSV), must have the list of attribute names first, followed by the rows of data.

For both CSV and XML files you must include the headers of all the fields, even if you are not supplying data for each of them.

The following table lists each field in an item file for upload or download.

Attribute	Required	Type	Description
Part Number	Yes	Char (40)	The item number. If the item number is new, then a new item will be created. If the item number already exists, then the item will be updated.
Name	Yes	Char (240)	Name of item
Description	No	Char (240)	Description of item
Language	Yes	Char (3)	Code for the language in which the item is being uploaded. See " Language Mappings " to get codes.
Item Weight	No	Number	Item weight in pounds
Item UOM	No	Char (3)	Unit of measure—currently only LBs (pounds) and EA (each) are supported.
Publish	No	Char (1)	The default is Y (yes). If you want to unpublish an item, set this field to N.
Shippable	No	Char (1)	The default is Y (yes). If you want to make this a non shippable item (no freight charges applicable), set this field to N.
Price list name	Yes, if including a price	Char(240)	The name of the price list that you want to update. The price list must already exist.
Currency	Yes, if including a price	Char(30)	The currency in which the prices are displayed. See " Currency Codes " for a list of codes. Store must already be configured to support currency.
Price	No	Number	The price of the item
Section Level image	No	Char (40)	The name of the section level image as it appears in the multimedia library
Detail level image	No	Char (40)	The name of the item image as it appears in the multimedia library
Section Code	No	Char (240)	The section code where you want the item published. To place an item in multiple sections, create a new row for that item for each section. The section name must already exist. New sections cannot be created during item upload.

C.4.13.1 Example of an Item CSV File

Part Number,Name,Description,Language,Item Type,Item Weight,Weight UOM,Publish,Shippable,UOM,Walk-in User Price,Currency,Price List Name,Section Level Image,Detail Level Image,Section Code

PMF2000,Phoebe 2000 Doll,Favorite Doll ideal for ages 2-4,US,Toy-Tax,,Lbs,Y,Y,EA,19.95,USD,Northern American Prices,PMF2000 section,PMF2000 detailed,Toy

PMF2001,Phoebe 2001 Doll,New improved over the Phoebe 2000 Doll,US,Toy-Tax,,Lbs,Y,Y,EA,29.95,USD,Northern American Prices,PMF2000 section,PMF2000 detailed,Toy

C.4.13.2 Example of an Item XML File

```
<?xml version="1.0" ?>
  <CATALOG items_count="2" date="03-AUG-01">
    <ITEM item_id="30">
      <PART_NUMBER>PMF2000</PART_NUMBER>
      <NAME>Phoebe 2000 Doll</NAME>
      <DESCRIPTION>Favorite Doll ideal for ages 2-4</DESCRIPTION>
      <LANGUAGE>US</LANGUAGE>
      <ITEM_TYPE>Toy-Tax</ITEM_TYPE>
      <ITEM_WEIGHT />
      <WEIGHT_UOM>Lbs</WEIGHT_UOM>
      <PUBLISH>PUBLISHED</PUBLISH>
      <SHIPPABLE>Y</SHIPPABLE>
      <UOM>EA</UOM>
      <PRICE />
      <CURRENCY />
      <PRICE_LIST_NAME />
      <SECTION_LEVEL_IMAGE />
      <DETAIL_LEVEL_IMAGE />
      <SECTIONS>
        <SECTION_CODE>Dolls</SECTION_CODE>
      </SECTIONS>
    </ITEM>
    <ITEM item_id="31">
      <PART_NUMBER>PMF2001</PART_NUMBER>
      <NAME>Phoebe 2001 Doll</NAME>
      <DESCRIPTION>New improved over the Phoebe 2000 Doll</DESCRIPTION>
      <LANGUAGE>US</LANGUAGE>
      <ITEM_TYPE>Toy-Tax</ITEM_TYPE>
      <ITEM_WEIGHT />
      <WEIGHT_UOM>Lbs</WEIGHT_UOM>
```

```

<PUBLISH>PUBLISHED</PUBLISH>
<SHIPPABLE>Y</SHIPPABLE>
<UOM>EA</UOM>
<PRICE />
<CURRENCY />
<PRICE_LIST_NAME />
<SECTION_LEVEL_IMAGE />
<DETAIL_LEVEL_IMAGE />
<SECTIONS>
  <SECTION_CODE>Dolls</SECTION_CODE>
</SECTIONS>
</ITEM>
</CATALOG>

```

C.4.14 Multimedia

Oracle Store provides a central repository for all merchant multimedia content.

Use the following procedure to upload a new image.

1. Select the Catalog tab.

The Items window opens under the Items subtab.

2. Select the Multimedia subtab.

The Multimedia window opens.

3. Click **Add**.

The Add Multimedia File window opens.

4. Fill in the form using the field descriptions below:

Display Name: The alternate name of the image.

***Display Class:** Pick the type of multimedia file you are uploading.

- Item: Product images found on the product page. Recommended size is 125 x 125 pixels.
- Section: Product images found on the section page. Recommended size is 80 x 80 pixels.
- Logo: Store logo found in the upper left corner of every store page. Recommended size is 350 x 110 pixels.
- Other: Any type of image can be uploaded. However, the store templates only support a maximum of 350 x 350 pixels.

***Language:** Select the file language. If it is global, select **All**.

Filename: Click **Browse** to locate the file from your local file system.

5. Click **Apply** to save changes.

Use the following procedure to upload several images at one time.

1. Prepare a compressed zipped file.

Use WinZip to compress the images that you want to upload to the Multimedia Library. All images should be of the same type.

2. Add the WinZip file the same way you would add a single multimedia file. See the procedure above.

After uploading the compressed file, the images will be decompressed and added to the multimedia library. The Display Name for each file will default to the image file name. The Display Class and the Language will default to the values selected when uploading the compressed file.

C.5 Pricing

Merchants can have multiple price lists for the items, in different currencies. Customers will see the prices from the price list enabled for their currency.

C.5.1 Enabling Price Lists

Use the following procedure to enable a price list.

1. Select the Pricing tab.

The Price List window opens under the Price List subtab.

2. Select the price list to be enabled.
3. Click **Enable**.

C.5.2 Creating New Price Lists

By default your store will sell items at the price you have set at the item level (see "[Creating Items](#)"). You must create a new price list for each currency that you support.

Use the following procedure to create a new price list.

1. Select the Pricing tab.

The Price List window opens under the Price List subtab.

2. Click **Create Price List**.

The Create Price List window opens.

3. Fill in the form using the field descriptions below:

***List Name:** This is a name for merchants only.

Description: A brief description to explain the purpose of the list.

***Currency:** Select the currency this list is for.

***Status:** Indicates if the price list is enabled or disabled. You should keep a new list disabled until it is finished so that customers do not see inaccurate prices.

C.5.3 Editing Price Lists

Use the following procedure to edit a price list.

1. In the Pricing tab, choose the Price List subtab.

2. Select the price list that you want to edit and click **Update**.

The Price List Details window opens.

3. You can now edit the price list as necessary. See "[Creating New Price Lists](#)" and "[Adding New Products to Price Lists](#)" for instructions.

4. Click **Apply** to save your changes.

C.5.4 Adding New Products to Price Lists

Use the following procedure to add new items to a price list.

1. Go to the Price List Details window for the price list you want to update.

This window will automatically open when creating a new price list. For existing lists, select the price list you want to change and click **Update**.

2. Click **Add Item**.

The Add Items window opens.

3. Search for the item that you want to add by the part number or item name.

A list of matches will appear.

4. Select the items that you want to add, and supply prices for them.

5. Save changes by clicking **Apply**.

C.5.4.1 Removing Products from Price Lists

Use the following procedure to remove items from price lists.

1. In the Price List Details window, search for the item that you want to remove by the part number or item name.
2. Select the item's checkbox.
3. Click **Remove**.

C.5.4.2 Changing Product Prices

Use the following procedure to change product prices in price lists.

1. In the Price List Details window, search for the item that you want to update by the part number or item name.
2. Enter the new price to replace the old price.
3. Click **Apply** to save the changes.

C.5.5 Downloading Prices

Use the following procedure to download a price list.

1. From the Price List Summary window, select the price list you want to download.
2. Click **Download**.

The Download Parameters window opens.

3. Select the format type that you want.
See "[Price List File Formats](#)" for more information.

4. Click **Start Download**.

The Download Results page opens. It will list a job number for your download request.

5. Click **Check Download Status**.

A list of all jobs will be presented with their status. Click **Reload** to refresh the page.

6. After your download job completes, select it and click **View Details**.

The Background Job window opens.

7. Click **Download** to download the file to your local storage drive.

C.5.6 Uploading Prices

Use the following procedure to upload a price list.

1. Prepare price files.

This file preparation process will vary based on the format chosen (CSV vs. XML). For more information, go to "[Price List File Formats](#)".

2. Select the Pricing tab.

The Pricing List window opens.

3. Select the Upload subtab.

The Upload Introduction window opens.

4. Click **Start Upload** in the lower right side of the screen.

5. Fill in the upload parameters and click **Upload**. Details of the parameters are explained below.

Filename: Click **Browse** to select the file from your local drive.

Error handling options: There are two options for handling errors that might occur during the upload. You can choose to stop the upload if a certain number of errors occur, or you can choose to upload as much as possible regardless of how many errors may occur.

6. Check upload results.

The Background Status Jobs box, found in the upper right side of your Upload page, shows how many items your store has on the queue to be processed, how many jobs completed successfully, and how many completed with errors.

The time it takes to get your job processed depends on the size of the file and the traffic at the site. If your upload job stays on the queue for longer than an hour, you may want to contact support.

If your job completes successfully, there were no errors or warnings.

If your job completes with errors, then you should drill into the details by clicking on the number in the status box. Select the job that you want to investigate and click **View Details**.

The Background Job Details page shows the job details and all errors and warnings that occurred during processing.

Errors mean the record in the line number was not processed at all. Warnings mean the record was processed but there was some error that you should look into. Depending on the errors, you may need to repair the file and reprocess it.

Reprocessed files will not create duplicate records.

C.5.7 Price List File Formats

For both CSV and XML files you must include the headers of all the fields, even if you are not supplying data for each of them.

The following table lists all of the fields that can be uploaded in a price list upload.

Field Name	Required	Values	Field Description
EFFECTIVE_DATE	No	Data Type = Date MM-DD-YYYY	Header information. The start date of the effective period for the price list.
EXPIRATION_DATE	No	Data Type = Date MM-DD-YYYY	Header information. The end date of the effective period for the price list.
PRICE_LIST_NAME	Yes	No default value Data-type: Varchar2(240)	Header information. The price list's code.
CURRENCY	Yes	No default value Data-type: Varchar2(30)	Header information. Currency code associated to item prices in this price list.
DESCRIPTION	No	No default value Data-type: Varchar2(2000)	Header information. Price list description.
LANGUAGE	Yes	Defaults to US Data-type: Varchar2(4)	Header information. See "Language Mappings" .
PRICE_LIST_TYPE	Yes	Data-type: Varchar2(30) Default Value = PRL	Header information. Must be set to PRL for price list.

Field Name	Required	Values	Field Description
ACTIVE	No	Default = Y Data Type = Varchar2(1) Available Values Y/N	Header information. Indicates if the list is active or not.
PART NUMBER	Yes	No default value Data-type: Varchar2 (40)	Line information. Part number of the item.
UOM_CODE	No	Default = Primary UOM Code Data-type: Varchar2(3)	Line information.
PRICE	Yes	No default value Data-type: Number	Line information. Item's price. Negative and null values are not allowed, but the price can be zero. If the merchant does not insert a correct value in the price, the line is rejected.
LINE_TYPE	Yes	Data-type: Varchar2(30) Default = PLL	Line information. The only valid value is PLL.
PRICE_TYPE	Yes	Data Type: Char(30) Default = UNIT_PRICE	Line information. The only valid value is UNIT_PRICE.
PRODUCT_PRECEDENCE	No	Default Value = Null Data type = Number	Line information. Reserved for future use.

C.5.7.1 Example of a Price List CSV File

EFFECTIVE_DATE, EXPIRATION_DATE, PRICE_LIST_NAME, CURRENCY, DESCRIPTION, LANGUAGE, PRICE_LIST_TYPE, STATUS

12-JUL-01,,Default Price List,USD,Default Price List,US,PRL,Y

LINE_TYPE,UOM_CODE,PRICE_TYPE,PRICE,PART_NUMBER,PRODUCT_PRECEDENCE

```

PLL,,UNIT_PRICE,12.25,ITLFD-001,
PLL,,UNIT_PRICE,190,eostest-001,
PLL,,UNIT_PRICE,1000000,ITLCAR-001,

```

C.5.7.2 Example of a Price List XML File

```

<?xml version = "1.0" ?>
<SYNC_PRICELIST_001>
  <PRICELIST>
    <CSV_REFERENCE_LINE>1</CSV_REFERENCE_LINE>
    <EFFECTIVE_DATE></EFFECTIVE_DATE>
    <EXPIRATION_DATE></EXPIRATION_DATE>
    <PRICE_LIST_NAME>Default Price List</PRICE_LIST_NAME>
    <CURRENCY>USD</CURRENCY>
    <DESCRIPTION>Default Price List</DESCRIPTION>
    <LANGUAGE>US</LANGUAGE>
    <PRICE_LIST_TYPE>PRL</PRICE_LIST_TYPE>
    <STATUS>Y</STATUS>
    <PRCLSTLINE>
      <CSV_REFERENCE_LINE>2</CSV_REFERENCE_LINE>
      <LINE_TYPE>PLL</LINE_TYPE>
      <UOM_CODE></UOM_CODE>
      <PRICE_TYPE>UNIT_PRICE</PRICE_TYPE>
      <PRICE>12.25</PRICE>
      <PRODUCT_PRECEDENCE></PRODUCT_PRECEDENCE>
      <PART_NUMBER>ITLFD-001</PART_NUMBER>
    </PRCLSTLINE>
    <PRCLSTLINE>
      <CSV_REFERENCE_LINE>3</CSV_REFERENCE_LINE>
      <LINE_TYPE>PLL</LINE_TYPE>
      <UOM_CODE></UOM_CODE>
      <PRICE_TYPE>UNIT_PRICE</PRICE_TYPE>
      <PRICE>190</PRICE>
      <PRODUCT_PRECEDENCE></PRODUCT_PRECEDENCE>
      <PART_NUMBER>eostest-001</PART_NUMBER>
    </PRCLSTLINE>
    <PRCLSTLINE>
      <CSV_REFERENCE_LINE>4</CSV_REFERENCE_LINE>
      <LINE_TYPE>PLL</LINE_TYPE>
      <UOM_CODE></UOM_CODE>
      <PRICE_TYPE>UNIT_PRICE</PRICE_TYPE>
      <PRICE>1000000</PRICE>
      <PRODUCT_PRECEDENCE></PRODUCT_PRECEDENCE>
      <PART_NUMBER>ITLCAR-001</PART_NUMBER>
    </PRCLSTLINE>
  </PRICELIST>
</SYNC_PRICELIST_001>

```

```
</PRICELIST>  
</SYNC_PRICELIST_001>
```

C.5.8 Discount

Discounts enable merchants to sell items at a special price or a reduced price, to some or all of their customers, for a particular time period. When multiple discounts apply, the customer is offered the best price.

Use the following procedure to create a discount.

1. Select the Pricing tab.

The Price List window opens under the Price list subtab.

2. Select the Discount subtab.

The Discount window opens.

3. Click **Create Discount**.

The Create Discount window opens.

4. Fill in the form using the field descriptions below:

***Code:** Every discount needs to have a code to identify it uniquely. This code can be alphanumeric with 240 characters.

***Discount Name:** The name of the discount will be seen by merchants only.

***Currency:** Discounts are applied to only one currency. If you are supporting multiple currencies and want to have global discounts, then you must define a discount for each.

***Discount Method:** Discounts can be applied in two ways: percentage or price override. A percentage discount enables the merchant to enter a percentage off of a product price, while a price override enables the merchant to enter a new price for the item regardless of original price.

Effective From Date: The date you want the discount to start. Effective dates are inclusive.

Effective To Date: The date you want the discount to end. Effective dates are inclusive.

Status: Enabled means the discount is active or will be active when the effective dates begin. Disabled means the discount is not active. It is recommended that status remains disabled until you finish defining the discount.

Ask For Promotion Code: Check this box if you want to secure the discount with a promotion code. In order for customers to take advantage of the discount, they must supply the discount code.

Discount Method: The type of discount. See "[Percentage Discount](#)" and "[Price Override](#)" for more information.

5. Save changes by clicking **Apply**.

Depending on the type of discount method, a different window will open.

C.5.8.1 Percentage Discount

Percentage discount enables you to enter a discount percentage based on the customer's total order amount. Below are some examples of this type of discount.

- Give users 10% discount on all products.
- Give users 10% off certain products.
- Give users 10% off all purchases over \$100.
- Give users 10% off certain products if they buy over a certain amount.
- Give user 10% off all purchases under \$100 and 15% off purchases over \$100.

Use the following procedure to define the percentage discount.

1. Fill in the Discount Rules table.

Each line of the table requires a "Amount From" and an "Amount To" in the currency that the discount is for, and the percentage of the discount.

2. Save the rules table by clicking **Apply**.

The following table is an example of discount rules.

From Amt	To Amt	Percentage	Note
0	100	10	This line will give 10% discount for purchases less than or equal to 100.
100.01	200	15	This line will give 15% discount for purchases greater than \$100 and less than or equal to \$200
200.01	99999999	20	This line will give 20 discount for purchases greater than \$200

C.5.8.2 Price Override

For price override discounts, you must enter the new prices for the items via the discount qualifiers for items. See "[Adding Eligible Items to Discounts](#)" for details.

C.5.9 Searching for Discounts

To search for discounts, you can use the view filter, simple search, or advanced search. For all searches, if the result set is greater than the display limit, click **Next** to see the entire list.

C.5.9.1 View Filter

The view filter enables you to list all discounts, active discounts, or inactive discounts. Select the type of filter you want, then click **Go**. The list will automatically refresh.

C.5.9.2 Simple Search

Simple search enables you to search for discounts by their name or code. This search is case sensitive.

C.5.9.3 Advanced Search

Advanced search enables you to search for discounts by name, code, currency, effective dates, status, qualified customers, qualified items, and whether the discounts are ask-for promotions. After filling in the search parameters, click **Go**. The search is case sensitive.

C.5.10 Editing Discounts

Use the following procedure to edit discounts.

1. In the Pricing tab, choose the Discount subtab.
2. Select the discount that you want to edit.
3. Click **Update**.

The Discount Details window opens.

4. Edit the discount as necessary. See "[Discount](#)" for details.
5. Click **Apply** to save your changes.

C.5.11 Adding Eligible Customers to Discounts

If the discount is applicable for all customers, then skip this procedure.

Use the following procedure to choose the eligible customers for a discount.

1. From the Discount Details window, select **Qualifiers** from the side navigation list menu.

The menu expands with submenu items.

2. Select **Customers**.

The Customer window opens.

3. Click **Add Customer**.

4. Search for the customer by entering the name and clicking **Go**.

A list of customers that match your search query appears.

5. Select the customers that you want to add.

6. Save your selection by clicking **Apply**.

C.5.12 Adding Eligible Items to Discounts

If the discount is for all items in your inventory, then skip this procedure.

Use the following procedure to choose the eligible items for a discount.

1. From the Discount Details window, select **Qualifiers** from the side navigation list menu.

The menu expands with submenu items.

2. Select **Items**.

The Items window opens.

3. Click **Add Item**.

4. Search for the item by entering the name or part number and clicking **Go**.

A list of items that match your search query appears.

5. Select the items that you want to add.

6. Save your selection by clicking **Apply**.

Adding Items to a Price Override Discount

Make sure that you supply a discount price for the items you are selecting. The discount price must be in the same currency as the discount.

C.5.13 Enabling Discounts

Use the following procedure to enable a discount.

1. Select the Pricing tab.

The Price List window opens under the Price list subtab.

2. Select the Discount subtab.

The Discount window opens.

3. Find and select the discount to be enabled.

4. Click **Enable**.

Note: In order for a discount to be effective in the store, it must be enabled and within the effective date range of the discount.

C.5.13.1 Disabling Discounts

Use the following procedure to disable a discount.

1. Select the Pricing tab.

The Price List window opens under the Price List subtab.

2. Select the Discount subtab.

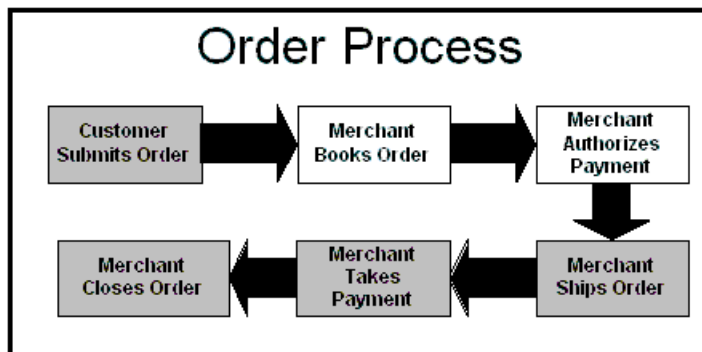
The Discount window opens.

3. Find and select the discount to be disabled.

4. Click **Disable**.

C.6 Orders

The process flow diagram below illustrates how orders should be processed.



C.6.1 Searching for Orders

To search for orders, use a simple or advanced search. If result sets are larger than your preferred limit, click **Next** to view them.

C.6.1.1 Simple Search

Simple search enables you to search for orders by the date the order was placed. Enter the date range and click **Go**.

C.6.1.2 Advanced Search

Advanced search enables you to search for orders by the date the order was placed, the order number, a part number within the order, user name, first name, or last name of the customer, or the city, state, and country of the customer billing address.

The search parameters are case sensitive. After entering the search parameters, click **Go**.

C.6.2 Downloading Orders

Use the following procedure to download orders.

1. Use the simple or advanced search to list the orders you want to download.
2. In the Orders Summary window, click **Download**.

All orders in the result set will be downloaded. You do not need to select all orders from the result set.

3. Select a file type.

The choices are a Comma Delimited (CSV) file or an Extended Markup Language (XML) file. For more information, go to "[Order File Formats](#)".

4. Select Generate Compressed File if you want to download a file that is compressed with WinZip. This is helpful for large files.
5. Click **Download**.

The Download Confirmation window opens, showing the job number.

6. Click **Check Download Status**.

The Background Job window opens.

7. Click **Refresh** to update the job status.

You must wait for the job status to be Completed and the status to be Normal before viewing.

8. Select your completed job and click **View Details**.

The Background Status Details window opens.

9. Click **Download** to download the file to your local storage system.

C.6.3 Retrieving Orders

After a customer places an order, the order is stored in the system with a Booked status.

Use the following procedure to retrieve orders:

1. Select the Orders tab.
The Order Search window opens under the Summary subtab.
2. Enter the date range and click **Go**.

You may also choose to use the advanced search by clicking **Advanced**. This allows you to search for orders using more complex parameters.

The result set contains a list of orders that match your criteria. If there are more than ten, click **Next** to view them.

Click the order number to view details.

3. Select the orders of interest to you.

To select all of the orders, click **Select All**.

4. If you want the selected orders e-mailed to you, click **E-mail Orders**.

Orders are automatically e-mailed to the merchant e-mail address as defined in your profile.

C.6.4 Order File Formats

Orders can be downloaded in Comma Separated Value files (CSV) or Extended Markup Language (XML) formats.

The table below shows all the fields in an order download.

Field	Data Type	Description
Language	Varchar (3)	Oracle language codes. See " Language Mappings ".
Store Name	Char(30)	Name of store
Order Header Id	Number	iStore primary key that uniquely identifies an order
Order Number	Number	Order number. This number is not guaranteed to be unique for all orders.
Order Status Code	Char(30)	CLOSED, CANCELLED, or BOOKED
Ship Date	DD-MON-YYYY	Date the order was shipped, e.g., 04-Oct-2001. Required to close an order.
Ship Method	Char (240)	The shipping method chosen by the customer. Required for closing orders. If shipping method is different than the customer's initial selection, confirm that the shipping method exists, and that it is spelled correctly with proper capitalization.
Tracking Number	Char (30)	Number the customer should use to track order
Invoice Number	Number	Invoice number
Comments	Char (30)	Comments

Field	Data Type	Description
Order Status	Char (30)	The status of the order when downloaded. Possible values are BOOKED, CLOSED, or CANCELLED.
PO Number	Char (30)	PO number used when customer selected PO as a payment method
Date Created	Date mm/dd/yyyy	Order entry date
Last Update	Date mm/dd/yyyy	Date of last order update
User Name	Varchar (10)	Customer user name
Currency	Varchar (3)	Oracle currency codes. See " Currency Codes " for more information.
Bill to First Name	Varchar (30)	Billing information
Bill To Last Name	Varchar (30)	Billing information
Bill To Email	Varchar (30)	Billing information
Bill To Address Line 1	Varchar (30)	Billing information
Bill To Address Line 2	Varchar (30)	Billing information
Bill To Address Line 3	Varchar (30)	Billing information
Bill To Address Line 4	Varchar (30)	Billing information
Bill To City	Varchar (30)	Billing information
Bill To County	Varchar (30)	Billing information
Bill To State	Varchar (2)	Billing information
Bill To Postal Code	Varchar (10)	Billing information
Bill To Country	Varchar (2)	Billing information
Ship to First Name	Varchar (30)	Shipping information
Ship To Last Name	Varchar (30)	Shipping information
Ship To Email	Varchar (30)	Shipping information
Ship To Address Line 1	Varchar (30)	Shipping information

Field	Data Type	Description
Ship To Address Line 2	Varchar (30)	Shipping information
Ship To Address Line 3	Varchar (30)	Shipping information
Ship To Address Line 4	Varchar (30)	Shipping information
Ship To City	Varchar (30)	Shipping information
Ship To County	Varchar (30)	Shipping information
Ship To State	Varchar (2)	Shipping information
Ship To Postal Code	Varchar (10)	Shipping information
Ship To Country	Varchar (2)	Shipping information
Shipping Charge	Number	Shipping charge as calculated by the store
Tax Total	Number	Tax charge as calculated by the store
Sub Total	Number	Order value without shipping or tax charges
Order Total	Number	Order value with shipping and tax charges
Payment Type	Varchar(30)	Payment method selected by the customer
Card Type	Varchar(30)	The credit card type, e.g., Visa, American Express
Card Number	Varchar(50)	The credit card number. Only the last 4 digits are used. The rest are screened out for security reasons.
Card Expiration	Date mm/dd/yyyy	Credit card expiration date

C.6.4.1 Example of an Order CSV File

```

HEADER,Language,Store Name,Order Header ID,Order Number,Order
Status Code,Ship Date,Ship Method,Tracking Number,Invoice Number,
Comments,Order Status,PO Number,Date Created,
Last Update,User Name,Currency,
Bill to First Name,Bill To Last Name,Bill To Email,
Bill To Address Line 1,Bill To Address Line 2,
Bill To Address Line 3,Bill To Address Line 4,
Bill To City,Bill To County,Bill To State,
Bill To Postal Code,Bill To Country,
Ship to First Name,Ship To Last Name,Ship To Email,

```

Ship To Address Line 1,Ship To Address Line 2,
 Ship To Address Line 3,Ship To Address Line 4,
 Ship To City,Ship To County,Ship To State,Ship To Postal Code,
 Ship To Country,
 Shipping Charge,Tax Total,Sub Total,Order Total,
 Payment Type,Card Type,Card Number,Card Expiration
 ,
 US,E-Commerce Online Services - Development's ,1050,25,CANCELLED,,
 UPS - GROUND,,,,Entered,,27-Jul-01,27-Jul-01,,,,,979 Ponderosa Ave.
 #C,,,,Sunnyvale,US,CA,94086,,,,,,,,,,,,,3,0.51,6.125,,,,,

 LINE,Line Number,Part Number,Product Name,Unit of
 Measure,Quantity,Price,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
 ,1,ITLFD-001,TEST,EA,1,6.125,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

C.6.4.2 Example of an Order XML File

```

<?xml version = "1.0"?>
<SALESORDERS orders_count="9" date="15-AUG-01">
  <LANGUAGE>US</LANGUAGE>
  <STORENAME>E-Commerce Online Services - Development</STORENAME>
  <ORDER>
    <SOHEADER>
      <ORDERHEADERID>1051</ORDERHEADERID>
      <ORDERNUMBER>26</ORDERNUMBER>
      <ORDERSTATUSCODE>CLOSED</ORDERSTATUSCODE>
      <SHIPDATE>31-AUG-2001 </SHIPDATE>
      <SHIPMETHOD>UPS-GROUND</SHIPMETHOD>
      <TRACKINGNUMBER/>
      <INVOICENUMBER/>
      <COMMENTS/>
      <ORDERSTATUS>Entered</ORDERSTATUS>
      <PONUMBER/>
      <DATECREATED>27-JUL-01</DATECREATED>
      <LASTUPDATE>27-JUL-01</LASTUPDATE>
      <USER_NAME>SPECIALCHAR</USER_NAME>
      <CURRENCY>USD</CURRENCY>
      <BILLTOCONTACT>
        <BILLTOFIRSTNAME/>
        <BILLTOLASTNAME/>
        <BILLTOEMAIL/>
      </BILLTOCONTACT>
      <BILLTOADDRESS>
        <BILLTOADDRLINE1>458 Fernando Ave.</BILLTOADDRLINE1>
        <BILLTOADDRLINE2/>

```

```
<BILLTOADDRLINE3 />
<BILLTOADDRLINE4 />
<BILLTOCITY>Palo Alto</BILLTOCITY>
<BILLTOCOUNTY>US</BILLTOCOUNTY>
<BILLTOSTATE>CA</BILLTOSTATE>
<BILLTOPOSTALCODE>94306</BILLTOPOSTALCODE>
<BILLTOCOUNTRY>US</BILLTOCOUNTRY>
</BILLTOADDRESS>
<SHIPTOCONTACT>
  <FIRSTNAME />
  <LASTNAME />
  <EMAIL />
</SHIPTOCONTACT>
<SHIPTOADDRESS>
  <BILLTOADDRLINE1>458 Fernando Ave.</BILLTOADDRLINE1>
  <BILLTOADDRLINE2 />
  <BILLTOADDRLINE3 />
  <BILLTOADDRLINE4 />
  <BILLTOCITY>Palo Alto</BILLTOCITY>
  <BILLTOCOUNTY>US</BILLTOCOUNTY>
  <BILLTOSTATE>CA</BILLTOSTATE>
  <BILLTOPOSTALCODE>94306</BILLTOPOSTALCODE>
  <BILLTOCOUNTRY>US</BILLTOCOUNTRY>
</SHIPTOADDRESS>
<CHARGES>
  <SHIPPINGCHARGE>3</SHIPPINGCHARGE>
  <TAXTOTAL>.51</TAXTOTAL>
  <SUBTOTAL>6.125</SUBTOTAL>
  <ORDER_TOTAL>9.635</ORDER_TOTAL>
</CHARGES>
<PAYMENT>
  <PAYMENTTYPE />
  <CARDTYPE />
  <CARDNUMBER />
  <CARDEXPIRATION />
</PAYMENT>
</SOHEADER>
<SOLINES>
  <LINE>
    <LINE_NUMBER>1</LINE_NUMBER>
    <PRODUCT_NUMBER>ITLFD-001</PRODUCT_NUMBER>
    <PRODUCT_NAME>Pizza Margherita</PRODUCT_NAME>
    <ORDER_QUANTITY>1</ORDER_QUANTITY>
    <ORDER_QUANTITY_UOM>EA</ORDER_QUANTITY_UOM>
    <PRICE>6.125</PRICE>
```

```

        </LINE>
      </SOLINES>
    </ORDER>
  </SALESORDERS>

```

C.7 Currency and Language

This section lists the codes used for currency and languages.

C.7.1 Currency Codes

The following table lists currency codes and their corresponding currency names.

Currency Code	Currency Name
ADP	Andorran Peseta
AED	UAE Dirham
AFA	Afghani
ALL	Lek
AMD	Armenian Dram
ANG	Netherlands Antillian Guilder
AOK	Kwanza
AON	New Kwanza
ARA	Austral
ARS	Argentine Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijani Manat
BBD	Barbados Dollar
BDT	Taka
BEF	Belgian Franc
BGL	Lev

Currency Code	Currency Name
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar (Bermuda Dollar)
BND	Brunei Dollar
BOB	Boliviano
BOV	Mvdol
BRC	Cruzado
BRL	Brazilian Real
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	Kyat (Obsolete)
BWP	Pula
BYB	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CHF	Swiss Franc
CLF	Unidades de formento
CLP	Chilean Peso
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc

Currency Code	Currency Name
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor Constante (UVC)
EEK	Kroon
EGP	Egyptian Pound
ESB	Convertible Peseta Accounts
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	Euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falkland Islands Pound
FRF	French Franc
GBP	Pound Sterling
GEK	Georgian Coupon
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNF	Guinea Franc
GRD	Drachma
GTQ	Quetzal
GWP	Guinea-Bissau Peso
GYP	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Croatian Dinar

Currency Code	Currency Name
HRK	Croatian kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILS	Shekel
INR	Indian Rupee
IQD	Iraqi Dinar
IRR	Iranian Rial
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands Dollar
KZT	Tenge
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti

Currency Code	Currency Name
LTL	Lithuanian Litas
LUC	Convertible Franc
LUF	Luxembourg Franc
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MUR	Mauritius Rupee
MVR	Rufiyaa
MWK	Kawacha
MXN	Mexican Nuevo Peso
MXP	Mexican Peso
MYR	Malaysian Ringgit
MZM	Metical
NAD	Namibia Dollar
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder

Currency Code	Currency Name
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Polish Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROL	Leu
RUR	Russian Ruble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands Dollar
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	Saint Helena Pound
SIT	Tolar
SKK	Slovak Koruna

Currency Code	Currency Name
SLL	Leone
SOS	Somali Shilling
SRG	Suriname Guilder
STAT	Statistical
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad and Tobago Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling
UAK	Karbovanet
UGS	Uganda Shilling (Obsolete)
UGX	Uganda Shilling
USD	US dollar
USN	US Dollar (next day)
USS	US Dollar (same day)
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum

Currency Code	Currency Name
VEB	Bolivar
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	Gold
XCD	East Carribbean Dollar
XEU	European Currency Unit (E.C.U.)
XOF	CFA Franc BCEAO
XPB	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	Testing
YDD	Yemeni Dinar
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUN	Yugoslvia Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWD	Zimbabwe Dollar

C.7.2 Language Mappings

The following table lists values for language, Oracle language code, ISO language, territory, and ISO territory.

Languages	Oracle Language Code	ISO Language	Territory	ISO Territory
American	US	EN	America	US
Arabic	AR	AR	United Arab Emirates	AE
Brazilian Portuguese	PTB	PT	Brazil	BR
Bulgarian	BG	BG	Bulgaria	BG
Canadian French	FRC	FR	Canada	CA
Catalan	CA	CA	Catalonia	CT
Croatian	HR	HR	Croatia	YU
Czech	CS	CZ	Czechoslovakia	CZ
Danish	DK	DA	Denmark	DK
Dutch	NL	NL	The Netherlands	NL
Egyptian	EG	EG	Egypt	EG
English	GB	EN	United Kingdom	GB
Finnish	SF	FI	Finland	FI
French	F	FR	France	FR
German	D	DE	Germany	DE
Greek	EL	EL	Greece	GR
Hebrew	IW	IW	Israel	IL
Hungarian	HU	HU	Hungary	HU
Icelandic	IS	IS	Iceland	IS
Italian	I	IT	Italy	IT
Japanese	JA	JA	Japan	JP
Korean	KO	KO	Korea	KR

Languages	Oracle Language Code	ISO Language	Territory	ISO Territory
Latin American Spanish	ESA	ES	Mexico	MX
Lithuanian	LT	LT	Lithuania	LT
Norwegian	N	NO	Norway	NO
Polish	PL	PL	Poland	PL
Portuguese	PT	PT	Portugal	PT
Romanian	RO	RO	Romania	RO
Russian	RU	RU	CIS	SU
Simplified Chinese	ZHS	ZH	China	CN
Slovak	SK	SK	Slovenia	SI
Slovenian	SL	SL	Slovenia	SI
Spanish	E	ES	Spain	ES
Swedish	S	SV	Sweden	SE
Thai	TH	TH	Thailand	TH
Traditional Chinese	ZHT	ZH	Taiwan	TW
Turkish	TR	TR	Turkey	TR

Index

A

APIs, 6-15
Available to Promise (ATP), 3-14
 global, 9-2

B

B2B user permissions, 5-80, 6-36
 IBE_USER_ADMIN, 5-85
B2B user roles, 5-85
 creating, 6-36
 seeded values, 5-85
B2B users
 default customer responsibility, 5-79
 Role Management, 5-87
 user administration, 5-85
 User Management, 5-86
B2C users
 default customer responsibility, 5-79

C

cache management, 6-36
 product cache, 6-37, 6-39
 purging entire cache, 6-37
 section cache, 6-37, 6-38
Cascading Style Sheets, 6-13
categories, 6-27
 assigning display styles, 6-27, 6-28
 assigning multimedia, 6-27, 6-28
 assigning templates, 6-27, 6-28
concurrent programs
 checking program status, 5-9, 5-43

iStore - Express Checkout Order
 Submission, 5-4, 5-7
iStore Alert Reports, 5-5, 5-66
iStore Reports Complete Data Refresh Set, 5-5,
 5-7, 5-69
iStore Reports Fact Tables Refresh, 5-5, 5-65
iStore Reports Increment Data Refresh Set, 5-6,
 5-7, 5-72
iStore Reports Materialized Views Refresh, 5-5,
 5-66
iStore Search Insert, 5-4, 5-42, 5-45
iStore Section Search Refresh, 5-4, 5-44, 5-45
contracts, 11-1 to 11-7
cookies, 3-23
credit card payments, 12-2
currencies, 3-6
currency
 user choice, 5-17, A-13
customers
 responsibilities, 5-79
 user names and responsibilities, B-6

D

Data Out Bins, 5-64
 customizing drilldown pages, 5-74
debugging, 3-23, 8-2
dependency
 verification, 3-26
dependency requirements, 3-2
display styles
 assigning to categories, 6-27
 calling templates, 6-21
 cataloging, 6-21

seeded values, 6-21

E

error messages

IBE_DSP_J_CRT_HIER_SCT_FAIL, 8-6

IBE_DSP_J_GET_ITM_LST_FAIL, 8-17

IBE_ORD_CAUGHT_ERR, 10-13

MediaNotFoundException, 8-7

NullPointerException, 8-7

ORA-29868, 8-4

TemplateNotFoundException, 8-7

errors

catalog, 8-8

Display Manager, 8-7

Oracle8i interMedia ctxsys data dictionary, 8-21

Oracle8i interMedia post-installation, 8-22

Postsales, 8-20

pricing, 8-8, 8-12

product search, 8-14

shopping list, 8-14

Express Checkout

processing orders, 5-4, 5-7

G

globalization, 5-17, A-13

H

hardware requirements, 2-3

hierarchy

adding products to sections, 5-28

adding subsections to sections, 5-29

assigning products to, 5-21

creating, 5-21

creating sections, 5-23

modifying, 5-21

modifying sections, 5-27

moving sections, 5-31

host configuration, 3-23

I

installation

verification, 3-26

J

Java applet warning workaround, 8-3

JavaServer Pages, 6-11

JSPs, 6-11

 caching, 6-12

 Cascading Style Sheets, 6-13

 naming conventions, 6-13

 product search, 5-49

 source code directory, 6-12

K

keywords, 6-6, 6-7

L

language

 user choice, 5-17, A-13

languages, 3-6

lookup codes

 sales assistance, 3-7

 Storefront Reports, 5-75

M

Merchant UI, 5-12

multimedia

 assigning to categories, 6-27

 cataloging, 6-5

 creating media source files, 6-2

 customizing, 6-2

 naming, 6-4

multimedia components

 cataloging, 6-8

 seeded values, 6-9

N

notifications, 5-52

 adding configurations, 5-58

 configurable parameters, 5-55

 disabling, 5-62

 mapping messages, 5-54

- modifying configurations, 5-59
- parameter precedence, 5-54
- removing configurations, 5-61

O

- operating units
 - responsibilities, B-6
 - setting up multiple, 3-13, 3-20, 5-2, 5-91, A-7, A-32, B-6
- Oracle 8i interMedia, 8-21
- Oracle Advanced Supply Chain Planning, 9-1 to 9-2
- Oracle Application Object Library (AOL), 3-2
 - currencies, 3-6
 - languages, 3-6
 - sales assistance prompts, 3-7
 - Storefront Reports, 5-75
- Oracle Configurator, 10-1 to 10-14
- Oracle Contracts for Sales, 11-1 to 11-7
- Oracle CRM Technology Foundation, 3-2, 3-23
- Oracle Forms
 - logging in, 3-6, B-2
 - responsibilities, B-2
 - setting up Oracle iStore user accounts, 5-2
- Oracle General Ledger, 3-2, 3-8
- Oracle Human Resources, 3-2, 3-9
- Oracle Inventory, 3-2, 5-21, 5-25, 5-32
 - setting up, 3-12
 - setting up for product search, 5-40
 - setting up for the product catalog, 5-33
- Oracle iPayment, 12-1 to 12-3
 - setting up for credit card payments, 12-3
- Oracle iSupport, 13-1 to 13-2
- Oracle Marketing Online, 14-1 to 14-4
- Oracle Order Capture
 - setting up, 3-21
- Oracle Order Management, 3-3, 6-33
 - setting up, 3-19
 - setting up checkout page flexfields, 6-34
- Oracle Pricing, 6-33
 - setting up, 3-15
- Oracle Receivables
 - setting up, 3-14
 - setting up for credit card payments, 12-3

- Oracle Shipping Execution, 15-1 to 15-2
- Oracle Web Cache, 16-1 to 16-15
- Oracle Workflow, 17-1 to 17-6

P

- product catalog
 - modifying, 5-35
 - Oracle Inventory prerequisites, 5-33
 - setting up, 5-32
- product search
 - category-level, 5-42
 - changing type, 5-44
 - Oracle Inventory prerequisites, 5-40
 - profile options, 5-41
 - program units, 5-49
 - search index tables, 5-48
 - search tables, 5-40, 5-50
 - searchable attributes, 5-40, 5-51
 - section-level, 5-43
 - setting up, 5-39
 - stopwords, 5-52
- products
 - adding item descriptive flexfields, 6-30
 - assigning templates, 5-37
 - category-level presentation, 6-27
 - creating images for, 6-29
 - publishing, 5-35
- profile options
 - concurrent program manager, A-35
 - Customer UI, 5-89
 - Merchant UI, 3-22
 - Multiple Organization (MO), 5-91, A-32
 - Oracle Contracts Core (OKC), A-33
 - Oracle CRM Technology Foundation (JTT), 3-22, A-4
 - Oracle iStore (IBE), 3-22, 5-89, A-6 to A-29
 - Oracle Order Capture (ASO), 5-90, A-29
 - Oracle Order Management (OM), 5-90, A-31
 - setting, A-2
 - site level, 5-91, A-35

R

- relationship rules, 5-25, 5-28, 6-23

- creating mapping rules, 6-26
- creating SQL rules, 6-27
- relationship types, 6-23
 - adding relationship rules, 6-25
 - creating, 6-25
 - seeded values, 6-24
- relationships
 - creating, 6-23
- reporting problems, 8-23
- requirements
 - hardware, 2-3
 - Oracle applications, 3-2
 - software, 2-3
- responsibilities, B-1
 - creating, A-5
 - customers, 5-79, B-6
 - Oracle Forms, B-2
- roles, 5-80

S

- sales assistance, 3-7, A-26
- search index tables, 5-48
- searches
 - category-level, 5-42
 - section-level, 5-43
- seeded values
 - B2B user roles, 5-85
 - display styles, 6-21
 - multimedia components, 6-9
 - relationship types, 6-24
 - responsibilities, B-1
 - user roles, 5-82
- Self-Service Administrator UI, C-1 to C-66
- shipping
 - define methods, 3-14
 - enabling methods for Web, 3-20
 - parameters, 15-2
 - rules, 15-2
- shopping cart
 - checkout page flexfields, 6-34
 - credit card payments, 12-2
 - decimal quantities, 6-33
 - UOM conversions, 6-33
- software requirements, 2-3

- specialty store
 - creating, 4-2, 5-13
 - customization, 4-2
 - globalization, 5-13
 - root section, 5-15, 5-25, 5-26
 - testing the storefront, 7-2
- Storefront Reports, 5-64
 - architecture, 5-65
 - concurrent programs, 5-65, 5-66, 5-68
 - formats, 5-64
 - lookup codes, 5-75
 - preparing data, 5-68

T

- templates
 - assigning presentation levels, 6-17
 - assigning to categories, 6-27
 - Cascading Style Sheets, 6-13
 - cataloging, 6-17
 - creating template source files, 6-12
 - creating text for, 5-32
 - customizing, 6-11
 - JSP caching, 6-12
 - JSP naming conventions, 6-13
 - JSP source code directory, 6-12
 - modifying seeded source files, 6-13
 - naming, 6-16
- testing the store, 7-2

U

- user names
 - customers, B-6
- user roles
 - seeded values, 5-82
- users, B-1
 - concurrent program manager, 5-3
 - creating, A-5
 - guest account, 5-10, A-5
 - roles, 5-80
 - store manager account, 5-2