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Implementation and Administration Guide

Release 11*i*

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This document details the implementation and administration of Oracle iStore, Release 11*i* (11.5.9).

Oracle iStore Implementation and Administration Guide, Release 11i

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Send Us Your Comments

Oracle iStore Implementation and Administration Guide, Release 11i

Part No. B10603-01

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:
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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 11i of the *Oracle iStore Implementation and Administration Guide*.

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

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

If you have never used Oracle iStore, Oracle suggests you attend one or more of the Oracle iStore 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*.

Note: If you are viewing this document in either HTML or PDF format, the blue text links to additional details about the text topic.

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 implement and administer Oracle iStore.

Part I, "Getting Started"

- [Chapter 1, "Introduction"](#), provides an introduction to Oracle iStore and brief descriptions of its features, architecture, and technology.

- [Chapter 2, "Before You Begin"](#), summarizes Oracle iStore's application dependencies and details required setups in the mandatory dependencies.

Part II, "Implementing Oracle iStore 11i"

- [Chapter 3, "Implementation Overview"](#), provides an overview of the Oracle iStore implementation process and its tasks.
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#), details the required implementation tasks for Oracle iStore.

Part III, "Advanced Implementation Tasks"

- [Chapter 5, "Implementing Initial Customer UI Pages"](#), contains configuration details for the initial landing pages in your web stores.
- [Chapter 6, "Implementing Products"](#), contains information for implementing products in Oracle iStore.
- [Chapter 7, "Implementing Customer UI Catalog"](#), contains information on how to set up and configure the online catalog.
- [Chapter 8, "Implementing Customer UI Display"](#), provides details on altering the basic display of your online specialty stores.
- [Chapter 9, "Implementing Pricing"](#), describes how to implement pricing in your online stores.
- [Chapter 10, "Implementing Payment Types and Shipping Methods"](#), details how to set up store payment types and shipping methods for the stores.
- [Chapter 11, "Implementing Carts and Orders"](#), describes concepts and steps to implement and configure Oracle iStore shopping carts and lists, order placement, order tracking, and customer contact information functionality.
- [Chapter 12, "Implementing Users and Registration"](#), contains information on setting up your end users, including information about registration and user security.
- [Chapter 13, "Implementing Customer Assistance"](#), provides implementation details for the customer assistance features of Oracle iStore.
- [Chapter 14, "Implementing Messages and Prompts"](#), details how to configure the messages and prompts that display in the specialty stores.
- [Chapter 15, "Implementing Reports"](#), contains information on how to implement and use the reports functionality of Oracle iStore.

- [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#), provides considerations and guidelines for running your stores in a global scenario.
- [Chapter 17, "Implementing Performance and SSL"](#), describes how to implement Oracle iStore's web cache and SSL elements.

Part IV, "Post Implementation Tasks"

- [Chapter 18, "Verifying the Implementation"](#), describes tasks for verification of an Oracle iStore implementation.
- [Chapter 19, "Diagnostics and Troubleshooting"](#), provides tips for troubleshooting Oracle iStore implementation, use, and administration.

Part V, "Integration of Oracle Products"

- [Chapter 20, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#), describes the integration of Oracle iStore with Oracle Advanced Supply Chain Planning.
- [Chapter 21, "Integrating Oracle iStore with Oracle Bills of Material"](#), describes the integration of Oracle iStore with Oracle Bills of Material.
- [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#), describes the integration of Oracle iStore with Oracle Configurator.
- [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#), describes the integration of Oracle iStore with Oracle Content Manager.
- [Chapter 24, "Integrating Oracle iStore with Oracle iSupport Call-Me-Back Functionality"](#), describes the integration of Oracle iStore with Oracle iSupport.
- [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), describes the integration of Oracle iStore with Oracle Marketing.
- [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), describes Oracle iStore's integration with Oracle Quoting.
- [Chapter 27, "Integrating Oracle iStore with Oracle Sales Applications"](#), describes Oracle iStore's integration with Oracle Sales Applications.
- [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#), describes the integration of Oracle iStore with Oracle Sales Contracts.
- [Chapter 29, "Integrating Oracle iStore with Oracle Shipping Execution"](#), describes the integration of Oracle iStore with Oracle Shipping Execution.

- [Chapter 30, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), describes the integration of Oracle iStore with Oracle9iAS Web Cache.
- [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), describes the integration of Oracle iStore with Oracle Workflow.

Part VI, "Appendices"

- [Appendix A, "Profile Options"](#), lists the profile options that are relevant to Oracle iStore implementation and provides a procedure for setting profile options.
- [Appendix B, "Concurrent Programs"](#), discusses the concurrent programs utilized by Oracle iStore.
- [Appendix C, "Seeded Responsibilities"](#), summarizes the responsibilities required to perform the Oracle iStore implementation tasks described in this guide.
- [Appendix D, "Advanced Display"](#), contains information on advanced display functionality in Oracle iStore.
- [Appendix E, "Display Templates and Media Objects"](#), lists all of the display templates provided with Oracle iStore.
- [Appendix F, "Customer UI Process Flows"](#), contains graphical representations of typical and recommended business process flows through the Customer UI.
- [Appendix G, "Decommissioning Self-Service UI"](#), contains support information for migrating away from the Oracle iStore Self-Service UI application.

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, environment variables, table names
boldface text	Menu, button, keyboard, and form options, emphasis

Convention	Meaning
< >	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.

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 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.

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 (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 API Reference Guide

This guide has information about Oracle iStore Java APIs and standards for Oracle iStore JavaServer Page™ customization.

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.

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 products through Oracle iStore.

Oracle Content Manager User's Guide

This guide explains how to use the Oracle Content Manager screens that come with the Oracle Content Manager integration.

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.

Oracle CRM Technology Foundation Concepts and Procedures

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

Oracle CRM Technology Foundation Implementation Guide

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

Oracle General Ledger User Guide

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

Oracle Inventory User's Guide

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

Oracle iPayment Implementation Guide

This guide describes the implementation of Oracle iPayment.

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.

Oracle Marketing Implementation Guide

This guide describes the implementation of Oracle Marketing, which can be used for advanced product integration and to display marketing postings in Oracle iStore specialty stores.

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.

Oracle Order Management User's Guide

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

Oracle Pricing User's Guide

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

Oracle Quoting Implementation Guide

This guide provides information on setting up Oracle Quoting, a mandatory dependency for Oracle iStore. It also describes Oracle Quoting roles that use Oracle iStore permissions.

Oracle Quoting User Guide

This guide explains how sales representatives can use Oracle Quoting to view Oracle iStore carts and orders.

Oracle Receivables User Guide

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

Oracle Sales Contracts Concepts and Procedures

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

Oracle Shipping Execution User's Guide

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

Oracle8i interMedia Text Reference

This guide explains how to set up synonym files in Oracle8i interMedia, a necessary step to implement synonym product search functionality in Oracle iStore.

Oracle8i Server Administrator's Guide

This guide describes the administration of Oracle8i. It provides instructions on setting up Oracle interMedia when implementing Oracle iStore's product search.

Oracle9iAS Web Cache Administration and Deployment Guide

This guide explains the administration and deployment of Oracle9iAS Web Cache, which can be set up to cache and serve catalog and search pages for the Oracle iStore specialty stores.

Using Oracle HRMS - The Fundamentals

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

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 system profile options and 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 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 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 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.

Part I

Getting Started

This section gives you the information you need to begin implementing Oracle iStore 11*i*. It includes overviews of the product, descriptions of the Oracle iStore architecture and technology, summaries of application dependencies, and instructions for setting up mandatory dependencies.

This part contains the following chapters:

- [Chapter 1, "Introduction"](#)
- [Chapter 2, "Before You Begin"](#)

Introduction

This chapter provides an introduction to Oracle iStore 11i and briefly discusses the Oracle E-Business Suite applications.

Main topics in this chapter include:

- [Oracle E-Business Suite](#)
- [Oracle iStore Overview and Key Features](#)
- [New in this Release](#)
- [Architecture and Technology](#)

1.1 Oracle E-Business Suite

The Oracle E-Business Suite is a comprehensive web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, analyzing, and servicing through the Internet. The Oracle E-Business Suite consists of both front-office Customer Relationship Management (CRM) applications and back-office Enterprise Resource Planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes, as well as financial operations, project management, human resources operations, and business intelligence systems.

The Oracle E-Business Suite sits on a multi-layer platform which includes:

- [Oracle 9i Database](#)
- [Oracle 9i Application Server](#)
- [Common Services and Components](#)
- [Oracle Internet Business Intelligence](#)

Oracle 9i Database

All applications reside on the Oracle9i Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications (OLTP), query-intensive data warehouses, and high capacity web sites. Because the Oracle database is available on many different platforms, applications can scale from handheld to laptop to desktop to enterprise, providing consistent information over multiple channels.

Oracle 9i Application Server

The Oracle 9i Application Server (Oracle 9iAS) is a middle-tier server which independently delivers the technology needed to build web sites and applications, create personalized portals, extract business intelligence, and manage a secure web site infrastructure.

Common Services and Components

All the applications can leverage the common infrastructure and services components. Functionality includes Oracle Forms, Oracle Reports, Oracle Application Object Library (AOL), the Oracle JDeveloper and Oracle Discoverer development tools, the coding and UI standards, and other functionality used by the applications.

For example, you can extend the applications according to your business needs using flexfields. You can create and assign responsibilities using the system administrator responsibility. Also, you can use Oracle Workflow to configure background processes and set up notifications so that all the appropriate managers and groups are notified.

Oracle Internet Business Intelligence

Above the E-Business Suite sits the Oracle Internet Business Intelligence application. This application integrates data from all of the E-Business Suite applications to provide key performance measurements, operating alerts, and management reports to every decision maker across the enterprise.

1.1.1 Oracle E-Business Suite Applications

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP) in the Oracle E-Business Suite. The applications leverage Oracle's [Common Application Architecture](#).

The [Customer Relationship Management \(CRM\)](#) applications encompass:

- Marketing suite
- Sales suite
- Contracts suite
- Service suite
- eCommerce suite

The [Enterprise Resource Planning \(ERP\)](#) applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

Customer Relationship Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The **Marketing** suite provides campaign planning and execution, budget management, list creation, reporting, and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach, and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis, and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service, and operations.
- The **Sales** suite provides integrated tools for all players in the sales process, including field salespeople, telesales agents, distributors and resellers, sales executives, and Internet customers.

Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, executives can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and web specialty stores can collaborate in closing more business together as one sales team.

- The **Contracts** suite enables authoring, executing, and managing contracts, warranties and extended warranties, providing visibility to contract entitlements and the ability to proactively act upon contractual commitments. Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.
- The **Service** suite manages service activities with the goals of profitability, employee productivity, and enhanced customer satisfaction by comprehensively addressing service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

This suite of applications provides customer support, field service, and depot repair functionality. In addition, Oracle Service offers complete visibility into spare parts availability, logistics, service billing, and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across web, call center, and mobile field channels.

- The **eCommerce** suite of products aids in establishing profitable long-term relationships with customers through Internet availability, one-to-one marketing and personalized shopping experiences, as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating web-based channels with traditional channels.

Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- **Oracle Order Management** applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions, and the flexibility to adapt to changing business conditions.
- **Oracle Supply Chain Planning** applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- **Oracle Manufacturing** applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.

- **Oracle Financials** provide solutions for strategic planning, accounting, treasury, project management, and travel management.
- **Oracle Human Resources Management System** is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

Common Application Architecture

Oracle's Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, Oracle's Trading Community Architecture (TCA), consists of a database schema and Application Programming Interfaces (APIs) that enable the modeling of complex business community relationships and the ability to enter business community data consistently throughout the enterprise. Because TCA is not hierarchical, Oracle applications can model complex B2B2C relationships and not be limited to either a B2B or B2C implementation.

1.2 Oracle iStore Overview and Key Features

Oracle iStore 11*i* allows businesses from all industries to establish business-to-business (B2B) and business-to-consumer (B2C) electronic commerce (e-commerce). Oracle iStore provides merchants with an easy-to-use interface for setting up Internet stores that capture and process customer orders. In addition, integration with other Oracle applications provides a broad range of e-commerce capabilities.

Implementing Oracle iStore lets you:

- Build, test, and launch sophisticated online stores in multiple languages and currencies
- Target different customer segments and/or organizations
- Deploy stores in both B2B and B2C scenarios
- Capture and track customer information and activities
- Provide a full range of online purchasing capabilities

Key features and benefits of Oracle iStore 11*i* are discussed in this section. Topics include:

- [Section 1.2.1, "Store Administration User Interface"](#)
- [Section 1.2.2, "Catalog Management"](#)

- [Section 1.2.3, "Content Management"](#)
- [Section 1.2.4, "Store Reports and Bins"](#)
- [Section 1.2.5, "Automated User Communications"](#)
- [Section 1.2.6, "Background Data Management"](#)
- [Section 1.2.7, "User Management, Self-Service Registration, and Customer Information"](#)
- [Section 1.2.8, "Globalization and Localization Support"](#)
- [Section 1.2.9, "Interactive Selling and Ordering Options"](#)
- [Section 1.2.10, "Order Management and Fulfillment"](#)
- [Section 1.2.11, "Marketing and Customer Tracking"](#)
- [Section 1.2.12, "Business Objects, Components, and Processes"](#)

1.2.1 Store Administration User Interface

The friendly interface of the Store Administration application allows you to configure stores which are then presented as specialty stores in the Internet-enabled, customer-facing application known as the Customer UI.

The Store Administration UI allows you to perform the following main functions:

- Create and maintain of any number of online stores
- Easily duplicate stores, catalogs, and content
- In Preview mode, immediately preview the stores
- Configure the display order of store names as they are presented in the Customer UI
- Utilize the powerful search utilities that are present in each main page

Leveraging a unified, central application and repository of products and content, each store can have its own:

- Name
- Product catalog
- Section hierarchy
- Target users
- Currency

- Language
- Price lists
- Payment types
- Payment type thresholds
- Order amount limits
- Shipping terms
- Access restrictions
- Product and section exclusion rules
- Effective dates

Store creation is covered in [Section 4.2, "Creating Stores"](#).

1.2.2 Catalog Management

A full catalog management application is provided in the Store Administration UI, giving you a highly configurable Internet product presentation. Leveraging the powerful Oracle Inventory on the back-end and Oracle iStore's section building tool in the Store Administration UI, the Catalog is a flexible tool which supports multiple languages and currencies. Highlights include:

- A section hierarchy that can be as simple or complex as your business requirements necessitate. Sections are created in parent-child relationships. Products "hang" on nodes of the section hierarchy.
- Ability to control the browsing experience of the customer through section and subsection presentation.
- Cross-sell capabilities using the seeded Related items relationship, as well as support for a variety of other relationships between products, sections, and Inventory categories.
- A built-in search utility which allows you to locate a product by entering several criteria, including product name, number, category, description, as well as searching by stores that contain the product.
- Product search can support both Section Search and Category Search for different applications, simultaneously.
- Optional integration with Oracle interMedia allows you to set up a powerful product search in the specialty stores.

- A Display Template gallery which lets you quickly pick, in WYSIWYG fashion, the layout of sections and products.
- Targeted catalogs in the form of specialty stores for unique customers.
- The ability to exclude products and sections from specific stores.
- Product autoplacement feature which allows the populating of sections with products through a single batch job.
- Optional integration with Oracle Marketing allows you to create and maintain Inventory products, product templates, and several other product parameters.

For more information, see [Chapter 7, "Implementing Customer UI Catalog"](#).

1.2.3 Content Management

A content repository and reusable content components allow you to store, easily retrieve, and configure content to display in the online stores. Highlights include:

- Hundreds of configurable Display Templates present the Customer UI. This rich display environment presents a multitude of possibilities for altering the look and feel of the specialty stores.
- Re-usable content components and media objects.
- Easy-to-use interface for mapping source files to the media objects.
- Components and objects that are organized by type of display they effect.
- Display a single source file in any number of specialty stores.
- Easily update files which display in the specialty stores.
- Optional integration with Oracle Content Manager to provide content item creation, versioning, approvals, and a translation interface.

For more information, see [Chapter 8, "Implementing Customer UI Display"](#).

1.2.4 Store Reports and Bins

Within the Store Administration application, business and operational reports give you valuable real-time data about your stores. Updated through a concurrent program, operational reports provide a variety of information about published and unpublished products and sections, while the business reports give you important financial and customer data. Highlights include:

- Business Reports and Bins present the following data:

- Number of orders placed for a given time period
- The types of users making purchases and the top customers
- Top product sales for specific time periods
- Number of shopping carts converted to orders
- Operational Reports and Bins present the following data:
 - Product assignment and published/unpublished status reports
 - Section assignment and published/unpublished status reports

For more information, see [Chapter 15, "Implementing Reports"](#).

1.2.5 Automated User Communications

Oracle iStore automatically delivers e-mail notification messages to the appropriate users for such events as:

- Orders placed or cancelled
- Contract negotiations
- Shared carts
- Forgotten passwords and login assistance
- Registration confirmation

In addition, e-mail messages can be configured by organization, store, and user type, giving you immense flexibility in communicating with your customers.

This functionality is provided through iStore's integration with Oracle Workflow. See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), for more information.

1.2.6 Background Data Management

Several supplied concurrent programs in Oracle iStore automatically refresh data between business objects. For example:

- Lead import concurrent program pulls customer data from orders and expired carts into database tables for use in other Oracle applications
- Product search concurrent program automatically populates necessary tables with product updates for use in the Customer UI product search

- Reports refresh concurrent program supplies automatic updates of transactional and operational data about the stores

A summary of these concurrent programs is provided in [Appendix B, "Concurrent Programs"](#). You can find details about individual concurrent programs in the chapters which cover their core functionality.

1.2.7 User Management, Self-Service Registration, and Customer Information

Oracle iStore offers a full user management and registration interface in the Customer UI. For B2B users, seeded roles and permissions offer personalized features for different customer segments and business partners. Automatic user registration enables self-service access to the stores. Highlights include:

- Business-to-Business (B2B) functionality allows management of complex relationships with corporate customers in a self-service environment, including the ability to restrict access by organization. The seeded Primary User role allows organizational users to set up and manage a community of business users.
- Business-to-Consumer (B2C) functionality allows you to quickly launch an online presence to the buying public.
- Supplied integration with Oracle's customer data storage model, the Trading Community Architecture (TCA), provides the ability to maintain customer information and complex party relationships.
- Address Book and Payment Book functionality in the Customer UI allows users to maintain their own data.
- Ability to mandate the entry of B2B user contact information.
- Optional integration with Oracle Quoting allows interactive selling and online user assistance.

See [Chapter 12, "Implementing Users and Registration"](#), and [Chapter 11, "Implementing Carts and Orders"](#), for more information.

1.2.8 Globalization and Localization Support

Oracle iStore supports a global product catalog and infrastructure, allowing you to launch and maintain an international online presence. Highlights include:

- Global accounting through Oracle General Ledger allows you to set up multiple sets of books and business calendars.

- Oracle Multiple Organization Architecture gives you the ability to create and manage multiple organizations, inventory units, and warehouses internationally.
- Multiple currency support allows you to deploy stores --- with targeted products and prices --- in any country.
- The globally-oriented Specialty Stores Page is the default landing page for the Customer UI. It displays all stores in your implementation, with separate links for each supported language.
- Seeded media objects for specific languages, allowing you to display country-specific images for each language.
- Templates which can show taxes, payment and shipping methods, and address formats which are particular to a country for which the store has been set up.
- E-mail notification messages leveraging Oracle Workflow can be provided in all languages, and configured by organization, user type, and store.

See [Chapter 5, "Implementing Initial Customer UI Pages"](#), and [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#), for more information.

1.2.9 Interactive Selling and Ordering Options

Oracle iStore provides numerous options for interactive selling, user assistance, and ordering options for customers in the Customer UI application. Highlight include:

- Sales assistance
- Online contract negotiation
- Collaborative quoting
- Call-me-back functionality
- Sophisticated pricing
- Shared shopping carts
- Guided selling and product configuration online
- Product model bundles
- Order tracking
- Opt in/opt out capabilities
- Real-time inventory checks and reservations

- Shopping lists
- Order cancellation
- Automatic e-mail notifications
- Express checkout

Note that some of these features require integration with other Oracle applications. For more information, see [Chapter 9, "Implementing Pricing"](#), [Chapter 11, "Implementing Carts and Orders"](#), [Chapter 13, "Implementing Customer Assistance"](#), and [Part V, "Integration of Oracle Products"](#).

1.2.10 Order Management and Fulfillment

Supplied integration with the Oracle Order Management Suite's powerful combination of order processing tools provide a complete range of order management and fulfillment functions. Highlights include:

- Instant order transmission and fulfillment through Oracle Order Management
- Online automated payment processing through supplied integration with Oracle Order Capture
- Order cancellation abilities
- Optional integration with Oracle Financial applications can provide accounting support
- Order tracking, including the ability to view invoice, shipping, and payment details

For more information, see [Chapter 10, "Implementing Payment Types and Shipping Methods"](#), and [Chapter 11, "Implementing Carts and Orders"](#).

1.2.11 Marketing and Customer Tracking

Oracle iStore features a number of marketing and customer tracking options through its integration with other Oracle applications. These options include:

- Lead import functionality which allows the capture of valuable customer information from Oracle iStore shopping carts. Oracle Sales applications then can use the data in marketing efforts. See [Chapter 27, "Integrating Oracle iStore with Oracle Sales Applications"](#), for more information.
- Ability to post advertisements into Oracle iStore Customer UI bins, an option which leverages integration with Oracle Marketing.

- Customer event tracking through the optional Oracle Marketing integration. See [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.
- Ability to create deep link advertisements to the iStore Customer UI in other web pages -- see [Section D.8, "Creating Deep Links"](#), for details.

1.2.12 Business Objects, Components, and Processes

Oracle iStore includes the following business objects, components and processes, which allow it to store data, process information, and communicate with the Oracle database and other Oracle applications:

- **Business Objects** — The schema for representing and storing customers, orders, product catalog and presentation elements. These entities are persistent, shared across all Oracle applications, and manipulated by Java Application Programming Interfaces (API) provided within Oracle iStore's runtime services.
- **Runtime Services and APIs**—The coupling of certain common services available within all e-commerce applications (Oracle Foundation) and Java-based APIs (includes some PL/SQL APIs). This combination queries Oracle iStore's persistent storage of objects and relationships and enables update operations.
- **Configurable Customer UI templates** --- All Customer UI menus and pages are customizable using logical template names.
- **Processing and routing templates** --- Working in combination with the Display Templates, the processing and routing templates contain the logic and appropriate business flows through the online stores.
- **Oracle BLAF** --- Both the Store Administration and Customer user interfaces offer the Oracle BLAF (browser look and feel) compliant user interfaces (UI). The Oracle BLAF UI provides consistent look and feel and similar task flows across the Oracle E-Business Suite applications. All section and item runtime templates are BLAF compliant.

1.3 New in this Release

This section contains information on what is new in the Oracle iStore 11i Release 11.5.9.

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using

product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult Oracle MetaLink for relevant product patches and documentation.

Topics include:

- [New Store Administration User Interface](#)
- [Product Autoplacement Functionality](#)
- [Payment Threshold Functionality](#)
- [Operational Reports and Bins](#)
- [New Features for the Customer Facing UI](#)
- [Oracle Content Manager Integration](#)
- [Oracle Marketing Integration Enhancement](#)
- [Oracle Configurator Integration Enhancements](#)
- [New Notification Events](#)
- [New Profile Options](#)
- [New Concurrent Programs](#)
- [Obsolete Profile Options](#)

1.4 New Store Administration User Interface

The administrator (merchant) UI for Oracle iStore has been completely re-designed. Following are the highlights of the new UI:

- [Enhanced Preview](#)
- [Enhanced Search](#)
- [Store Creation and Maintenance](#)
- [Enhanced Section Hierarchy Management](#)
- [Enhanced Product Management](#)
- [Content Repository](#)
- [Segregation of Advanced Functionality](#)
- [Reports Dashboard](#)
- [Oracle BLAF Compliant User Interface](#)

Note: In previous releases, the administrator UI was called the Merchant UI. Beginning with this release, it will be referred to as the Store Administration UI.

Before this release Oracle iStore provided two merchant applications: one for advanced users (the Merchant UI) and one for basic users (the Self-Service Administration UI). These two UIs have been merged into the new Store Administration UI.

Important: Beginning with this release, the Oracle iStore Self-Service Administration UI has been decommissioned and is no longer supported. However, greater functionality is provided through the use of the Store Administration UI and other integrating Oracle applications. See [Appendix G, "Decommissioning Self-Service UI"](#), for more information.

The new Store Administration application provides the advanced functionality in a self-service, easy-to-use manner and removes the necessity of using two different applications for two different user types.

1.4.1 Enhanced Preview

Before this release, store managers had to use a different browser and navigate to the Customer UI in order to preview a store; using the same browser session used to cause unwanted cookie updates. Store managers now can preview specific specialty stores, or a section/product for a specific specialty store, in a modal window with one click. Store managers can preview a specialty store at any stage of the process by using the Preview buttons that are provided on the store/section/product summary, and detail pages.

See [Section 18.1.2, "Using Preview Mode"](#), for more details.

1.4.2 Enhanced Search

This release of Oracle iStore offers simple and advanced search functionality, with additional attributes and filters on almost every summary page in the Store Administration UI.

1.4.3 Store Creation and Maintenance

What used to span several tabs in the UI now is consolidated into one area under the **Stores** tab. Within this tab are full store creation and maintenance capabilities, including:

- Creating new stores
- Maintaining stores, including mapping languages, currencies, payment types, price lists, and responsibilities to them
- Searching for stores
- Duplicating stores
- Deleting stores
- Previewing specialty stores within stores
- Restricting access to stores by organization
- Setting the display order of specialty stores in the Customer UI

See [Section 4.2, "Creating Stores"](#), for more details.

1.4.4 Enhanced Section Hierarchy Management

Consolidated under the **Sections** subtab within the **Catalog** tab, this re-designed area in the Store Administration UI makes it easy to perform the following section tasks:

- View a complete list of all sections within the hierarchy
- Create new sections and subsections
- Focus on a particular node of the section hierarchy
- Add several products to a section at one time
- Duplicate sections, with all related children (subsections or products) being copied and all content being referenced to the new section
- Use the new Templates Gallery to set a Display Template to control the appearance of sections
- Use the enhanced user interface for associating content to sections; users can directly create media objects and see media object details from the Sections > Content page
- Search for sections, including advanced searching

- Map sections to categories for Product Autoplacement
- Preview sections within the context of the specialty stores that include them

See [Chapter 7, "Implementing Customer UI Catalog"](#), and [Chapter 8, "Implementing Customer UI Display"](#), for more details.

1.4.5 Enhanced Product Management

Located under the **Products** subtab within the **Catalog** tab, the product management area also has been redesigned in the new Store Administration UI. This new design facilitates the ease of performing the following product tasks:

- Use the new Templates Gallery to set Display Templates to control the layout of products
- Preview products within the context of the specialty stores that include them
- Use the enhanced user interface for associating content to products; users can directly create media objects and see media object details from the Products > Content page
- Search for products, including a powerful advanced search

See [Chapter 7, "Implementing Customer UI Catalog"](#), and [Chapter 8, "Implementing Customer UI Display"](#), for more details.

1.4.6 Content Repository

Available within the **Content** tab in the Store Administration UI, Oracle iStore's Content Repository capability now provides the following:

- Search for and upload files (or groups of files) from the file system to a content repository
- Preview files in the content repository
- Obtain quick access to files from the content repository in order to assign them to media objects -- in this way, you can display images and html content in your specialty stores

See [Section 8.3, "Content Overview"](#), and [Section 8.6, "Using the Content Repository"](#), for more details.

1.4.7 Segregation of Advanced Functionality

The new **Advanced** tab in the Store Administration UI now contains advanced functionality, allowing better organization of UI elements and store administrator tasks. Following are the highlights:

- The **Notifications** subtab contains the entirety of the e-mail notification events functionality. The new UI design allows easy access to notification event details and configurable parameters. In addition, several of the notification events now can be mapped at the store level. See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), for more details.
- The **Template Manager** subtab allows a consolidated place to perform template creation and maintenance tasks. This subtab also contains the Display Styles functionality, which can be hidden through the use of a new profile option. See [Section 8.2, "Display Templates Overview"](#), [Section D.1.5, "Creating New Templates"](#), and [Section D.5.3, "Using Display Styles for Default Display"](#), for more details.
- The **Categories** subtab provides one central location for mapping Oracle Inventory item categories to display parameters. In this way, you can provide default content in your specialty stores at the product category level. See [Section D.5.4, "Configuring Product Presentation at the Category Level"](#), for more details.
- The **Content Components** subtab gives store administrators a single location for creating and managing content components. Content components are content-type placeholders in the Display Templates. [Section D.5, "Advanced Content Tasks"](#), for more details.

1.4.8 Reports Dashboard

New in Release 11.5.9 is the Reports Dashboard within the Store Administration UI's **Reports** tab. The Dashboard features quick access to both business and operational reports presented by Oracle iStore. The business reports provide accurate, intelligent data about your stores and their customers, while the operational bins on the Dashboard page gives you lists of unpublished sections and products. Some of the reports leverage integration with Oracle Discoverer 4i.

A complete list of the reports and bins available in Oracle iStore can be found in [Chapter 15, "Implementing Reports"](#).

For a list of the new reports and bins in this release, see the section below: [Section 1.7, "Operational Reports and Bins"](#).

1.4.9 Oracle BLAF Compliant User Interface

Both the new Store Administration UI and Customer UI now offer the Oracle BLAF (browser look and feel) compliant user interface. The Oracle BLAF UI provides consistent look and feel and similar task flows across the Oracle E-Business Suite applications.

1.5 Product Autoplacement Functionality

Oracle iStore's new Product Autoplacement functionality simplifies catalog maintenance by leveraging pre-defined Oracle Inventory categorization of products. Store managers can now associate sections with inventory categories, and a background job automatically publishes all the products under sections that have the same Inventory category associations.

See [Section 6.6, "Using Product Autoplacement"](#), for more details.

1.6 Payment Threshold Functionality

Mandating the use of credit cards for purchases less than a designated amount can provide a significant benefit to certain web stores. For many corporations, transactions below a certain threshold amount are written off as bad debt. Tracking and collecting payments for a small currency amount often isn't worth the collection effort. Therefore, many businesses moving toward mandating specific payment types for purchases that fall under a certain payment amount. To accommodate this business requirement, Oracle iStore offers the Payment Threshold feature that enables the merchant to limit payment methods when certain customers are making low amount transactions.

See [Section 10.7, "Setting up a Threshold for Payment Types"](#), for more details.

1.7 Operational Reports and Bins

Leveraging Oracle iStore 11*i* bins and Oracle Discoverer 4*i* reports, the following new operational reports and bins are available with this release:

Products Operational Reports and Bins

The following product reports and one bin are new in this release:

- Unassigned Products Report
- Assigned Products Report

- Products by Stores Report
- Products Excluded by Store Report
- Unpublished Products Bin

See [Section 15.7.1, "Product Reports and Bins"](#), for more details.

Sections Operational Reports and Bins

The following section reports and one bin are new with this release:

- Sections With Store Assignment Report
- Sections Without Store Assignment Report
- Sections With Store Exclusion Report
- Empty Sections Report
- Unpublished Sections Bin

See [Section 15.7.2, "Sections Reports and Bins"](#), for more details.

1.8 New Features for the Customer Facing UI

The following new features have been introduced in this release for the Customer UI:

- [Re-designed Customer UI](#)
- [Performance Improvements](#)
- [Account and Party Merge Support](#)
- [New Shopping Cart Bin Templates](#)
- [Shopping Cart Usability Enhancements](#)
- [Shopping Cart Defaulting](#)
- [Shopping Cart Expiration Enhancement](#)
- [Shopping Cart/Quote Sharing Enhancements](#)
- [Order Tracker User Hook for Shipping Lines](#)
- [Express Checkout Preferences Enhancement](#)

1.8.1 Re-designed Customer UI

In this release, the Customer UI has been completely re-designed, providing a fully BLAF-compliant interface and easier-to-use screens.

In addition, the usability of table records has been improved in terms of navigation. Now, all table navigation UIs are consistent in look and feel, and easily configurable by changing the included JSP pages.

1.8.2 Performance Improvements

Numerous performance improvements have been made in catalog loading and pricing calls. This improved data retrieval results in faster loading of data.

1.8.3 Account and Party Merge Support

New in this release is documentation for how iStore handles the Oracle TCA Account Merge and Party Merge operations for shared and active carts. See [Section 11.7, "Oracle iStore and Party / Account Merge"](#), for details.

1.8.4 New Shopping Cart Bin Templates

Fourteen new bins have been introduced for the shopping cart page. These bins are empty container templates which allow you to map your own content to display in the shopping cart. See [Section D.6.4, "Configuring Shopping Cart Page Bins"](#), for more information.

1.8.5 Shopping Cart Usability Enhancements

This release offers improved shopping cart functionality in the form of usability enhancements in the following areas: shopping lists, pricing agreements, promotion codes, attachments, and ATP.

In addition, a new Display Template gives you the option of showing or hiding tax and shipping/handing information in the shopping cart. See [Section 11.1, "Shopping Carts"](#), for more details.

1.8.6 Shopping Cart Defaulting

Oracle iStore now defaults certain information into the users' pages as the user goes through the checkout process. This defaulting both improves the performance of the checkout flow, and makes the checkout process easier for customers. See [Section 11.3.2, "Shopping Cart Defaulting"](#), for more details.

1.8.7 Shopping Cart Expiration Enhancement

Customers now can see related expiration dates on their quotes and carts. See [Section 11.1.18, "Shopping Cart Expiration Values"](#), for more details.

1.8.8 Shopping Cart/Quote Sharing Enhancements

Share cart functionality in the Customer UI has the following important enhancements:

- Concurrent access to a cart for the owner and the recipients of the cart
- More organized and easy-to-use, with new page flows that offer reduced number of steps and greater flexibility -- for example, users now can share carts from checkout pages
- New screens allow easier tracking of carts; now users can see all (saved/shared) carts in one place under the My Carts subtab
- More details shown in cart detail page -- now users can see shipping, billing, line level information on the shared cart detail page
- B2B support for shared cart functionality is enhanced to include functionality which allows the users to search for and select recipients from members of their own organization. This also is a security enhancement that prevents users from outside an organization from seeing the organization's pricing data.
- B2B users can now search for recipients from within their organizations' user lists
- Users can now share published quotes
- Several new e-mail notification messages have been introduced -- now the cart owner and recipient will receive notifications when different events occur (e.g. delete cart, stop working, remove cart access, change access level)
- No more cart versioning and copying: Earlier in iStore, when users shared a cart or activated a shared cart, a copy would be made of the cart. Sometimes this could result in the owner and recipient seeing different cart data. Now, iStore has only one version of the cart; therefore, cart owner and recipient will always see consistent information.
- For B2B users, no more dependence on Oracle Workflow to retrieve a shared cart. Beginning with this release, for a B2B recipient to access a shared cart, he simply needs to sign in and access the cart in the Cart menu or by selecting the saved/shared carts link in the Welcome bin. In earlier versions, B2B users had to receive a notification e-mail first before they could access the shared cart.

- Consistent pricing of carts: Now a shared cart's pricing always is based on the sold-to customer. Earlier, a profile option allowed the cart to be priced based on the cart recipient, which was not an optimal solution. The profile has been obsoleted in this release.

For more information on the functionality discussed above, see:

- [Section 1.15, "Obsolete Profile Options"](#)
- [Section 11.2, "Shopping Cart Sharing"](#)

1.8.9 Order Tracker User Hook for Shipping Lines

Oracle iStore allows customers to check their order and shipping details via the Order Tracker module. Merchants can now extend the shipping detail region to show additional information or interface to third party or legacy systems without customization. Merchants can enable an additional column on the shipping details table and map their own processing logic via the template manager. This hook can be used to link to the shipping carrier sites for more complete shipment tracking. See [Section 11.5.7.1, "Enable Region Item in Shipment Details Page"](#), for details.

1.8.10 Express Checkout Preferences Enhancement

In the redesigned Customer UI, the Express Checkout Preferences UI is using the same list of addresses as in checkout flow. This ensures consistent address selection across the application. See [Section 11.3.8, "Express Checkout"](#), for more information on Express Checkout.

1.9 Oracle Content Manager Integration

Oracle iStore users can now integrate with Oracle Content Manager (OCM) to leverage OCM's range of content management abilities from within the Store Administration UI. Integrating with OCM can provide:

- Content item creation based on content types
- Content versioning
- Approval workflow processes
- Translation interface
- Content Library, allowing an easy search and reuse of existing content items

The content then is used with existing Oracle iStore media objects and content components functionality to present the content in the Oracle iStore Customer UI. In addition, the iStore-OCM integration features:

- Complete integration between content management functionality and the iStore catalog.
- Content Usage summary: an easy to use interface to maintain content already in use in iStore.

See [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#), for details.

1.10 Oracle Marketing Integration Enhancement

Oracle Marketing integration provides enhanced product creation and management capabilities for Oracle iStore, including:

- Product creation and maintenance
- Product template creation and maintenance
- Product maintenance, including updating Inventory and Order Management product attributes
- Product assignment to Inventory organizations
- Product assignment to Inventory categories
- Price list maintenance, including changing item prices and UOMs
- Oracle Bills of Material definitions, including specifying item sequence, item, and quantity

1.11 Oracle Configurator Integration Enhancements

The following enhancements have been made to the Oracle Configurator integration with Oracle iStore:

1.11.1 Solution-Based Modeling Support

Oracle Configurator allows users to create multiple instances of a sub-model in a configuration. When using Oracle Configurator with Oracle iStore, users can select multiple quantities of a single sub-model and configure each quantity separately.

Oracle iStore displays and prices each sub-model according to its individually selected options.

1.11.2 Configured Item Quantity Update in the Cart

Customers can now update quantities of configured items in the shopping cart. Configured items are accomplished through Oracle Configurator integration.

For more information, see [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#).

1.12 New Notification Events

Several notification events related to share cart functionality have been introduced in Oracle iStore Release 11.5.9.

These include:

- Shared Quote Notification
- Change Access Level by Cart Owner
- Change Access Level by Quote Owner
- Remove Cart Access by Recipient
- Remove Quote Access by Recipient
- Stop Sharing by Cart Owner
- Stop Sharing by Quote Owner

These notification events are described in [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#).

1.13 New Profile Options

The following profile options have been introduced in Oracle iStore Release 11.5.9:

- **IBE: Use Display Order Feature** --- This new profile option specifies whether you can manually order the display of specialty stores across all stores in the Stores: Display Order page. See [Section 4.2.2.9, "Create a Store: Manually Ordering Specialty Store Display Names"](#), for more details.
- **IBE: Enable Display Style** --- This new profile option specifies whether Display Styles functionality shows up in the Store Administration UI. If set to Yes,

Display Styles can be selected in the Display Templates pages for Products and Sections; also, new Display Styles can be created in the Template Manager subtab within the Advanced tab. If set to No, the functionality is not available. See [Section D.5.3.1, "Enabling Display Styles"](#), for more details.

- **IBE: Cart Retrieval by Number for B2B** --- This new profile option allows B2B users to use a cart retrieval number in the My Carts page to retrieve a cart. See [Section 11.2.8, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#), for details.
- **IBE: Number of Days for Expiring Content** --- This profile option determines the timeframe for the default search performed in the Usage Summary screen. This profile option applies only when integrating with Oracle Content Manager. See [Section 23.3, "Implementing Oracle iStore-Oracle Content Manager Integration"](#), for details.
- **IBE: Use Advanced Product Setup** --- This profile option controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Store Administration UI. See [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

1.14 New Concurrent Programs

The following concurrent programs have been introduced in Oracle iStore Release 11.5.9:

- **iStore Autoplacement Concurrent Program** --- This new concurrent program can be used to populate and remove products to/from your catalog sections, based on Oracle Inventory categories. For more information, see [Section 6.6, "Using Product Autoplacement"](#).
- **iStore Content Items Migration** --- This new concurrent program is a data migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). See [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#), for more information.

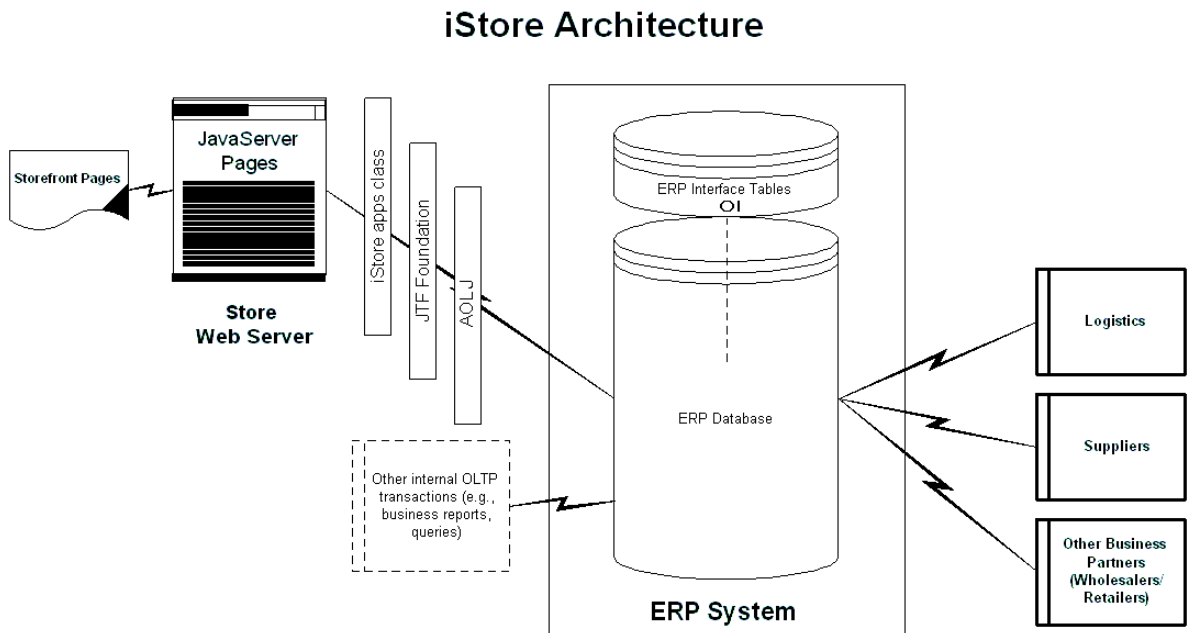
1.15 Obsolete Profile Options

The profile option, **IBE: Shopping Cart Price based on Owner**, is obsolete in this release of Oracle iStore. Previously, this profile could be used in shared carts functionality to change the pricing in the cart from the cart owner to the recipient. In current share cart functionality, the cart pricing always will be based on the cart owner.

1.16 Architecture and Technology

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

Figure 1–1 Oracle iStore 11i Architecture



1.16.1 Software Dependencies

Oracle iStore 11i's software dependencies are listed in the following table.

Table 1–1 Software Dependencies

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 software dependencies:

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

1.16.2 Hardware Dependencies

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 Oracle 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 dependencies listed in the following table are guidelines only and assume a single-node environment.

Table 1–2 Hardware Dependencies

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)

Before You Begin

This chapter describes the tasks that **must be performed** before beginning your implementation of Oracle iStore 11*i*.

Note: Implementation tasks related directly to Oracle iStore begin in [Chapter 3, "Implementation Overview"](#), and continue in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).

The mandatory dependencies discussed in this chapter must be implemented in order for your implementation to be successful.

This chapter's main topics include:

- [Related Documentation](#)
- [Dependencies and Integrations to Other Oracle Applications](#)
- [Accessing the Applications](#)
- [Install Software](#)
- [Multi-Language Setup \(MLS\)](#)
- [Initial Installation Verification](#)
- [Setting up Oracle Receivables](#)
- [Setting up Oracle General Ledger](#)
- [Setting up Oracle Human Resources](#)
- [Setting up Oracle Inventory](#)
- [Setting up Oracle Order Management](#)
- [Setting up Oracle CRM Technology Foundation](#)
- [Dependency Verification](#)

- [Optional Integrations with Oracle iStore](#)
- [Oracle iStore Example Integrations Diagram](#)

2.1 Related Documentation

For setup documentation and product support through Oracle Support, please refer to the manuals listed in the [Preface](#) of this book and visit [Oracle MetaLink](#) (<http://metalink.oracle.com>).

2.2 Dependencies and Integrations to Other Oracle Applications

Oracle iStore 11i integrates with many other Oracle applications to provide and extend its functionality; therefore, a large portion of your implementation will involve understanding and setting up the integrating applications. This section contains:

- [Section 2.2.1, "Overview of Dependencies and Integrations"](#)
- [Section 2.2.2, "Mandatory Dependency Implementation Steps"](#)

2.2.0.1 Oracle iStore and Multiple Organizations

Information about multiple organizations (multi-org), specific to Oracle iStore, is contained in [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#). For Oracle Applications multi-org information, see:

- *Multiple Organizations in Oracle Applications*, Part No. A81174-02.

To find this manual, visit [Oracle MetaLink](#) (<http://metalink.oracle.com>) and search for the part number listed above. Or, navigate to Top Tech Docs > E-Business Suite: ERP > Applications Core Technology > Multiple Organizations Architecture > Manuals and eTRMs > Architecture section.

2.2.1 Overview of Dependencies and Integrations

Oracle iStore's dependencies and integrations range from those applications that supply an underlying structure for your stores to those that extend its functionality and capabilities. The applications that provide structure are mandatory, while ones that enhance Oracle iStore are optional integrations.

For example, Oracle Inventory and Oracle Order Management, respectively, provide a product repository and an order management system. Therefore, they are integral to the functioning of Oracle iStore, and are considered mandatory

dependencies. On the other hand, Oracle iPayment and Oracle Marketing, respectively, allow online credit card authorizations and personalized web content. If, for example, you do not set up these latter two applications, Oracle iStore will still function. Therefore, these are considered optional integrations.

2.2.1.1 Mandatory Dependencies

Oracle iStore mandatory dependencies are Oracle products which provide the underlying technology stack, schema, and structure.

Oracle iStore 11*i* mandatory dependencies are:

- Oracle Receivables
- Oracle General Ledger
- Oracle Human Resources
- Oracle Inventory
- Oracle Order Management
- Oracle Order Capture
- Oracle CRM Technology Foundation

Limited setup information is contained in this chapter. See [Section 2.2.2, "Mandatory Dependency Implementation Steps"](#) for implementation steps.

Refer to the product-specific implementation and user manuals for complete information. A list of these guides can be found in the [Other Information Sources](#) section of the [Preface](#).

2.2.1.2 Optional Integrations

Oracle applications that extend Oracle iStore's capabilities are considered optional integrations. Basic setup information is contained in this guide, but you will need to refer to the product-specific setup and user manuals for complete information. 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.

See [Section 2.14, "Optional Integrations with Oracle iStore"](#), for discussion of these applications.

2.2.2 Mandatory Dependency Implementation Steps

The following table, Mandatory Dependencies Setup Steps, provides a recommended sequence for beginning your implementation and setting up the Oracle iStore mandatory dependencies.

Note: If you are viewing this document in either HTML or PDF format, the items in the Reference column of the following table are hyperlinks which will take you to the section referenced.

Table 2–1 Mandatory Dependencies Setup Steps

Step	Required	Reference
1. Install Software	Yes	Section 2.4, "Install Software"
2. Verify Underlying Technology Stack Installation	No	Section 2.6, "Initial Installation Verification"
3. Set up Oracle Receivables	Yes	Section 2.7, "Setting up Oracle Receivables"
4. Set up Oracle General Ledger	Yes	Section 2.8, "Setting up Oracle General Ledger"
5. Set up Oracle Human Resources	Yes	Section 2.9, "Setting up Oracle Human Resources"
6. Set up Oracle Inventory	Yes	Section 2.10, "Setting up Oracle Inventory"
7. Set up Oracle Order Management and Oracle Order Capture	Yes	Section 2.11, "Setting up Oracle Order Management"
8. Set up Oracle Pricing	Yes	Section 2.11.2, "Setting up Pricing"
9. Set up Oracle CRM Technology Foundation	Yes	Section 2.12, "Setting up Oracle CRM Technology Foundation"

2.3 Accessing the Applications

Tasks in this guide require login on the following two Oracle technology stacks:

- **Oracle Application Object Library (AOL)** -- also known as Oracle Forms. See [Section 2.3.0.1, "Accessing Oracle Forms"](#).
- **Oracle E-Business Suite HTML login (JTF login)** -- the HTML login that you access from within an Internet browser. Microsoft Internet Explorer 5.5 (with cookies enabled) is the recommended browser setup for accessing the HTML-based applications. See [Section 2.3.0.2, "Accessing Oracle E-Business Suite HTML Applications \(JTF login\)"](#).

Oracle Applications come with a supplied (seeded) system administrator login, with which you can access both Forms and the E-Business Suite HTML login. The seeded login is:

- **Username:** sysadmin
- **Password:** sysadmin

It is strongly recommended that you change the password at your earliest convenience after installing and accessing the applications. For more information, see:

- *Installing Oracle Applications, Release 11i (11.5.8)*
- *Upgrading Oracle Applications, Release 11i (11.5.8)*
- *Oracle Applications Release Notes, Release 11i (11.5.8)*

Visit [Oracle MetaLink](#) for these installation and upgrade documents.

2.3.0.1 Accessing Oracle Forms

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

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

and clicking **Apps Logon Links > VIS Logon through the Forms cartridge**.

Once logged into Oracle Forms, you can select from a list of responsibilities which determine the functionality you are allowed to use. Generally, these responsibilities are tied to business-specific tasks or processes. Examples include: Inventory, Human Resources, General Ledger, Receivables, and Order Management. Use the System Administrator responsibility to set profile options, create users, modify responsibilities, among other system administration tasks. See *Oracle Applications System Administrator's Guide* for additional details.

2.3.0.2 Accessing Oracle E-Business Suite HTML Applications (JTF login)

Oracle E-Business Suite HTML Foundation provides the underlying stack for the Oracle HTML applications. This login is known as the Oracle E-Business Suite HTML login, or the JTF login. Launch Oracle E-Business Suite HTML applications by navigating to:

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

Log in with the appropriate username and password. The seeded username/password is:

- Username = `sysadmin`
- Password = `sysadmin`

2.3.0.3 Responsibilities and Oracle Applications

All Oracle applications use the concept of user responsibilities for basic user security and application mapping. Which responsibility a username logs in with will determine the application (and hence, the menus) that appear. Each responsibility is mapped to a menu structure in Oracle Forms. To change your default responsibility in the HTML applications, select the Profile button at the top of the screen. For Forms applications, you do not need a default responsibility, since you will select one from a pick-list after logging into Forms. For more information on Oracle responsibilities, see [Chapter 12, "Implementing Users and Registration"](#), and [Appendix C, "Seeded Responsibilities"](#).

2.4 Install Software

Your installation needs will vary depending upon whether you are doing a fresh install (no previous Oracle applications installed), a multi-application upgrade using a Family Pack or Maintenance Pack, a multi-application upgrade involving several patches, or simply installing a single patch. In general, this documentation assumes you are doing a fresh install, although limited information is presented regarding upgrading and patching.

If you are installing Oracle Applications Release 11*i* for the first time, or upgrading to Release 11*i* from Release 11.0.x or Release 10.7, use the appropriate version of Oracle Rapid Install as documented in:

- *Installing Oracle Applications, Release 11i*
- *Upgrading Oracle Applications, Release 11i*
- *Oracle Applications Release Notes, Release 11i*

See [Oracle MetaLink](#) for these installation and upgrade documents.

Oracle strongly recommends that you upgrade to the latest available CD or Maintenance Pack.

2.4.0.4 Steps to Capture System Profile Option Values Before Upgrading

You can use FNDLOAD to backup your profiles and profile values by downloading the profiles.

Example 2–1 Capture System Profile Option Values Before Upgrading

Download

```
FNDLOAD apps/apps 0 Y DOWNLOAD $FND_TOP/admin/import/afscprof.lct $XXX_
TOP/admin/sql/profiles_bak.lct PROFILE FND_PROFILE_OPTION_VALUES
PROFILE_NAME='XXPOP%'
```

Upload

```
FNDLOAD apps/apps 0 Y UPLOAD $FND_TOP/admin/import/afscprof.lct $XXX_
TOP/admin/sql/profiles_bak.lct
```

Note: You should use the same version for download and upload.

2.4.0.5 Where to Find Release and Upgrade Information

For information on patch releases and specific Family or Maintenance Pack details, please visit [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

2.4.0.6 Running Rapid Install

Rapid Install (RapidWiz) installs a complete set of Oracle Applications products at the latest available Maintenance Pack level. It installs the required technology stack and creates the Oracle Applications database. You can use Rapid Install to install any of three environments: a production installation, a test installation, and an installation of the sample environment, known as Vision Demo.

In addition, Rapid Install lets you license products, country-specific functionality, and languages through License Manager.

Note: You must enter a value for the DNS name in the Rapidwiz. Failing to do so will cause problems, especially in the CRM area, where a domain is expected.

For more information on Rapid Install, see the following:

- *Oracle Applications R11.5.3/R11.5.4/R11.5.5 Installation/Upgrade Issues* (MetaLink note)
- *Installing Oracle Applications, Release 11i*

- *Upgrading Oracle Applications, Release 11i*

These documents are available on [Oracle MetaLink](#). Also see the documentation listed in the [Preface](#) of this guide.

2.4.0.7 Using AutoPatch (adpatch)

AutoPatch (adpatch) is a utility that is used to apply individual patches, mini-packs, or maintenance packs to an existing Oracle Applications instance. Every patch or group of patches (a pack) will have a unique number associated with it. Read the *Read Me* file associated with each patch or pack.

- For information about how to use Adpatch and other utilities, refer to the latest *AD Utilities Reference Guide, Release 11i*. This document is available on [Oracle MetaLink](#).

2.5 Multi-Language Setup (MLS)

Oracle Applications supports the installation of Multiple Language Support, known by the acronym MLS. MLS is also known as National Language Support, or NLS.

To install more than one language, see the following:

- *Installing Oracle Applications, Release 11i (Chapter 5 - Finishing your Installation - Setup National Language Support (NLS))*.
- *Note 177183.1, Successfully Installing NLS/MLS in 11.5.x - The Definitive Guide*
- *Note 177837.1, NLS/MLS - Setup and Usage*
- *Doc. 73352.1, NLS/MLS Frequently Asked Questions*

These documents can be found on [Oracle MetaLink](#) (<http://metalink.oracle.com>).

Oracle iStore features a global store selection homepage where users can select from a list of specialty stores in the languages which you have enabled. For more information on options for the customer start pages, see: [Chapter 5, "Implementing Initial Customer UI Pages"](#).

Information on globalization and multiple organizations is contained in [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#).

2.6 Initial Installation Verification

Before proceeding with the implementation of Oracle iStore and its dependencies, you must verify that you have installed Oracle Applications correctly.

Verify that the installation and middle tier setups are correct.

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

- **Apache Server:** Go to `http://<host>:<port>/apachedocs/`. You should see the Apache Server documentation page.
- **Apache JServ:** Go to `http://<host>:<port>/servlets/IsItWorking`. You should see a message verifying that Apache JServ is working.

See *Installing Oracle Applications* for more information. This manual is available on [Oracle MetaLink](#).

2.7 Setting up Oracle Receivables

Oracle Receivables calculates taxes and generates invoices. Bundled with the install of Oracle Receivables is the Oracle centralized data repository for customer information -- the Trading Community Architecture (TCA) model. Customer registration information is maintained in the TCA/Oracle Receivables schema.

- [Section 2.7.1.1, "Oracle Trading Community Architecture"](#), has more information on the TCA.

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 the *Oracle Receivables User Guide*.

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

2.7.1 Setting up Country Address Formats

In the Address Book, Oracle iStore can dynamically provide address information entry fields based on the user's country and perform address validation. Address information is stored in the TCA schema.

Note: Out-of-the-box, Address Validation is available only for U.S. addresses. For the country, U.S., Oracle iStore uses the **fixed** U.S. address format.

This country-based address formatting and validation depends on Oracle Receivables. For more information, see the **Flexible Addresses** topic in Chapter 3 of the *Oracle Receivable's User Guide*.

Use the following procedure to set up each country's address format in Oracle Receivables.

Prerequisites

None

Login

Oracle Forms

Responsibility

Receivables Manager responsibility

Steps

1. Log in to Oracle Forms with the Receivables Manager responsibility.
2. Choose **Setup > System > Countries**. The Countries and Territories window opens.
3. Search for the country for which you want to choose an address format as follows:
 - a. Choose **View > Query By Example > Enter**.
 - b. In the Country/Territory field of the Countries and Territories window, enter the name of the country for which you want to choose an address format.
 - c. Press **Ctrl + F11** to submit the query.

The Countries and Territories window is populated with the data for the country.

Note: Alternatively, you can choose **View > Find All** to populate the Countries and Territories window with data for every country.

4. In the Countries and Territories window, choose an address format from the country's Address Style list of values (LOV).
5. Save the form.

When a user enters an address in the Address Book, it displays the address style that you have set up for the user's selected country.

2.7.1.1 Oracle Trading Community Architecture

Oracle Trading Community (TCA) models and manages an electronic representation of the commercial community in which you do business. Oracle Trading Community includes:

- A comprehensive database schema also referred to as the Community Registry
- A set of PL SQL APIs for custom development
- Access integration with content providers
- A sophisticated set of data management utilities

For more information on TCA, visit [Oracle MetaLink](#); use keywords: TCA, Trading Community Architecture.

2.8 Setting up Oracle General Ledger

Oracle General Ledger (GL) provides business unit information to Oracle iStore.

The following are the types of tasks performed when setting up Oracle General Ledger:

- Define a chart of accounts.
- Define calendar periods.
 - **Note:** If you are implementing Oracle iStore Reports, then you must create a single calendar with the periods types: Day, Week, Month, Quarter, and Year, in order for the Reports to work.

Or, if you do not want to add all of these periods to the GL calendar, for reporting purposes you can create a separate calendar for iStore in GL with the required period types.
- Define and enable currencies.
- Define a set of books.
- 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 General Ledger User Guide* for information on how to perform these tasks.

2.8.1 Setting up Currencies

You can enable multiple currencies for your stores.

- See *Oracle General Ledger User Guide* for information about setting up multiple currencies.
- See [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#), for information on globalization and multiple organizations with Oracle iStore.

If you are planning to implement Oracle iStore **Reports** in a multiple currency integration, then you must set up daily currency conversion rates in Oracle General Ledger.

- See [Section 15.2.4, "Set Conversion Rates"](#), for instructions on how to set up currency conversion rates.

2.9 Setting up Oracle Human Resources

Oracle Human Resources Management System (HRMS) stores information related to your organization. Use HRMS to set up employees and bill-to and ship-to countries.

You must perform the following tasks when setting up HRMS:

- 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.

Note: The main integration point between HRMS and CRM is through the Resource Manager module of Oracle CRM Application Foundation. For example, there is a concurrent program to import HR people data into the Resource Manager module as resources. Also, sales representatives used in Oracle Quoting and Oracle Sales applications must be imported as resources in order to utilize these modules.

See the Resource Manager chapter of the *Oracle CRM Application Foundation Implementation Guide* and *Oracle CRM Application Foundation User Guide* for more information.

2.9.1 Setting up Bill to and Ship to Countries

Use the following procedure to set up bill-to and ship-to country information for any organization. The countries will appear in the Customer UI when a business-to-business (B2B) user creates new addresses.

- For more information on globalization and Oracle iStore, see [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#).

See *Using Oracle HRMS - The Fundamentals*, available on [Oracle MetaLink](#), for more information.

Prerequisites

At least one organization has been created.

Login

Oracle Forms

Responsibility

Human Resources responsibility

Steps

1. Log in to Oracle Forms as sysadmin and select 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. Check the **Enabled** checkbox.
6. Save changes.

7. Click the **Others** button. The Additional Organization Information window opens.
8. In the Additional Organization Information window, enter %Country in the Find field and click **Find**.
9. In the search results, choose **Bill to Country** and click **OK**. The Additional Organization Information window for Bill to Country opens.
10. Place your cursor in a **Bill to Country** field. The Bill to Country window opens.
11. 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 this value.

Search example: To find Germany, enter %ger% in the search box and click **Find**. This will return all countries whose descriptions include the letters ger.
 - 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.
12. 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.
13. To assign Ship to countries, follow Steps 4-9 above, substituting Ship to in place of Bill to.
- See *Using Oracle HRMS - The Fundamentals* for more information.

2.10 Setting up Oracle Inventory

Oracle Inventory serves as the repository of products that can be sold through Oracle iStore. Before you can create products in Oracle Inventory, you must set up and define the category structures within which products reside.

In addition, several Inventory flags need to be set in order for products to display in the Customer UI. See [Chapter 6, "Implementing Products"](#), for iStore-specific Inventory product setup details.

You also set up shipping methods in Oracle Inventory.

Refer to *Oracle Inventory User's Guide* for complete details of inventory setup. This guide is available on [Oracle MetaLink](#).

2.11 Setting up Oracle Order Management

Oracle iStore uses the Oracle Order Management suite of applications to:

- Process, record, and track customer orders and shipping details
- Set up basic pricing
- Set up payment and shipping options

Oracle Order Management integrates with Oracle iStore via Order Capture APIs and schema. Order information is communicated to Order Capture via the ASO_Update_Order API.

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.

Order Management (OM) in turn relies on:

- Oracle Receivables for keeping records of customers and invoices, and capturing payments upon shipments. Oracle Receivables is a mandatory dependency to Oracle iStore.
 - See [Section 2.7, "Setting up Oracle Receivables"](#), for more information.
- Oracle Order Capture APIs for collecting order information.
 - See *Oracle Order Capture API Reference Guide* for more details.
- Its own basic Pricing module for determining prices of goods sold, or Oracle Advanced Pricing, depending upon your configuration.
 - See [Chapter 9, "Implementing Pricing"](#), for more information.

- Its own Shipping module for setting up basic shipping methods, or, for advanced shipping functionality, Oracle Shipping Execution.
- See [Section 2.11.1, "Setting up Web-Enabled Shipping Methods"](#), for details on how to set up basic shipping methods.
- See [Chapter 29, "Integrating Oracle iStore with Oracle Shipping Execution"](#), for advanced shipping information.

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

This guide contains limited information on setting up and using Order Management. See the latest version of the following guides for more information:

- *Oracle Order Management Suite Implementation Manual*
- *Oracle Order Management Suite APIs and Open Interfaces Manual*

The guides referenced in this section are available on [Oracle MetaLink](#).

2.11.1 Setting up Web-Enabled Shipping Methods

You use Oracle Inventory to set up shipping methods. Refer to *Oracle Inventory User's Guide* for complete details of inventory setup.

After you have set up the shipping method lookups, you must flag them as web-enabled to use them in Oracle iStore's Customer UI.

Note: All shipping methods set up in Oracle Forms will display in the Store Administration UI. But only those shipping methods set as **web-enabled** will be available to customers in the Customer UI.

Use the following procedure to set the shipping methods as web-enabled.

Login

Oracle Forms

Responsibility

Order Management Super User responsibility

Steps

1. Log in to Oracle Forms with the Order Management Super User responsibility.

2. Choose **Shipping > Setup > Freight > Freight Carriers**.
 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 your changes.
 6. Bounce the Apache server after making these changes.
- See *Oracle Order Management Suite Implementation Manual* for complete information.

2.11.2 Setting up Pricing

- See [Chapter 9, "Implementing Pricing"](#), for instructions.

2.12 Setting up Oracle CRM Technology Foundation

You must implement Oracle CRM Technology Foundation as described in *Oracle CRM Technology Foundation Implementation Guide*. This guide is available on [Oracle MetaLink](#).

After this implementation, perform the Oracle iStore application setups listed in the following sections:

- [Section 2.12.0.1, "Host Configuration"](#)
- [Section 2.12.0.2, "Cookie Properties"](#)
- [Section 2.12.0.3, "Setting Look and Feel JTF Property"](#)
- [Section 2.12.0.4, "Component Caches"](#)

See *Oracle CRM Technology Foundation Concepts and Procedures* for complete instructions on how to perform these tasks.

2.12.0.1 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, include **iStore** in the host's deployed applications list.

2.12.0.2 Cookie Properties

The user session in Oracle iStore is controlled and identified by cookies. The cookies are set on the user's browser and identify return customers. The Oracle iStore 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 cookie 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, 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.

2.12.0.3 Setting Look and Feel JTF Property

Ensure that the Oracle Technology Foundation property (JTF/JTT) property **Look and feel.cabo** is set to **True**, either at the JTF/JFF application level or at the IBE application level.

Use the guidelines below to determine at which level the property should be set:

- **When to set at JTT/JTT application level** --- Set it at the JTT level if you are using only Oracle iStore, or if you are using Oracle iStore in combination with other Oracle applications which have **full Cabo Look and Feel** in their systems.
- **When to set at the IBE (iStore) application level** --- Set it at the iStore application level if you are using other Oracle applications which have **partial Cabo Look and Feel** in their systems.

Note: If you are unsure of the Cabo Look and Feel level in the applications you are using, then to be safe, set the property at the iStore application level.

The steps to set this property are:

1. Login as sysadmin to the Oracle E-Business Suite HTML Foundation login (JTF login).
2. Navigate to **Settings > System > Advanced**. The **Advanced - Properties** page appears.
3. To set the property at the **JTT/JTT** application level:
 - a. In the **View** droplist, select the Oracle CRM Technology Foundation application product code, **JTF**. (Press the **Update** button if necessary.)

- b. In the list that appears, select the hyperlink of the property, **LookAndFeel.cabo**.
 - c. In the **Key Details** page, enter the following values:

Key field = **LookAndFeel.cabo**

Value (Sequence 0) field = **true**
 - d. Click the **Update** button to save the changes.
4. To set the property at the **IBE** (Oracle iStore) application level:
 - a. In the **View** droplist, select iStore's product code, **IBE**. If IBE is not in the list, see [Adding IBE to the View Droplist](#), below.
 - b. Select the **Create** button.
 - c. In the **Create Key** page, enter the following values:

Key field = **LookAndFeel.cabo**

Value (Sequence 0) field = **true**
 - d. Click the **Update** button to save the changes.
5. When you are finished making the changes, log out of the sysadmin console, and log in as the iStore Administrator.
The Cabo Look and Feel should function properly.
6. Also, make sure the following directories are globally writable:
 - /OA_HTML/cabo/images/cache
 - /OA_HTML/cabo/styles/cache

Adding IBE to the View Droplist

If iStore's product code, **IBE**, is not shown in the **View** droplist in the **Advanced - Properties** page, do the following:

1. Navigate to **Settings > System > Category**. In the **Property Category** page, select the following:
 - **Application Name** droplist - select **iStore**
 - **Read/update** droplist - select **Update**
2. Select the **Next** button.

3. In the **Permission Role Mapping** page, move **JTF_SYSTEM_ADMIN_ROLE** from the **Available Roles** window to the **Assigned Roles** window.
4. Select the **Update** button to save the changes.

See the latest *Oracle CRM Technology Foundation Implementation Guide*, for more information. This guide is available on [Oracle MetaLink](#).

2.12.0.4 Component Caches

See [Section 17.3.1, "Component Caches for iStore in JTT"](#).

2.13 Dependency Verification

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

1. Verify that the ERP applications are installed and functioning properly.

Refer to the *Oracle CRM Application Foundation Implementation Verification Checklists Release 11i* (Part Number A97381-01). This document is available on [Oracle MetaLink](#).

2. 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*.

2.14 Optional Integrations with Oracle iStore

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

- [Oracle Advanced Pricing](#)
- [Oracle Advanced Supply Chain](#)
- [Oracle Bills of Material](#)
- [Oracle Call Center Technology](#)
- [Oracle Configurator](#)
- [Oracle Content Manager](#)
- [Oracle Customer Care](#)

- [Oracle iSupport](#)
- [Oracle Install Base](#)
- [Oracle Marketing](#)
- [Oracle Quoting](#)
- [Oracle Sales Applications](#)
- [Oracle Sales Contracts](#)
- [Oracle Shipping Execution](#)
- [Oracle Workflow](#)
- [Oracle9iAS Web Cache](#)

2.14.1 Oracle Advanced Pricing

Use Oracle Advanced Pricing to set up customer discounts, sourcing rules, pricing qualifiers, and pricing modifiers.

- See [Chapter 9, "Implementing Pricing"](#), for details.

2.14.2 Oracle Advanced Supply Chain

Use Oracle Advanced Supply Chain (Global ATP Server) to provide product availability information.

- See [Chapter 20, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#), for details.

2.14.3 Oracle Bills of Material

Use Oracle Bills of Material to set up configurable items, model bundles, and items with standard warranties for sale in your stores.

- See [Chapter 21, "Integrating Oracle iStore with Oracle Bills of Material"](#), for details.

2.14.4 Oracle Call Center Technology

Use the Oracle Call Center Technology (CCT) suite of applications to process call-me-back requests.

- See [Chapter 13, "Implementing Customer Assistance"](#), for more details.

2.14.5 Oracle Configurator

Use Oracle Configurator to enable customer configured products, provide guided selling, and perform some of the shopping cart validations.

- See [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#), for details.

2.14.6 Oracle Content Manager

Use Oracle Content Manager to provide a complete range of content item creation and management capabilities.

- See [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#), for details.

2.14.7 Oracle Customer Care

The Oracle Customer Care suite of applications provides a complete view of the customer by displaying relevant customer information. Customer Care allows agents to alter customer data and create interactions with the customer. It is comprised of the following modules: Contact Center, Relationship Plans, Customer Profile /Dashboard, and Critical Customer Management.

- See *Oracle Customer Care Implementation Guide* for details. This guide is available on [Oracle MetaLink](#).

2.14.8 Oracle iSupport

Use Oracle iSupport to provide self-service service request submission, order details views, return for credit authorizations, knowledge management, Install Base access, and user forums.

- See [Chapter 24, "Integrating Oracle iStore with Oracle iSupport Call-Me-Back Functionality"](#), for details.

2.14.9 Oracle Install Base

Use Oracle Install Base to maintain -- and allow customers to maintain -- a repository of purchase information, including purchase date, product attributes, and applicable service agreements. Oracle Install Base maintains information about purchased products in a tree structure showing all of the parent and child assemblies. See *Oracle Install Base Implementation Guide* for details. This guide is available on [Oracle MetaLink](#).

2.14.10 Oracle Marketing

Use Oracle Marketing to create and maintain products; define, execute, and manage marketing campaigns; and to track user events.

- See [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), for details.

2.14.11 Oracle Quoting

Use Oracle Quoting to create quotes that can be published to Oracle iStore web stores and to capture carts as quotes when users request Sales Assistance.

- See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for details.

2.14.12 Oracle Sales Applications

Use Oracle Sales Online and Oracle TeleSales to import sales leads from Oracle iStore orders and expired shopping carts.

- For more information on the Lead Import functionality of Oracle iStore, see [Chapter 27, "Integrating Oracle iStore with Oracle Sales Applications"](#).

2.14.13 Oracle Sales Contracts

Use Oracle Sales Contracts for complete contract management and service agreements.

- See [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#), for details.

2.14.14 Oracle Shipping Execution

Use the Order Management module, Oracle Shipping Execution (SE), to calculate shipping charges, and to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing.

The Oracle Shipping Execution module must be in place to enable post-order tracking and shipping detail views in Oracle iStore.

- See [Chapter 29, "Integrating Oracle iStore with Oracle Shipping Execution"](#), for details.

2.14.15 Oracle Workflow

Use Oracle Workflow to send e-mail notifications and confirmations to customers and sales representatives.

- See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), for details.

2.14.16 Oracle9iAS Web Cache

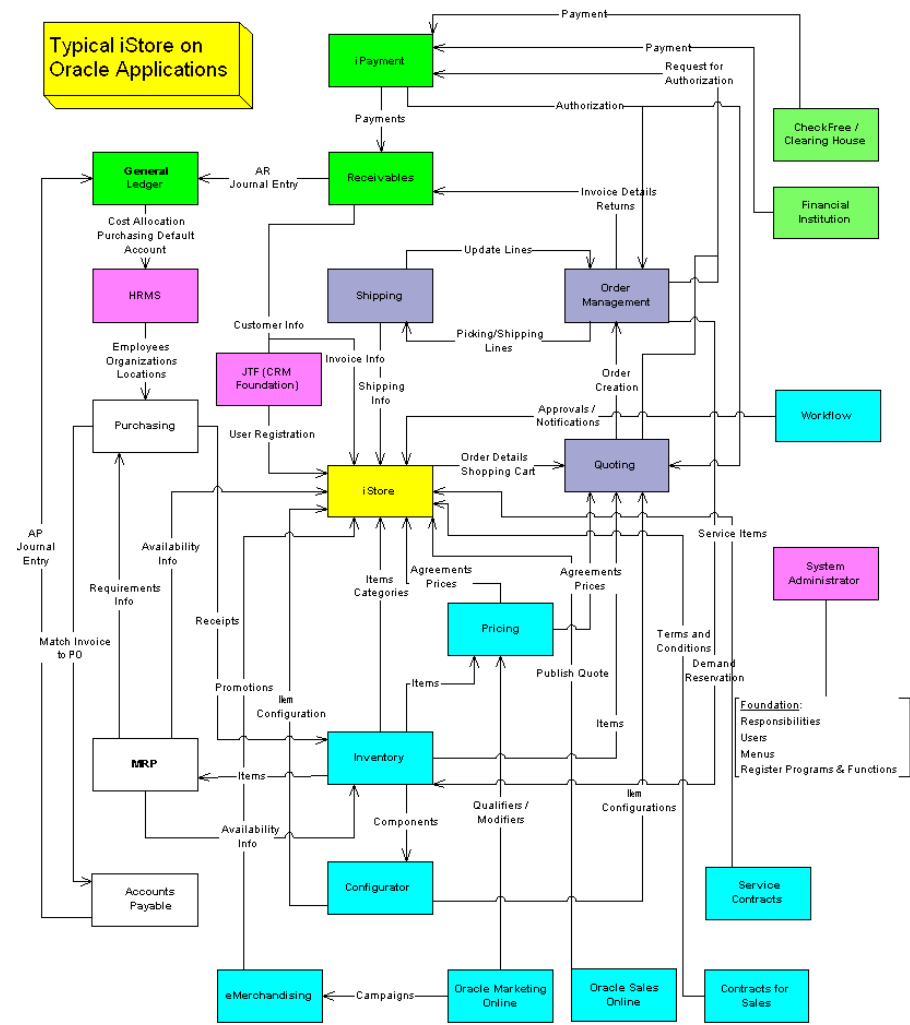
Use Oracle9iAS Web Cache to serve the non-transactional Oracle iStore content.

- See [Chapter 30, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), for details.

2.15 Oracle iStore Example Integrations Diagram

The following diagram shows some of the possible integrations with Oracle products.

Figure 2–1 Oracle iStore Example Integrations



Part II

Implementing Oracle iStore 11i

This part describes the tasks required for a successful implementation of Oracle iStore 11*i* after you have installed the dependent applications discussed in [Chapter 2, "Before You Begin"](#).

This part contains the following chapters:

- [Chapter 3, "Implementation Overview"](#)
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#)

Implementation Overview

This chapter provides an overview of required and optional setups with Oracle iStore 11*i*, after you have verified your installation and dependencies in [Chapter 2, "Before You Begin"](#). Topics include:

- [Implementation Process Description](#)
- [Required Implementation Tasks](#)
- [Implementation Tasks Process Flow](#)
- [Advanced Tasks and Optional Integrations](#)

3.1 Implementation Process Description

Now that you have installed the mandatory dependencies to Oracle iStore, as described in [Chapter 2, "Before You Begin"](#), you can begin setting up your online stores.

The steps required are:

1. Set up the Store Administration UI.
2. Create a basic store.
3. Set up the Customer UI.
4. Test the store.

In addition to the required setup steps, you can customize and add functionality as desired by performing the setup tasks described in [Part III, "Advanced Implementation Tasks"](#), and by implementing other Oracle Applications modules that are conditional dependencies for Oracle iStore as described in [Part V, "Integration of Oracle Products"](#).

3.2 Required Implementation Tasks

The following table, [Table 3–1, "Required Implementation Tasks"](#), lists the required implementation steps for getting a basic store up and running.

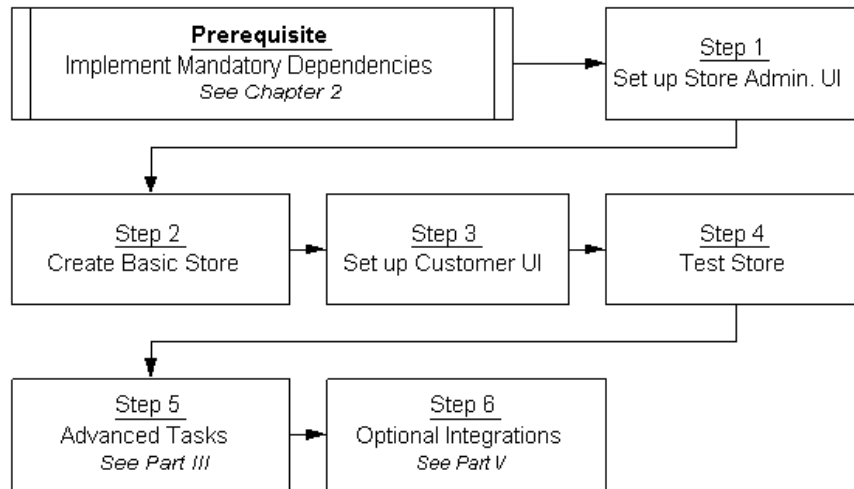
Note: If you are viewing this document in either HTML or PDF format, the items in the Reference column of the following table are hyperlinks which will take you to the section referenced.

Table 3–1 Required Implementation Tasks

Task	Reference
<i>Mandatory Dependencies have been implemented.</i>	Chapter 2, "Before You Begin"
1) Set up the Store Administration UI	Section 4.1, "Setting up the Store Administration UI"
2) Create Basic Store	Section 4.2, "Creating Stores"
3) Set up Customer UI	Section 4.3, "Setting up the Customer UI"
4) Test Store	Section 18.1.1, "Testing the Stores"

3.3 Implementation Tasks Process Flow

The diagram below is a graphical representation of the tasks described in [Table 3–1, "Required Implementation Tasks"](#).

Figure 3–1 Oracle iStore Implementation Tasks

These setups begin in the next chapter, [Chapter 4, "Implementation Tasks for Oracle iStore"](#).

3.4 Advanced Tasks and Optional Integrations

After you have created a basic store, refer to [Part III, "Advanced Implementation Tasks"](#), for details of expanding your implementation.

For a discussion of optional integrations, see the following:

- [Section 2.14, "Optional Integrations with Oracle iStore"](#)
- [Section 2.15, "Oracle iStore Example Integrations Diagram"](#)

Specific setup details for the individual, optional integrations can be found in [Part III, "Advanced Implementation Tasks"](#).

Implementation Tasks for Oracle iStore

This chapter describes the tasks required to set up Oracle iStore 11*i* after you have verified your installation and dependencies in [Chapter 2, "Before You Begin"](#).

Topics include:

- [Setting up the Store Administration UI](#)
- [Creating Stores](#)
- [Setting up the Customer UI](#)
- [Testing Stores](#)

Note: Both the Store Administration and Customer user interfaces offer the Oracle BLAF (browser look and feel) compliant user interfaces (UI). The Oracle BLAF UI provides consistent look and feel and similar task flows across the Oracle E-Business Suite applications.

4.1 Setting up the Store Administration UI

Your initial setup of the Oracle iStore Store Administration UI involves setting required profile options, creating administrative users, and testing the Store Administration UI.

Required tasks include:

1. [Set Initial Profile Options](#)
2. [Set up Administrators](#)
3. [Launch the Store Administration UI](#)

4.1.1 Set Initial Profile Options

Set up by the System Administrator in Oracle Applications (Forms), profile options control the behavior of all Oracle Applications. Nearly every Oracle Applications profile option begins with a 2- or 3-letter code that is tied to the application or functionality group which it controls.

All Oracle iStore profile options begin with the prefix **IBE**.

Initially, you must set some Oracle CRM Technology Foundation (JTT) and Oracle iStore (IBE) profile options to enable Oracle iStore's Store Administration UI. These profile options must be set before the Store Administration UI can be launched.

This section includes:

- [Section 4.1.1.1, "Set CRM Technology Foundation Profile Options"](#)
- [Section 4.1.1.2, "Set iStore Store Administration UI Profile Options"](#)
- [Section 4.1.1.3, "Set Multi-Org Profile Options"](#)

[Appendix A, "Profile Options"](#), contains detailed lists of all IBE profile options.

See [Section A.2, "How to Set Profile Options"](#) for general instructions on how to set profile options in Oracle Applications.

- For more information about Oracle Applications profile options in general, see *Oracle Applications System Administrator's Guide*.

4.1.1.1 Set CRM Technology Foundation Profile Options

The following Oracle CRM Technology Foundation profile options must be set at the *site* level and *application* level to **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.3, "Oracle CRM Technology Foundation Profile Options"](#), for profile option descriptions and values.

4.1.1.2 Set iStore Store Administration UI Profile Options

Before the Store Administration UI will display, you must set the following Oracle iStore (IBE) profile options at the application level to **iStore**:

- **IBE: Category Set**
- **IBE: Item Validation Organization**
- **AMS: Item Validation Inventory Organization**
- **IBE: Use Display Order Feature** (optional)

See [Section A.5, "Store Administration UI Setup Profile Options"](#), for profile option descriptions and values.

4.1.1.3 Set Multi-Org Profile Options

For multiple-organization architecture, set and/or verify the setting of the profile option, **MO: Operating Unit**.

See:

- [Section 16.3, "Implementing Globalization with Oracle iStore"](#)
- [Section A.8, "Multiple Organization Profile Options"](#)
- *Multiple Organizations in Oracle Applications*, Part No. A81174-02.

To find this manual, visit [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and search for the part number listed above. Or, navigate to Top Tech Docs > E-Business Suite: ERP > Applications Core Technology > Multiple Organizations Architecture > Manuals and eTRMs > Architecture section.

4.1.2 Set up Administrators

You must create a store administrator (store manager) who will set up and test the stores in the Store Administration UI. See [Section 4.1.2.1, "Set up iStore Administrator \(Manager\)"](#) for details.

You also must create a concurrent programs administrator who will run concurrent programs. Initiated through Oracle Forms, concurrent programs are system programs that refresh certain data in the database. See [Section 4.1.2.2, "Set up Concurrent Program Administrator"](#) for details.

For information on all Oracle iStore concurrent programs, see [Appendix B, "Concurrent Programs"](#).

This section includes:

- [Section 4.1.2.1, "Set up iStore Administrator \(Manager\)"](#)
- [Section 4.1.2.2, "Set up Concurrent Program Administrator"](#)

When the store manager logs in to the Oracle E-Business Suite HTML login page at: `http://<host>:<port>/OA_HTML/jtfllogin.jsp`, the Oracle iStore Store Administration UI opens.

Both the iStore Administrator and iStore Concurrent Program responsibilities are seeded (supplied) in Oracle iStore. The users receive all the required menus and privileges to manage the store and run concurrent programs through these responsibilities.

The menu assigned to the iStore Administrator responsibility is called **iStore Merchant Root** (IBE_M_MENU_ROOT).

4.1.2.1 Set up iStore Administrator (Manager)

Use the following procedure to set up a user account for an Oracle iStore store administrator.

Prerequisites

None

Login

Oracle Forms

Responsibility

System Administrator

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 Store Administration UI. An example is `IBE_ADMIN`.
4. In the Password field, enter the store administrator's password.
5. In the Responsibilities block, choose **iStore Administrator** (key = `IBE_ADMINISTRATOR`) from the Responsibility LOV.
6. Save the user record.

7. Set the following profile options at the **user** level for this store administrator:

- **JTF_PROFILE_DEFAULT_APPLICATION**
- **JTF_PROFILE_DEFAULT_RESPONSIBILITY**

See [Section A.3.2, "Foundation Profile Options for Store Administrator \(Manager\) User Accounts"](#), for profile option descriptions and values.

See [Section A.2, "How to Set Profile Options"](#), for general instructions on how to set profile options in Oracle Applications.

4.1.2.2 Set up Concurrent Program Administrator

Concurrent programs populate database tables with fresh information from Oracle Applications. This guide's concurrent program information is contained both within individual chapters and consolidated in [Appendix B, "Concurrent Programs"](#).

You must either add the concurrent program responsibility to the iStore administrator created above, or create a new user with the concurrent programs responsibility. Both methods work --- which avenue you take depends upon your business needs.

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

Prerequisites

None

Login

Oracle Forms

Responsibility

System Administrator

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 the **Responsibility LOV**.
6. Save the user record.
7. Set the Concurrent Manager profile options listed in [Section A.4, "Concurrent Program Manager Profile Options"](#).

Important: Set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.

4.1.3 Launch the Store Administration UI

All store creation tasks are performed in the Store Administration UI. You can enter the Store Administration UI by logging in to:

http://<host>:<port>/OA HTML/jtflogin.jsp

with a user name that the system administrator has set up as an Oracle iStore store manager user account. See [Section 4.1.2, "Set up Administrators"](#) for more information on creating a store manager user account.

Enable Cookies for the Store Administration UI

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

Accessing the Merchant Administrator's Profile Pages

On any page of the Store Administration UI, the merchant administrator can click the **Profile** icon to access his Oracle CRM Technology Foundation user profile page. Use the Profile pages to update personal information and set preferences.

- See *Oracle CRM Technology Foundation User Guide* for more information.

Modifying Merchant Functions

If you need to modify the functions that the store manager 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 functions. All Oracle iStore 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.

4.2 Creating Stores

This section provides an overview of store creation and steps to create a basic store. Sections include:

- [Section 4.2.1, "Stores Overview"](#)
- [Section 4.2.2, "Creating a Store"](#)

After you have set up a basic store, see the following sections of this guide to continue your implementation:

- [Chapter 5, "Implementing Initial Customer UI Pages"](#)
- [Chapter 6, "Implementing Products"](#)
- [Chapter 7, "Implementing Customer UI Catalog"](#)
- [Chapter 8, "Implementing Customer UI Display"](#)
- [Chapter 9, "Implementing Pricing"](#)
- [Chapter 10, "Implementing Payment Types and Shipping Methods"](#)
- [Chapter 11, "Implementing Carts and Orders"](#)
- [Chapter 12, "Implementing Users and Registration"](#)

4.2.1 Stores Overview

In the context of Oracle iStore, a *store* is any store that the store administrator (manager) creates using the Oracle iStore Store Administration UI. When you initially create a store in the Oracle iStore Store Administration UI, it is considered a *store* (also called a minisite) and is uniquely identified by a numerical code, called the Store ID (also called Minisite ID).

After you map a store to an iStore customer responsibility and save it, you have created a *specialty store*. In the Customer UI, specialty stores are available to users based on the responsibility associated with their usernames.

For example, if you create a store called Store 1, and then you add the IBE_CUSTOMER responsibility to it and save it, a specialty store it created. In the Store Administration UI Responsibility pages, you give the specialty store a name, such as Toy Store. Only users who have the IBE_CUSTOMER responsibility associated with their usernames will be able to place orders in the Toy Store. If you have set up the store to accept guest (walk-in) users, then guest users will be able to browse the Toy Store, but will not be able to place orders. Each time you add an iStore customer responsibility to a store and save it, you create a specialty store for the Customer UI.

You can create as many stores and specialty stores as you wish, all within a single instance. Additionally, you can implement stores which support multiple languages and currencies. Each store can have multiple payment types and shipping methods enabled.

Basic Facts About Responsibilities and the Oracle iStore Customer UI

- Each store supports any number of Oracle iStore responsibilities. However, you can not use the same responsibility more than once per store. For example, for Store 1, you can add IBE_CUSTOMER responsibility to that store only once. To use the IBE_CUSTOMER responsibility again, you will need to create another store.

Note: It is strongly recommended that you use one responsibility (and thus one specialty store) per store.

- Only Oracle iStore responsibilities are supported for use in your stores. Any non-iStore (IBE) responsibilities mapped to a store will be ignored.
- A combination of one store plus one responsibility makes a *specialty store* in the Customer UI.
- Each specialty store supports only one responsibility.
- Each user who signs in to the Customer UI must do so with a responsibility associated with his username.
- The responsibility with which a user logs into the Customer UI determines the operating unit against which any orders are placed.

- Customer UI responsibilities are seeded for the default customer user. This responsibility name is IBE_CUSTOMER.

The default Customer UI landing page is called the **Specialty Store Page**. It displays all specialty stores that are accessible to the responsibility of the user viewing them. Stores that do not allow guest users will display an asterisk (*).

If the customer can only access one specialty store, iStore automatically forwards the user to the Home Page of the accessible specialty store, and the user does not see the list of specialty stores.

For more information on configuring the Customer UI landing pages, see [Chapter 5, "Implementing Initial Customer UI Pages"](#).

4.2.2 Creating a Store

This section details store creation steps. See [Part III, "Advanced Implementation Tasks"](#), and [Part V, "Integration of Oracle Products"](#), for details on how to implement additional features.

Topics in this section include:

- [Section 4.2.2.1, "Create a Store: Getting Started and Entering Basic Information"](#)
- [Section 4.2.2.2, "Create a Store: Assigning Languages"](#)
- [Section 4.2.2.3, "Create a Store: Assigning Currencies"](#)
- [Section 4.2.2.4, "Create a Store: Assigning Price Lists"](#)
- [Section 4.2.2.5, "Create a Store: Setting Maximum Orderable Amount for a Currency"](#)
- [Section 4.2.2.6, "Create a Store: Assigning Payment Types"](#)
- [Section 4.2.2.7, "Create a Store: Assigning Shipping Methods"](#)
- [Section 4.2.2.8, "Create a Store: Assigning Responsibilities \(Creating Specialty Stores\)"](#)
- [Section 4.2.2.9, "Create a Store: Manually Ordering Specialty Store Display Names"](#)
- [Section 4.2.2.10, "Create a Store: Setting Organization Access Restrictions"](#)
- [Section 4.2.2.11, "Create a Store: Setting Payment Threshold"](#)

Prerequisites

- Perform the implementation tasks outlined in [Section 2.2.2, "Mandatory Dependency Implementation Steps"](#).
- Set up price lists. See [Section 9.3.1, "Set up Basic Price List"](#), for instructions.
- Perform the implementation tasks prior to this step, beginning in [Section 4.1, "Setting up the Store Administration UI"](#).

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Note: Any time you create a store or add a responsibility to it, you should bounce the Apache server.

4.2.2.1 Create a Store: Getting Started and Entering Basic Information

In this section, you begin the store creation process and enter basic information for a store, such as name and description, as well as select the default language for the store.

Note: To remove a store from operation, you must end-date it.

Steps

1. Launch the Store Administration UI by logging in as a user with a valid Oracle iStore administrator (manager) responsibility and password. See [Section 4.1.2.1, "Set up iStore Administrator \(Manager\)"](#), for more information.

Example: Log in as IBE_ADMIN

2. In the default landing page, **Stores**, select the **Create a Store** button. The **Create Store** page opens, where you can enter basic information for a store, as described in the following steps.
3. **Store Name** --- Enter a name for the store in the textbox. This should be your company's internal name by which the store is known.

Example: Company Computer Store

4. **Store Code** --- Store code functionality is **reserved for future use**. Currently, any value you enter here would be used for your company's own internal purposes.
5. **Description** --- Enter a description for the store. You can enter this at a later time if you wish.

Example: This store is for my company's online computer sales.

6. **Start Date** --- Use the calendar icon to select the date when the specialty stores of this store should first be active and available to customers in the Customer UI. This will default to system date.

The start date of a specialty store can also be controlled by setting the supported responsibility (specialty store) start date -- see: [Section 4.2.2.8, "Create a Store: Assigning Responsibilities \(Creating Specialty Stores\)"](#).

7. **End Date** --- Optionally, use the calendar icon to select the date the specialty stores of this store should no longer be active and available to customers in the Customer UI.

To remove a store from operation, end-date it.

The end date of a specialty store can also be controlled by setting the supported responsibility end date -- see: [Section 4.2.2.8, "Create a Store: Assigning Responsibilities \(Creating Specialty Stores\)"](#).

8. **Default Language** --- This textbox will display the current default language for the store.

To select a different default language: Select the flashlight icon to launch the **Select: Languages** page, where you can select from a list of installed languages.

This step is expanded in [Section 4.2.2.2, "Create a Store: Assigning Languages"](#).

Except for the default language known as the *base language*, languages must first be installed and then set up in Oracle Applications before they appear in the Store Administration UI. **See:** [Section 2.5, "Multi-Language Setup \(MLS\)"](#).

9. **Default Currency** --- Select a default currency for the store. This is a mandatory field. The default currency can be changed using the store **Pricing** page.

Select the flashlight icon to launch the **Search and Select: Currencies** page, where you can select from a list of implemented currencies.

This step is expanded in [Section 4.2.2.3, "Create a Store: Assigning Currencies"](#).

Currencies are set up during implementation of Oracle General Ledger. Until they are set up, currencies will not appear in the Store Administration UI. See: [Section 2.8, "Setting up Oracle General Ledger"](#).

10. **Default Walk-in Price List** --- Select a default price list for walk-in (guest) users of the store. This is a mandatory field. The price list assignment can be changed using the store **Pricing** page.

Use the flashlight icon to launch the **Search and Select: Price Lists** page, where you can select from a list of implemented price lists within your organization.

This step is expanded in [Section 4.2.2.4, "Create a Store: Assigning Price Lists"](#).

11. **Catalog Root Section** --- In this step, you select the parent node (or browsing section) under which this store resides. This is a mandatory field.

Use the flashlight icon to launch the **Search and Select: Sections** page, where you can select a parent section for the store.

The default parent section also can be changed using the **Update Store: Details** page.

For more information on working with sections, see: [Section 7.4, "Creating and Maintaining Sections"](#).

12. **Allow un-registered users to browse the store** --- Select this checkbox to allow **unregistered users** (also called guest users and walk-in users) to navigate within this store's specialty stores.

Guest users cannot place orders, but can add items to the shopping cart. Specialty stores which do not allow unregistered users will display an asterisk (*) near their display names in the Customer UI.

13. **Allow customers to check item availability** --- Select this checkbox to allow users to check Available to Promise (ATP) information for products. Do not select this unless you have set up either Regular or Global ATP.

For more information on Regular ATP: See [Section 6.4, "Providing Regular Available to Promise \(ATP\)"](#).

For more information on Global ATP: See [Section 20.2.1, "Setting up Global Available to Promise \(ATP\)"](#).

14. **Restrict customer access by responsibility** --- Select this checkbox to make all specialty stores within this store check user responsibility when customers enter the specialty store. If you select this, then specialty stores within this store will

only grant access to those users whose responsibilities are supported by the specialty store.

15. **Enable Threshold for Payment Types** --- Select this checkbox to enable the Payment Threshold feature in all specialty stores within this store. This feature allows you to set a monetary amount and then select which payment types can be used when users place orders below that amount.

More details can be found in [Section 4.2.2.11, "Create a Store: Setting Payment Threshold"](#).

16. Select **Apply** to save changes.

Note: Upon creation, your store will be given a unique number, which you can view in the **Store ID** field in the **Update Store: Details** page. The **Store ID** is the same as the Minisite ID.

17. Continue creating your store using the following sections:

- [Section 4.2.2.2, "Create a Store: Assigning Languages"](#)
- [Section 4.2.2.3, "Create a Store: Assigning Currencies"](#)
- [Section 4.2.2.4, "Create a Store: Assigning Price Lists"](#)
- [Section 4.2.2.5, "Create a Store: Setting Maximum Orderable Amount for a Currency"](#)
- [Section 4.2.2.6, "Create a Store: Assigning Payment Types"](#)
- [Section 4.2.2.7, "Create a Store: Assigning Shipping Methods"](#)
- [Section 4.2.2.8, "Create a Store: Assigning Responsibilities \(Creating Specialty Stores\)"](#)
- [Section 4.2.2.9, "Create a Store: Manually Ordering Specialty Store Display Names"](#)
- [Section 4.2.2.10, "Create a Store: Setting Organization Access Restrictions"](#)
- [Section 4.2.2.11, "Create a Store: Setting Payment Threshold"](#)

4.2.2.2 Create a Store: Assigning Languages

In this section, you select additional languages for the store. This is optional. To enable additional languages, you must first install and then set up the languages in Oracle Applications. In addition, your implementation must be multi-org enabled.

See: [Section 16.3, "Implementing Globalization with Oracle iStore"](#).

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button next to the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Language** hyperlink. The **Languages** page will display a list of languages currently supported by the store.
5. To add a language, select the **Add Language** button. This will launch the **Select: Languages** page, where you can choose additional, previously-installed languages.

4.2.2.3 Create a Store: Assigning Currencies

In this section, you select currencies for the store. Currencies must be set up in Oracle General Ledger before they can be selected in the Store Administration UI.

See: [Section 2.8.1, "Setting up Currencies"](#)

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Pricing** hyperlink. The **Pricing** page will appear. Currencies supported by the store display in the Pricing page.

The **Pricing** page shows and allows selection of currencies, price lists, maximum orderable amounts, and payment thresholds for a store.
5. To add a currency, select the **Add Currency** button.
6. In the **Search and Select: Currencies** page that appears, select the appropriate currencies.

Optionally, use the search utility to search for currencies by **Currency Name** or **Currency Code**. You may use % as a wildcard character. Press **Enter** or select the **Go** button to engage the search.

Add a currency by activating its radio button in the **Select** column and pressing the **Apply** button.

Note: The currency selection **will not be saved** to the database until corresponding price lists are selected and saved.

4.2.2.4 Create a Store: Assigning Price Lists

In this section, you select price lists for the store.

Price lists must be set up in Oracle Order Management Basic Pricing module or Oracle Advanced Pricing before they can be selected in the Store Administration UI.

See: [Section 9.3.1, "Set up Basic Price List"](#).

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Pricing** hyperlink. The Pricing page appears. The **Pricing** page shows and allows update of all currencies, price lists, maximum orderable amounts, and payment thresholds associated with a store.
5. For each supported currency, choose the price lists for **Walk-in Customers** (guest users), **Individual Customers** (B2C users), and **Business Customers** (B2B users).

Use the flashlight icons to search and select price lists.

6. In the **Search and Select: Price Lists** page that appears, select the appropriate price lists.

Optionally, use the search utility to search for price lists by **Currency Code** associated to a price list, **Price List Name**, or **Price List Description**. You may use % as a wildcard character. Press **Enter** or select the **Go** button to engage the search.

Select a price list by activating a radio button in the **Select** column and pressing the **Select** button.

7. When you have returned to the **Pricing** page, select the **Apply** button to save changes. The currencies and price list selections are now saved to the database.
8. Optionally, to remove a currency/price lists combination, select the appropriate **Remove** icon in the **Pricing** page. You cannot remove the default currency.

4.2.2.5 Create a Store: Setting Maximum Orderable Amount for a Currency

In this section, you set the maximum orderable amount for a currency. Any order placed over this maximum orderable amount in the applicable currency will error. Setting maximum orderable amounts is optional.

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Pricing** hyperlink.

The **Pricing** page shows all currencies, price lists, maximum orderable amounts, and payment thresholds associated with a store.

5. For each currency, in the **Maximum Amount** textbox, enter a monetary amount in whole numbers.

For example, to set the maximum orderable amount for a currency to one thousand dollars, enter 1000 in the textbox.

6. Press the **Apply** button to save changes.

4.2.2.6 Create a Store: Assigning Payment Types

In this section, you select the payment types that the store will support. Payment types must first be set up in Oracle Applications before they can be selected in the Store Administration UI.

See: [Chapter 10, "Implementing Payment Types and Shipping Methods"](#).

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Payment** hyperlink. The **Payment Types** page appears, showing all payment types supported by this store.
5. To add payment types, select the **Add Payment Type** button. The **Select: Payment Types** page appears.

6. In the **Select: Payment Types** page, select the payment types you wish this store to support.

Press the **Select** button to add the payment type(s) to the store.

7. When you have returned to the **Payment Types** page, select the **Apply** button to save changes.
8. Optionally, enable or disable the following checkboxes:
 - **Ask for Purchase Order** --- If checked, users can enter purchase order numbers during checkout for this store. This enables the Purchase Order textbox in the checkout pages.
 - **Use Purchase Order when Below Payment Threshold** --- This enables the purchase order textbox for orders that are below the payment threshold specified. If left unchecked and the order amount is below the payment threshold specified, the purchase order textbox will not display, even if the **Ask for Purchase Order** checkbox is checked.

4.2.2.7 Create a Store: Assigning Shipping Methods

In this section, you assign the shipping methods supported by the store. Shipping methods must be set up before they will display in the Store Administration UI. Only the shipping methods supported by a store will display in the Customer UI.

See: [Chapter 10, "Implementing Payment Types and Shipping Methods"](#).

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Shipping** hyperlink. The **Shipping Methods** page appears, displaying all supported shipping methods for this store.
5. To add a shipping method, select the **Add Shipping Method** button. The **Select: Shipping Methods** page appears.
6. In the **Select: Shipping Methods** page, select the shipping methods you wish this store to support.

Press the **Select** button to add the shipping methods to the store.

4.2.2.8 Create a Store: Assigning Responsibilities (Creating Specialty Stores)

You must assign at least one Oracle iStore customer responsibility to a store. Each iteration of a store plus a responsibility makes a specialty store. The display names you select in this phase of the store building process appear in the Customer UI as the specialty stores' display names.

Oracle iStore ships with a default responsibility for the Customer UI. This responsibility is **IBE_CUSTOMER**. When you create a store, Oracle iStore automatically maps this responsibility to the store. If you wish, this responsibility assignment can be removed in the Responsibilities page.

Note: Only iStore (**IBE**) responsibilities are supported for use in your stores. Specialty stores created with any non-iStore application responsibilities (for example, using previous versions of iStore) will be ignored.

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Responsibility** hyperlink. The **Supported Responsibilities** page displays.
5. If you have not removed it, the default customer responsibility, **IBE_CUSTOMER**, will be mapped to the store.
 - a. To remove the default customer responsibility assignment, select the **Remove** icon in the table row.
 - b. To use the default customer responsibility but select a new display name for the specialty store, enter the display name in the **Store Display Name** textbox and press **Apply** to save the change.
6. To map a new responsibility to the store, select the **Add Responsibility** button. The **Search and Select: Responsibility** page opens.
7. In the **Search and Select: Responsibility** page, search for and select responsibilities.

Optionally, use the search utility to search for iStore responsibilities in the database. You can search by **Responsibility Name**, **Responsibility Key**, or **Responsibility Description**. You may use % as a wildcard character. Press **Enter** or select the **Go** button to engage the search.

Check the **Select** checkbox next to the desired responsibility, and press the **Select** button to add the responsibility to the store.

Note: You can only use a single responsibility once per store.

8. **Enter Display Names** ---- In the **Responsibilities** page, in the **Store Display Name** field, enter the specialty store display name for each specialty store (store-responsibility combination) in the Customer UI.

Important: If you do not change the **Display Name** field for each supported responsibility, then the Customer UI will display the responsibility name (e.g., IBE_CUSTOMER) instead of a store name. However, if you do forget to enter a user-friendly display name here, you can edit it later by returning to this screen.

9. **Enter Effective Dates** ---- In the **Start Date** and **End Date** fields, enter the dates when the store will support each responsibility you have added.
10. Press the **Apply** button to save changes.

4.2.2.9 Create a Store: Manually Ordering Specialty Store Display Names

In this section, you manually re-order the display order of the specialty stores across all stores in your organization's implementation.

Important: You can only manually order specialty store names if you set the profile option, **IBE: Use Display Order Feature**, to **Yes** at the iStore application level. Otherwise, specialty stores will be arranged in case-insensitive, alphabetical order at runtime in the Customer UI.

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Responsibility** hyperlink. The **Supported Responsibilities** page displays.
5. Select the **Display Order** button. The **Display Order** page opens.
6. In the shuttle window, all specialty stores across all stores will display. Select specialty store names with your mouse and then use the **up** and **down** arrows to order the names.
7. Press the **Apply** button to save changes.

4.2.2.10 Create a Store: Setting Organization Access Restrictions

In this section, you set access restrictions based on users' organizations. Using access restrictions is optional. Any restrictions you map in the Access Restrictions pages apply only to business users (B2B) associated with one of the organizations set up in the Access Restrictions pages.

When you use access restrictions, you do one of the following:

- Restrict access to a store based on users' organization(s) affiliation.
- Allow only users from a certain organization(s) to access a store.

Steps

1. Log into the Store Administration UI and select the **Stores** tab. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the left area of the screen, select the **Access** hyperlink. The **Access Restrictions** page opens.
5. Select the appropriate radio button:
 - **No restriction:** Select this radio button to have no organization-related access restrictions on the store.
 - **Exclude the following organizations:** Select this radio button to restrict access to the store by users associated with the organization(s) you specify.
 - **Include the following organizations:** Select this radio button to allow access to the store only by users associated with the organization(s) you specify.
6. To add an organization to the list, select the **Add Organization** button. The **Search and Select: Organization** page appears.
7. In the **Search and Select: Organization** page, check the **Select** checkbox next to the organizations you want to add to the list, and press the **Select** button add the organization(s).

Optionally, use the search utility to search for organizations by **Organization Name** or **Account Number**. Use the percent sign (%) as a wildcard character if necessary. Press **Enter** or select the **Go** button to engage the search.

8. When you have returned to the **Access Restrictions** page, save changes by pressing the **Apply** button. Remember to check that the appropriate **access restriction radio button** is selected at the top of the page.
9. In the **Start Date** field, use the calendar icon to set the start date for the access restriction.
10. Optionally, enter an **End Date** using the calendar icon.
11. Press the **Apply** button to save changes.

4.2.2.11 Create a Store: Setting Payment Threshold

In this section, you set the payment threshold for a currency. Payment Threshold functionality allows you to enable only certain payment types in your specialty stores, if the user places an order whose amount is under the threshold amount.

See: [Section 10.7, "Setting up a Threshold for Payment Types"](#)

Steps

1. Log into the Store Administration UI. The **Stores** page displays, showing a list of all stores in your organization's implementation.
2. In the **Stores** page, select the radio button of the store you wish to modify.
3. Select the **Update** button. The **Update Store: Details** page appears.
4. In the **Update Store** page, ensure that the **Enable Threshold for Payment Types** checkbox is active.
5. Navigate to the **Pricing** page by selecting the **Pricing** hyperlink.
The **Pricing** page shows all currencies, price lists, maximum orderable amounts, and payment thresholds associated with a store.
6. For each supported currency, enter a monetary amount, in whole numbers, in the **Payment Threshold** textbox.
When a user attempts to place an order whose amount is below this amount, Oracle iStore will display only the payment types whose **Payment Threshold** checkbox is active (see the next step, below).
7. Navigate to the **Payment Types** page by selecting the **Payment** hyperlink: In the **Update Store** page, select the **Payment** hyperlink. The Payment Types page will display all payment types currently supported by the store.
8. To enable the payment threshold functionality for a payment type, select the **Use Below Payment Threshold** checkbox next to the payment type in the table.

Press the **Apply** button to save changes.

9. Optionally, enable or disable the following checkboxes:
 - **Ask for Purchase Order** --- If checked, users can enter purchase order numbers during checkout for this store. This enables the Purchase Order textbox in the checkout pages.
 - **Use Purchase Order when Below Payment Threshold** --- This enables the purchase order textbox for orders that are below the payment threshold specified. If left unchecked and the order amount is below the payment threshold specified, the purchase order textbox will not display, even if the **Ask for Purchase Order** checkbox is checked.
10. Press the **Apply** button to save changes.

4.3 Setting up the Customer UI

The Oracle iStore *Customer UI* refers to the web pages accessed by customers of your Internet stores from the initial landing page through checkout.

User registration is enabled by default in your stores, but can be disabled by setting certain profile options.

- For options on disabling registration for certain types of users, see [Chapter 12, "Implementing Users and Registration"](#).

The page that displays when customers visit your store is controlled by specific combinations of profile options. You do not need to change these profile options for users to access your stores.

- For information on customer landing page options, see [Chapter 5, "Implementing Initial Customer UI Pages"](#).

The basic setup for enabling the Customer UI includes:

- [Section 4.3.1, "Set up Guest User Access"](#)
- [Section 4.3.2, "Verify the Guest User Account"](#)
- [Section 4.3.3, "Set Mandatory Customer UI Profile Options"](#)

4.3.1 Set up Guest User Access

Setting up a guest user is required for the Customer UI to display. It also allows customers to browse your stores without registering. 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 anonymous users cannot see each other's changes. A user must register before he can place an order or view order details in Order Tracker.

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

- For information on setting up registered users, see [Chapter 12, "Implementing Users and Registration"](#).

4.3.1.1 Steps to Set up the Guest User

Use the following steps to set up the guest user account.

Prerequisites

None

Login

Oracle Forms

Responsibility

System Administrator

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. This name can be any name that you choose, of reasonable length.
4. In the **Password** field, enter a password for this user name.
5. In the **Responsibilities** block, choose the seeded Oracle iStore customer responsibility, **IBE_CUSTOMER**, from the Responsibility LOV.
6. Save your changes.
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_RESPONSIBILITY

See [Section A.3.3, "Foundation 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 **Setting up the Self Service User** in *Oracle CRM Technology Foundation Concepts and Procedures* (or user guide) for instructions.
9. Verify the guest user account, as described in the next section: [Section 4.3.2, "Verify the Guest User Account"](#).

4.3.2 Verify the Guest User Account

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

Prerequisites

You have set up the guest user account as described in [Section 4.3.1, "Set up Guest User Access"](#).

Login

Open the Oracle iStore Customer UI at the URL:

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

Responsibility

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

Steps

1. Log out of any Oracle applications.
2. Restart the Apache server.
3. Navigate to the URL:

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

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

4.3.3 Set Mandatory Customer UI Profile Options

Profile options control many aspects of the Customer UI. At a minimum, you **must** set the profile options in this section:

- [Section 4.3.3.1, "Mandatory iStore Customer UI Profile Options"](#)
- [Section 4.3.3.2, "Mandatory Oracle Quoting/Order Capture \(ASO\) Profile Options"](#)
- [Section 4.3.3.3, "Mandatory Sequential Numbering Profile Option"](#)

You can also set other Oracle iStore (IBE) profile options for the Customer UI if you do not want to use the default settings.

- See [Appendix A, "Profile Options"](#), for a complete list.

4.3.3.1 Mandatory iStore Customer UI Profile Options

Set the following **mandatory** IBE profile options at the **application** level to iStore in order to configure the Customer UI.

Important: You must set these profile options for orders to be submitted properly.

1. IBE: Pricing Event for Shopping Cart --- Set 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.

2. IBE: Create Order in Entered State, if it has errors while booking --- Set to **Yes.**

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.

3. IBE: Recalculate Price in Order Management --- This profile option defaults to **No, so you should not need to set it. You may wish to ensure that its value is **No**, however, because setting this profile option to **Yes** can seriously impact performance. Unless there is some specific reason for setting it to **Yes**, it is strongly recommended that its value be **No**.**

If set to **No**, the cart (quote) prices are passed on to Oracle Order Management unchanged. If the profile option is set to **Yes**, the cart-related prices can be changed in the order because Oracle Order Management is allowed to recalculate the prices for the quote.

4. **IBE: Pricing Event--Before Shopping Cart** --- Set this profile option to **Enter Order Line**.

This profile option specifies the user-defined pricing event (defined in Pricing) for the catalog stage.

5. **IBE: Default Payment Term** --- Set to the payment term that will be the default payment term for orders. Payment terms are set in Oracle Receivables. See *Oracle Receivables User Guide* for more information.
6. **IBE: Authorize Payment Offline During Normal Checkout** --- Ensure that this is set to **Yes** at the iStore application level. The only supported value for this profile option is Yes. This profile option specifies if payment authorization offline before checkout is allowed. Setting it to Yes will disable online credit card payment authorization. Default = Yes. It is recommended that you use the ASO: Credit Card Authorization profile option instead, to turn credit card authorization on or off. See [Section 4.3.3.2, "Mandatory Oracle Quoting/Order Capture \(ASO\) Profile Options"](#).

A list of profile options can be found in [Appendix A, "Profile Options"](#).

4.3.3.2 Mandatory Oracle Quoting/Order Capture (ASO) Profile Options

Set the following **mandatory** Oracle Order Capture and Oracle Quoting profile options to configure the Customer UI.

Set these at the **application** level to iStore, *unless it is stated otherwise in the description*.

For more information, see:

- *Oracle Order Management Suite Implementation Guide*
- *Oracle Quoting Implementation Guide*
- *Oracle Order Capture API Reference Guide*

1. **ASO: Credit Card Authorization** --- This mandatory profile option allows online credit card authorization when an order is created. Ensure that this is set to Yes to enable online credit card authorization, or if you want to disable credit card authorization online, set this profile option to No. Possible values: Yes/No.

The default value is Null, which is assumed to be No by the applications. See also: *Oracle iPayment Implementation Guide*.

2. **ASO: Default Quote Status** --- Set to **Store Draft** at the iStore application level.

This mandatory profile option determines the default quote status of an iStore shopping cart. The default quote status of Store Draft is hard coded into the iStore application beginning in Release 11.5.8, but you should check the value of this profile and ensure that it is set properly. Once ordered, carts move to the Quoting status of Order Submitted. If a user requests sales assistance, the cart moves to the Quoting status of Draft. Depending upon the sales representative's actions, the cart/quote can move into other statuses as well.

3. **ASO: Default Order State** --- Set this to **Booked**. Possible values: **Booked** or **Entered**.

Oracle Order Capture APIs send order data to Oracle Order Management (OM). Submit_Quote API passes carts to the Create_Order API, which books the order in OM. **Booked** orders are ready to move to the next stage in the order process (for example, shipping), while **Entered** orders must then move to the Booked stage before completion.

Exception to the above: If a user is paying 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.

Also note that Booked orders cannot be deleted or modified (although quantity can be changed) by a sales representative. In addition, a sales representative cannot do a line-level return for a Booked order.

4. **ASO: Default Order Type** --- Set this to **Mixed**.

This profile option determines how an order is to be processed in OM. Order types, which use the ORDER_CATEGORY_CODE internal name, are set up in OM and restrict the types of lines on an order. This profile option also can be set at site and responsibility levels. See the *Oracle Order Management Suite Implementation Guide* for more details.

5. **ASO: Default Salesrep** --- Set this either to **No Sales Credit** or the **sales representative name** who will be the default contact when a customer requests sales assistance.

This profile option also can be set at site, application, responsibility, and user levels. For example, you can set it to No Sales Credit at the site level and to a sales representative name at the application level.

6. ASO: Enable TCA Changes --- Set this to **Yes**.

This profile option is required for address validation in the Trading Community Architecture schema. It is used, for example, when a user attempts to split billing and shipping contacts in the Customer UI.

7. ASO: OM Defaulting --- Set this to **No** or **Yes**, depending upon your configuration of Oracle Order Management and your business needs.

This profile option determines whether OM should default the values (following rules you set up in Oracle Order Management), for the following order attributes, if no values exist for these attributes when the cart is submitted:

- order_type_id,
- payment_term_id,
- fob_code,
- freight_terms_code
- shipment_priority_code

Set to **No** to **not allow** OM to use the default values. Set to **Yes** to enable OM to use the default values when a user submits a cart with null values for the above fields.

4.3.3.3 Mandatory Sequential Numbering Profile Option

Set the following **mandatory** profile option at **site** level:

■ **Sequential Numbering** --- Set this to **Always Used**.

This profile option (which unlike other profile options has no product prefix, such as IBE or ASO), is required in the iStore orders process.

A list of profile options can be found in [Appendix A, "Profile Options"](#).

4.4 Testing Stores

You should verify that the Customer UI works correctly before launching your stores.

- See [Section 18.1.1, "Testing the Stores"](#).

Part III

Advanced Implementation Tasks

This section describes how to implement features of Oracle iStore 11*i*. that are beyond the basic implementation. This part contains the following chapters:

- [Chapter 5, "Implementing Initial Customer UI Pages"](#)
- [Chapter 6, "Implementing Products"](#)
- [Chapter 7, "Implementing Customer UI Catalog"](#)
- [Chapter 8, "Implementing Customer UI Display"](#)
- [Chapter 9, "Implementing Pricing"](#)
- [Chapter 10, "Implementing Payment Types and Shipping Methods"](#)
- [Chapter 11, "Implementing Carts and Orders"](#)
- [Chapter 12, "Implementing Users and Registration"](#)
- [Chapter 13, "Implementing Customer Assistance"](#)
- [Chapter 14, "Implementing Messages and Prompts"](#)
- [Chapter 15, "Implementing Reports"](#)
- [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#)
- [Chapter 17, "Implementing Performance and SSL"](#)

Implementing Initial Customer UI Pages

This chapter provides an introduction to the Oracle iStore 11*i* Customer UI and describes how the initial (start or landing pages) are implemented.

Note: This chapter assumes that you have performed the required implementation tasks in:

- [Chapter 2, "Before You Begin"](#) and
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#).

Main topics in this chapter include:

- [Customer UI Overview](#)
- [Configuring Initial Pages](#)
- [How Oracle iStore Directs Users in Customer UI Initial Pages](#)
- [Specialty Store Page](#)
- [Store Home Page](#)

5.1 Customer UI Overview

In the context of Oracle iStore, the customer-facing pages are referred to as the *Customer UI*. After you create a store and add a responsibility to it, the specialty store should be available in the Customer UI to a user with the responsibility supported by the specialty store.

Store creation is described in [Section 4.2.2, "Creating a Store"](#).

Out-of-the-box, Oracle iStore provides two configuration options for controlling the appearance of the initial landing pages of the Customer UI:

1. Send users to the Specialty Store Page as their initial landing page. This page shows a list of specialty stores accessible to the user. Out-of-the box, this will be the page that displays specialty stores in your implementation.
2. Send users to a specialty store's home page, called the Store Home Page.

Information on configuring the look and feel of the web stores can be found in [Chapter 8, "Implementing Customer UI Display"](#).

5.1.1 Customer UI Terminology

The following key terms and definitions will be used throughout this guide:

- [Browse Bin](#)
- [Customer UI](#)
- [Global Bin](#)
- [Guest \(Walk-in\) User](#)
- [Language List](#)
- [Language Links](#)
- [Minisite/Store](#)
- [Preview Mode](#)
- [Specialty Store](#)
- [Store Home Page](#)
- [Specialty Store Page](#)
- [Specialty Store Picker](#)
- [Templates](#)
- [Welcome Bin](#)

Browse Bin

Displaying by default on the left side of the Store Home Page, the Browse Bin allows users to navigate to sections within the specialty store.

- See [Section 5.4.2, "Browse Bin on Store Pages"](#), for more information.

Customer UI

The customer-facing pages of your Oracle iStore implementation are considered the Customer UI.

Global Bin

The Global bin displays a currency picker, and can display other items.

- See [Section 5.4.3, "Global Bin on Store Home Page"](#), for more information.

Guest (Walk-in) User

This is a user who is not logged in, and is also called a walk-in user. Unless a particular store does not allow walk-in users, this user can browse, configure items, and add items to his cart, but cannot place orders without registering. Once registered, users are recorded in the FND_USER table.

- For more information, see [Section 4.3.1, "Set up Guest User Access"](#).

Language List

Enabled by a profile option, this is the list of supported languages across the top of the Specialty Store Page. Each language is an image link allowing users to switch their current session language.

- See [Section 5.3.2, "Language List"](#), [Figure 5–3, "Language List Example"](#), and [Section 5.3.3, "Language Images"](#), for more information.

Language Links

The Language Links are the hyperlinks that show the available languages for a specialty store. They display beneath each specialty store in the Specialty Store Page. Each hyperlink represents a specific language.

- See [Section 5.3.4, "Language Links"](#), and [Figure 5–4, "Language Links Example"](#), for more information.

Minisite/Store

When you create a store in the Store Administration UI, it is considered a minisite, or store, and is uniquely identified by the numerical Store ID/Minisite ID. Once you add a responsibility to the store, each iteration of store-responsibility is considered a specialty store. Each store supports any number of responsibilities, but each specialty store supports only one responsibility. The responsibilities supported by a store are selected during setup.

- See [Section 4.2.2, "Creating a Store"](#), for more information.

Preview Mode

Oracle iStore's **Preview** mode allows merchants to preview Customer UI specialty stores while working on them in the Store Administration UI. To use preview mode, select the Preview button in the Stores, Products, and Sections pages. In preview mode, all products and sections within a specialty store -- whether published or unpublished -- will be viewable by the merchant. Changes are viewable immediately.

Note: In **Preview** mode, only specialty stores which support the administrator's current session language will display. See [Section 18.1.2, "Using Preview Mode"](#), for more information.

- See [Section 18.1.1, "Testing the Stores"](#), and [Section 18.1.2, "Using Preview Mode"](#), for more information.

Specialty Store

A specialty store is any online store (available in the Customer UI) created through the Oracle iStore Store Administration UI. It is a combination of one store (minisite) and one responsibility. Each store supports any number of iStore customer responsibilities, but each specialty store supports only one responsibility. The responsibilities supported by the store are selected during setup.

- See [Section 4.2.2, "Creating a Store"](#), for more information.

Store Home Page

Using the JSP, `ibeCZzpHome.jsp`, the Store Home Page is the first visible catalog page of a specialty store. It can be configured to be the default landing page.

- See [Section 5.4, "Store Home Page"](#), for more information.

Specialty Store Page

Using the JSP, `ibeCZzdMinisites.jsp`, this is the page that lists available specialty stores and languages. Out-of-the-box, this will be the landing page for the Customer UI.

- See [Section 5.3, "Specialty Store Page"](#), and [Figure 5-2, "Specialty Store Page Example"](#), for more information.

Specialty Store Picker

Controlled by a profile option, this is a drop-down list of accessible specialty stores on the Store Home Page, and is used to switch between different specialty stores.

- See [Section 5.4.1, "Specialty Store Picker"](#), and [Figure 5–6, "Specialty Store Picker/Language List Example"](#), for more information.

Templates

Templates linked to source JSP files present the Customer UI pages. Oracle iStore ships with hundreds of templates to configure your Customer UI.

- See [Appendix E, "Display Templates and Media Objects"](#), for a complete list of templates.

Welcome Bin

This bin displays by default on the right side of the Store Home Page in the Customer UI, and contains a sign in link and other information for the user.

- For more information, see [Section 5.4.4, "Welcome Bin on Store Home Page"](#) and [Figure 5–8, "Welcome Bin Example"](#).

5.2 Configuring Initial Pages

By default (out-of-the-box), the specialty store entry page will be the Specialty Store Page.

If **IBE: Use Specialty Store Page** profile option is set to No, however, the user will be redirected to the Store Home Page. In this case, the default specialty store will be picked up from the profile option, **IBE: Default Specialty Store**. See [Section 5.4, "Store Home Page"](#), for more information.

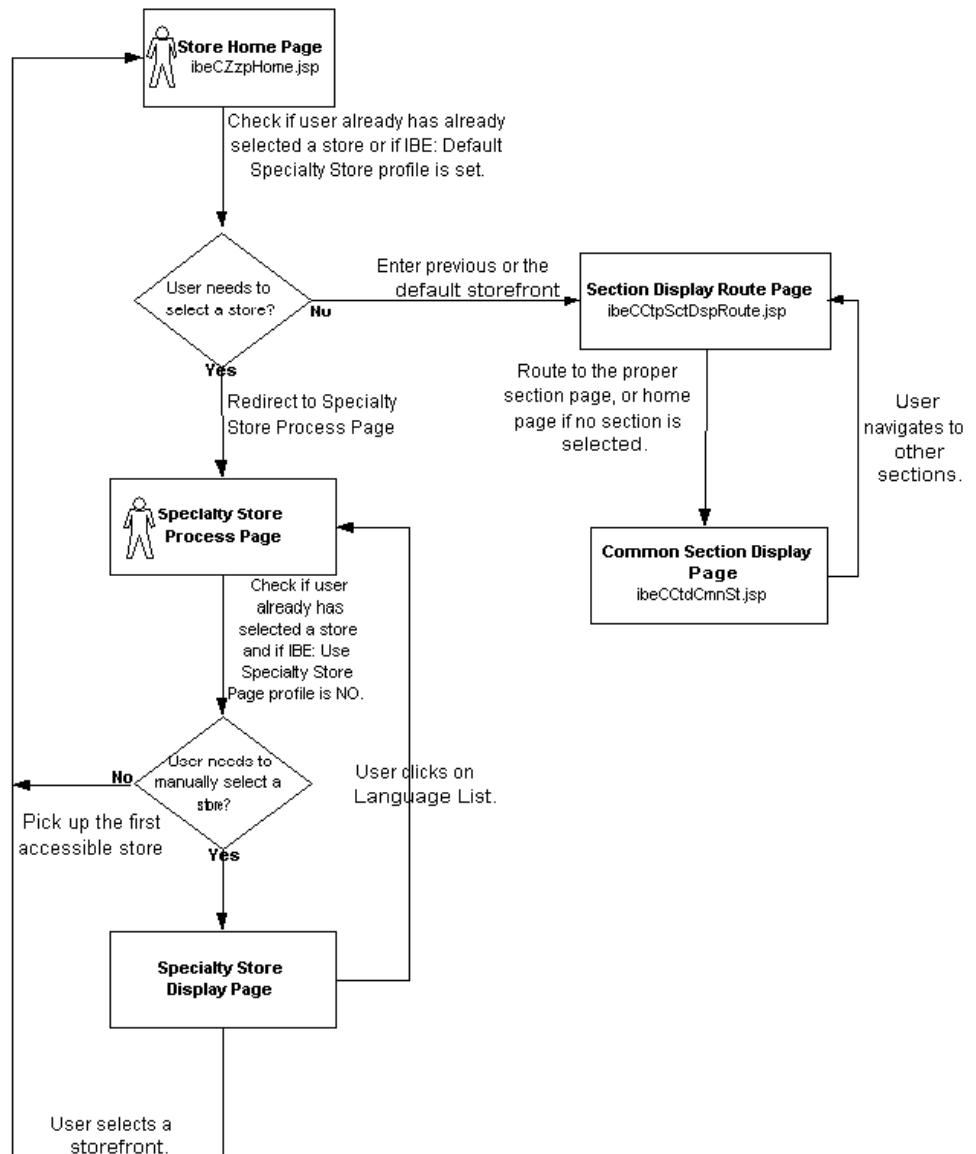
The **Specialty Store Page** displays:

- A list of all specialty stores. Which specialty stores display is determined by the responsibility of the user approaching the page and the configuration of your access restrictions. See [Section 4.2, "Creating Stores"](#) for more information.
- In a multiple-language implementation, the specialty stores that are available will include a language link underneath them. Users select the appropriate language link to enter the specialty store. See [Section 16.3.2, "Install Languages and Currencies"](#), for more information on languages implementation.

If a customer can only access one specialty store, he automatically is forwarded to that specialty store's Home Page and does not see a list of specialty stores.

The following diagram explains how Oracle iStore routes users through the initial pages of the Customer UI.

Note that this is a basic flow and does not cover all possible scenarios.

Figure 5–1 How Oracle iStore Directs Users in Customer UI Initial Pages

For a discussion of the initial start page options, see:

- [Section 5.3, "Specialty Store Page"](#)
- [Section 5.4, "Store Home Page"](#)

See also, [Section 5.1.1, "Customer UI Terminology"](#).

5.3 Specialty Store Page

The Specialty Store Page is the initial landing page by default for the Customer UI.

The Specialty Store Page:

- By default, shows all specialty stores that are accessible to the user in case-insensitive, alphabetical order. Which specialty stores display is based on user responsibility and access restrictions enabled during setup.
- The profile option, **IBE: Use Display Order Feature**, controls whether you can manually set the display order of Specialty Store Page specialty stores. This manual ordering is done in the Store Administration UI, in the **Stores > Responsibility > Display Order** pages.
- When the store administrator is viewing the Customer UI in store **Preview** mode, this page displays **all** specialty stores that are accessible to the administrator's current session language. See [Section 18.1.2, "Using Preview Mode"](#), for more details.
- In a multiple-language implementation, displays language links under available stores. Users select a language link to enter a store. This display can be controlled by setting a profile option. See [Section 5.3.1, "Setting up Specialty Store Page Columns"](#), below, for details.
- In a single-language implementation, displays a single droplist of available stores. This display can be controlled by setting a profile option. See [Section 5.3.1, "Setting up Specialty Store Page Columns"](#), below, for details.
- Enabled by default, assuming the following profile option is set at the application level to iStore:
 - **IBE: Use Specialty Store Page = Yes**
- Provides a static link to the Store Home Page, `ibeCZzpHome.jsp`.
- Can display a Language List. See [Section 5.3.2, "Language List"](#), for more information.
- Stores that do not allow guest users will display an asterisk (*).

5.3.1 Setting up Specialty Store Page Columns

The Specialty Store Page can display your specialty stores in multiple columns, or it can display a single drop-list of available specialty stores. The number of columns that displays depends upon the value of the profile option, **IBE: Maximum Columns in Specialty Store Page**, set at the iStore application level.

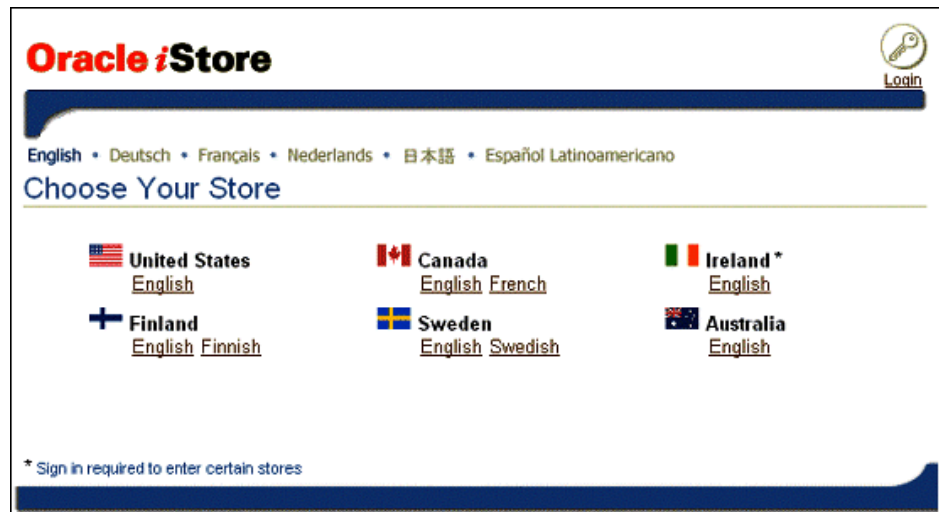
To enable the Specialty Store Page in multiple columns, set the profile option to an integer greater than zero. It is recommended that you set it to a reasonable number of columns for a web page, such as 2 or 3.

As a best practice in the case of a multiple-language implementation, you could set up the page with multiple columns. This allows all of the specialty stores and available languages hyperlinks to display across the page.

As a best practice in the case of a single-language implementation, you can set it up as a single column (drop-list of specialty stores). In this case, set the profile option to 0 (zero).

The figure below is an example of how the Specialty Store Page might look in an implementation of Oracle iStore where multiple-columns are enabled.

Figure 5–2 Specialty Store Page Example



Implementing the elements of this page is discussed in the following sections:

- [Section 5.3.2, "Language List"](#)

- [Section 5.3.3, "Language Images"](#)
- [Section 5.3.4, "Language Links"](#)
- [Section 5.3.5, "Specialty Store Logo Image"](#)
- [Section 5.3.6, "Specialty Store Flag Images"](#)
- [Section 5.3.7, "Stores Button"](#)

5.3.2 Language List

The Language List is a list of all supported languages across all stores. It allows users to switch their current session language, which internally changes the minisite language if applicable.

Supported languages are those that have been fully implemented in your instance and enabled in Store Administration UI during setup. You must have more than one language installed and enabled for the Language List to display.

- See [Section 16.3.2, "Install Languages and Currencies"](#), for information on getting started with multiple languages implementation.

The Language List can display on the Specialty Store Page or the Store Home Page.

Each language that displays in the Language List is an image mapped to a media object (see [Section 5.3.3, "Language Images"](#) below).

5.3.2.1 Displaying Language List on Specialty Store Page

The Language List in the Specialty Store Page is displayed by default, unless:

- The profile **IBE: Display Language List in Specialty Store Page** is set to **No**, or
- Your implementation of Oracle iStore supports only one language.

After you implement the supported languages, to enable the Language List in the Specialty Store Page:

1. Set the following profile option at the application level to iStore:
 - **IBE: Display Language List in Specialty Store Page = Yes**
2. The images for the Language List are shipped with the application, but are not by default mapped to their media objects. For the applicable languages, map the images (or use your own custom images) to their media objects.
 - See [Section 5.3.3, "Language Images"](#), below, for more information.

Note: You must also set the following profile options to enable the Specialty Store Page:

- **IBE: Use Specialty Store Page = Yes**
- **IBE: Maximum Columns in Specialty Store Page**
 - Set to an integer greater than zero to enable multiple columns in the page (recommended if you are implementing multiple languages).
 - Set to 0 (zero) to enable a single drop-list of stores (recommended if you are implementing one language).

Language List Example

The figure below shows how the Language List with its Language Images might appear at the top of the Specialty Store Page or the Store Home Page.

Figure 5–3 Language List Example



5.3.2.2 Displaying the Language List in Store Home Page

The Language List in the Store Home Page will **not** display unless:

1. The Specialty Store Picker is enabled, and
2. The current store supports multiple languages.

Note: The Language List in the Store Home Page is **not** controlled by the profile option, **IBE: Display Language List**. Instead, the Specialty Store Picker and the Language List in the Store Home Page are one component. See [Section 5.4.1, "Specialty Store Picker"](#), for more details.

5.3.3 Language Images

To present the language images in the Customer UI, Oracle iStore ships with more than 20 logical media objects and physical language images. Using the application's standard media objects functionality, at runtime the programmatic access name of a specific language is constructed dynamically.

- See [Section 8.5, "Understanding Media Objects"](#), for information on how Oracle iStore's Customer UI pages use media objects to display image files.

The language images are not mapped to the media objects by default. You must set up your own mappings between the media objects and the images. It is recommended that the mapping for the language images be set to **ALL** stores/**ALL** languages.

- See [Section 8.5.4, "Assigning Content Items to Media Objects"](#), for steps to map the language files to the media objects.
- For a list of the image files, see [Section 5.3.3.1, "Language Images Seeded Values"](#), below.

The convention for determining the programmatic access names of the media objects is:

- **STORE_SEL_LANG_IMAGE_<language code>** --- For a language that is selected in the UI.
- **STORE_DESEL_LANG_IMAGE_<language code>** --- For a language that is deselected in the UI.

For example, for the German language, the media object's programmatic access names are:

- **STORE_SEL_LANG_IMAGE_D** --- Media object to use for the German language in its selected state.
- **STORE_DESEL_LANG_IMAGE_D** --- Media object to use for the German language image in its de-selected state.

5.3.3.1 Language Images Seeded Values

The following table, Oracle iStore Seeded Language Images, lists the seeded languages for the Language List, along with their language codes and physical media files for the "selected" language images. By default, Oracle iStore stores media files in the OA_MEDIA directory.

Note: The physical media files for the "deselected" language images are identical to the "selected" language media files, except for the final **S** on the end of the file name. For example, the physical media file mapped to the Arabic "deselected" language image is **ibeLangAR.gif**, while the "selected" physical file is **ibeLangARS.gif**.

Table 5–1 Oracle iStore Seeded Language Images

Language	Language Code	Mapped Physical Media for "Selected" Language Images
Arabic	AR	/OA_MEDIA/ibeLangARS.gif

Table 5–1 Oracle iStore Seeded Language Images

Language	Language Code	Mapped Physical Media for "Selected" Language Images
Chinese, Simplified	ZHS	/OA_MEDIA/ibeLangZHSS.gif
Chinese, Traditional	ZHT	/OA_MEDIA/ibeLangZHTS.gif
Danish	DK	/OA_MEDIA/ibeLangDKS.gif
Dutch	NL	/OA_MEDIA/ibeLangNLS.gif
English, U.S.	US	/OA_MEDIA/ibeLangUS.gif
Finnish	SF	/OA_MEDIA/ibeLangSFS.gif
French, Canadian	FRC	/OA_MEDIA/ibeLangFRCS.gif
French, European	F	/OA_MEDIA/ibeLangFS.gif
German	D	/OA_MEDIA/ibeLangDS.gif
Greek	EL	/OA_MEDIA/ibeLangELS.gif
Hebrew	IW	/OA_MEDIA/ibeLangIWS.gif
Italian	I	/OA_MEDIA/ibeLangIS.gif
Japanese	JA	/OA_MEDIA/ibeLangJAS.gif
Korean	KO	/OA_MEDIA/ibeLangKOS.gif
Norwegian	N	/OA_MEDIA/ibeLangNS.gif
Portuguese, Brazilian	NL	/OA_MEDIA/ibeLangNLS.gif
Portuguese, European	PT	/OA_MEDIA/ibeLangPTS.gif
Russian	RU	/OA_MEDIA/ibeLangRUS.gif
Spanish, Latin American	ESA	/OA_MEDIA/ibeLangESAS.gif
Spanish, European	E	/OA_MEDIA/ibeLangES.gif
Swedish	S	/OA_MEDIA/ibeLangSS.gif
Thai	TH	/OA_MEDIA/ibeLangTHS.gif

Other seeded media objects for the Language List are:

- **STORE_LANG_IMAGE_DEFAULT** --- If a required language image cannot be found, then a default image appears. The (unmapped out-of-the-box) physical file for this media object is ibeLangALL.gif.

- **STORE_LANG_IMAGE_SEPARATOR** --- This is the media object for the small bullet separator between the languages in the language list. The (unmapped out-of-the-box) physical file for this media object is `ibeLangDot.gif`.

5.3.4 Language Links

Each specialty store listed on the Specialty Store Page will display language hyperlinks (for fully implemented and supported languages only) underneath its display name. If only one language is enabled, a hyperlink will display that supported language underneath the store's display name. A user enters a specialty store with a specific language by selecting the language link.

The figure below shows how the language links might appear on your Specialty Store Page.

Figure 5–4 Language Links Example



5.3.5 Specialty Store Logo Image

The logo that displays at the top left of the Specialty Store Page can also be mapped to a specific image. The logical media name is:

- **STORE_LOGO_MAIN** -- There is no ALL-ALL out-of-the-box mapping for this media object, but Oracle iStore does default to `ibeTabLogo.gif`.

To provide a store logo for a specific specialty store, map this logical media name at the store level to the image you wish to display. See [Section 8.3, "Content Overview"](#), for more information.

5.3.6 Specialty Store Flag Images

The logical media name for displaying flag images is:

- **STORE_LOGO_SPECIALTY** -- There is no default mapping to an image for this logical media. However, the default mapping should be reserved for global store flags or any default store flags.

To provide flag images for the Specialty Store Page, map each logical media name at the store level to the image you wish to display. See [Section 8.3, "Content Overview"](#), for more information.

5.3.7 Stores Button

The global Stores button allows immediate access to the Specialty Store Page where a user can select from available stores. This button appears whenever the profile option, **IBE: Use Specialty Store Page**, is set to **No**. Two logical media are seeded to provide the icon images:

- **STORE_SEL_STORE_IMAGE** --- This is the logical media for displaying the store button when it is active.
- **STORE_DESEL_STORE_IMAGE** --- This is the logical media for displaying the store button when it is inactive.

5.4 Store Home Page

The Store Home Page is the home page of any specialty store that you have created. In other words, it is the landing page or first visible catalog page of a specialty store. It has the physical name, **ibeCZzpHome.jsp**.

To route customers directly to this page when they attempt to enter the Customer UI, set the following profile options at the application level to iStore:

- **IBE: Use Specialty Store Page = No**
- **IBE: Default Specialty Store = <Store/Minisite ID>**

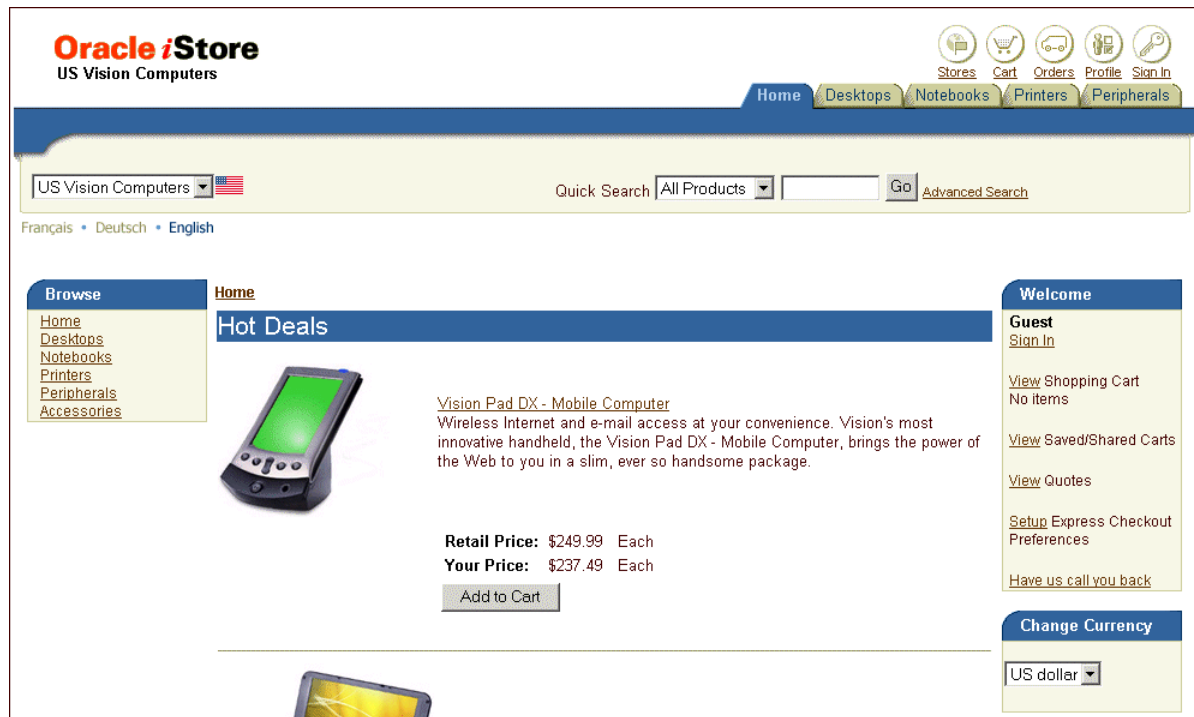
To find Minisite ID/Store ID:

1. Log into the Store Administration UI as store manager/iStore administrator.
2. Select the radio button of the store for which you wish to find the ID number.
3. Select **Update**. In the **Update Store: Details** page, the Store ID field will display the Store ID number.

If the user cannot access the default specialty store or the profile option **IBE: Default Specialty Store** is not defined, Oracle iStore sends the user to the first store in the database that the user can access.

The figure below is an example of the Store Home Page.

Figure 5–5 Store Home Page Example



Implementing the elements of this page is discussed in the following sections:

- [Section 5.4.1, "Specialty Store Picker"](#)
- [Section 5.4.2, "Browse Bin on Store Pages"](#)
- [Section 5.4.3, "Global Bin on Store Home Page"](#)
- [Section 5.4.4, "Welcome Bin on Store Home Page"](#)

5.4.1 Specialty Store Picker

This menu is a drop-list of all available specialty stores, which by default displays below the menu tabs and above the Browse bin on the Store Home Page. If more than one language is implemented, the Specialty Store Picker will also display along with it, the Language List. The Specialty Store Picker is **disabled** by default. To enable the Specialty Store Picker and its companion Language List on the Store Home Page, set following profile option at the application level to iStore:

- **IBE: Use Specialty Store Picker = Yes**

Note: More than one specialty store must be accessible to a user before the list of stores will display.

The figure below shows how the Specialty Store Picker and its companion Language List might look in an implementation of Oracle iStore.

Figure 5–6 Specialty Store Picker/Language List Example



5.4.2 Browse Bin on Store Pages

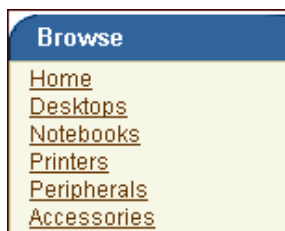
The Browse Bin is a navigational bin which by default displays on the left side of the Store Home Page and other section pages. It contains a list of all accessible top-level sections within the accessible specialty stores in your implementation. The Browse Bin is enabled by setting the following profile to Yes at the iStore application level:

- **IBE: Use Section Bin** --- This profile option specifies whether the Browse Bin is displayed on the Store Home Page and other section pages in its default location, at the left-hand side of the screen. Possible values are Yes and No. The default value is Yes.

In order to display, the Browse Bin template must also have a valid physical JSP mapped to it (which it does by default, out-of-the-box). The name of the Browse Bin Display Template is **STORE_CTLG_SCT_BROWSE**, and it is mapped to the JSP, **ibeCCtdSctBrwsBin.jsp**.

The figure below shows how the Browse Bin might look in an implementation of Oracle iStore.

Figure 5–7 Browse Bin Example



5.4.3 Global Bin on Store Home Page

The Global Bin is a configurable bin that displays on the Store Home Page when:

1. The profile option, **IBE: Use Global Bin**, is set to **Yes**.
2. The template **STORE_GLOBAL_STORE_BIN** has a valid physical JSP mapped to it (which it does by default, out-of-the-box).
3. The user's active responsibility is not Sales Representative (IBE_SALESREP).
4. The bin can display at least one of its components:
 - **Language Picker** --- Only displays if **IBE: Use Specialty Store Picker = No**
 - **Currency Picker** --- If the Specialty Store Picker is enabled (**IBE: Use Specialty Store Picker = Yes**), and *current* store has multiple currencies enabled, then *only* the Currency Picker displays in the bin and, in this case, the bin title is *Change Currency*. Note that this element of the bin always displays, if conditions 1 and 2, above, are true.
 - **Change Store Link** --- Allows users to switch between stores. Only displays if **IBE: Show Change Store Link** is set to **Yes**, and more than one store is available to the user.

Note: If you map the Global Bin into the shopping cart page, then changing currency in the shopping cart page will affect the existing cart. When the user selects a different currency from the bin, the cart items are repriced in the newly selected currency.

5.4.4 Welcome Bin on Store Home Page

The Welcome Bin displays by default on the right side of the Store Home Page.

The Welcome Bin contains links to the following:

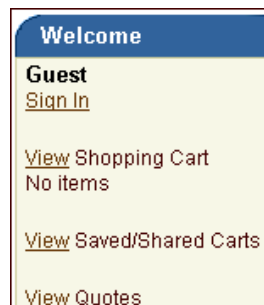
- **View Quotes** -- This link displays if your implementation is integrated with Oracle Quoting. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.
- **Express Checkout** -- This link displays if you have enabled Express Checkout. See [Section 11.3.8, "Express Checkout"](#), for more information.
- **Sign-in/Sign-out** -- The Sign-in link displays in the bin if the user is not logged in. The Sign-out link displays if the user is logged in.
- **View Saved/Shared Carts** --- This link provides access to saved or shared carts.
- **View Shopping Cart** -- This link provides access to the user's Active cart.

The Welcome Bin is enabled by default. If you wish to disable the bin, set the following profile option at the application level to iStore:

- **IBE: Use Welcome Bin** --- Set this profile option to **No** to disable the appearance of the Welcome Bin.

The figure below is an example of how the Welcome bin might display in an implementation of Oracle iStore.

Figure 5–8 Welcome Bin Example



Implementing Products

This chapter describes how to implement products in Oracle iStore 11i.

Note: This chapter assumes that you have already implemented Oracle Inventory, according to the most recent *Oracle Inventory User's Guide*.

Information on working with the product catalog can be found in [Chapter 7, "Implementing Customer UI Catalog"](#).

Main topics in this chapter include:

- [Products in Oracle iStore Overview](#)
- [Other Oracle iStore Integrations for Product Deployment](#)
- [Guidelines and Considerations for Oracle iStore Product Setup](#)
- [Providing Regular Available to Promise \(ATP\)](#)
- [Using Product Autoplacement](#)
- [Translating Product Descriptions](#)
- [Using Descriptive Flexfields for Products](#)
- [Setting up Product Search for the Customer UI](#)

6.1 Products in Oracle iStore Overview

In a typical implementation, Oracle Inventory is the repository of all products sold through the Oracle iStore Customer UI. Products are limited to a single organization and a single default Inventory category set defined in two profile options.

In the Store Administration UI, store administrators can view, perform limited maintenance on, assign products to store sections, and assign content to products. In the Customer UI, specialty store customers view the product data and any

related media, as well as search within the default category set and product organization.

Note: In this guide, the terms *item* and *product* are interchangeable.

Certain Oracle Inventory flags need to be set in order for Oracle iStore to best utilize the product data from the Oracle Inventory tables. This chapter's [Guidelines and Considerations for Oracle iStore Product Setup](#) section contains best practices for setting up Oracle iStore to use products from Oracle Inventory.

By default, Oracle iStore ships with the capability to maintain a flexible product catalog, utilizing Oracle Inventory. As a part of maintaining the product database, this includes the ability in the Store Administration UI to:

- View item details, such as name, number, and description
- Change item description information
- Set the Web Status Inventory flag, which is identical functionally to the Published/Unpublished iStore flag
- Assign price lists that contain the products to stores in the Stores > Pricing menu
- Search for products

Optional integration with other Oracle applications can provide additional product functionality. See [Section 6.2, "Other Oracle iStore Integrations for Product Deployment"](#), below, for more information.

Refer to the *Oracle Inventory User's Guide* to plan and set up your overall product structure and individual products in Oracle Inventory. The *Oracle Inventory User's Guide* is available on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

6.2 Other Oracle iStore Integrations for Product Deployment

You can also integrate Oracle iStore with:

- **Oracle Marketing** to provide wider product management capabilities, including:
 - Product creation and maintenance using configurable product templates
 - Assigning products to organizations

- Assigning products to Inventory categories

After you integrate Oracle iStore with Oracle Marketing, this additional functionality is available in the Store Administration UI. Oracle iStore-Oracle Marketing integration is described in [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#).

- **Oracle Bills of Material** to set up configurable items, model bundles, and items with standard warranties for sale in your stores. See [Chapter 21, "Integrating Oracle iStore with Oracle Bills of Material"](#), for details.
- **Oracle Configurator** to enable --- in the Oracle iStore Customer UI --- customer-configured products, guided selling, solution-based modeling, and limited shopping cart validations. See [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#), for details.
- **ATP Information** --- Oracle iStore ships with the ability to check the Oracle Inventory ATP columns; the flag is enabled during store creation. You also can integrate with Oracle Advanced Supply Chain Planning for global ATP. See [Section 6.4, "Providing Regular Available to Promise \(ATP\)"](#), and [Section 20.2.1, "Setting up Global Available to Promise \(ATP\)"](#).

6.3 Guidelines and Considerations for Oracle iStore Product Setup

This section contains guidelines which may be helpful when setting up products in Oracle Inventory to use in Oracle iStore's online stores. However, you must refer to the *Oracle Inventory User's Guide* for specifics of setting up Inventory.

Topics in this section include:

- [Section 6.3.1, "Products Retrieved From a Single Inventory Organization"](#)
- [Section 6.3.2, "Inventory Categories and the iStore Product Catalog"](#)
- [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#)
- [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#)

6.3.1 Products Retrieved From a Single Inventory Organization

Oracle iStore requires one Inventory Organization to be identified, against which the product database is retrieved. This identification is made through the use of the profile option, **IBE: Item Validation Organization**.

6.3.1.1 Setting the Item Validation Organization Profile Option

Set the **IBE: Item Validation Organization** profile option to the Inventory Organization from which you wish to retrieve products.

In a single-organization implementation, this will be the Master Inventory Organization. If you are implementing a multiple-organization (*multi-org*) environment, you should set up your Inventory structure and products in the Master Inventory Organization, but create sub-organizations of the master organization. These sub-organizations then can access all of the Master Inventory Organization data, but remain separate entities linked to an Operating Unit through the MO: Operating Unit profile option.

The MO: Operating Unit profile option can be set at application, responsibility, or user level. The product search in Oracle iStore's Store Administration UI will retrieve products based on the setting of this profile option at the lowest level to which it is set, with user level being the lowest. Note that if you are integrating Oracle iStore with Oracle Marketing's product screens, then special instructions are available in [Section 25.4, "Implementing Oracle Marketing Products Integration"](#).

- See [Section A.2, "How to Set Profile Options"](#), for information on the level hierarchy of Oracle Applications profile options.
- For more information on multi-org setups, see [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#).

In addition, within the default Inventory Organization in your implementation, the Oracle iStore product repository is further restricted to a single Oracle Inventory category set, as discussed in [Section 6.3.2, "Inventory Categories and the iStore Product Catalog"](#).

6.3.2 Inventory Categories and the iStore Product Catalog

In Oracle Inventory, **category sets** are used to group products that are alike. Each category set can contain multiple categories.

Each category set is assigned to a flexfield structure, and the flexfield structure defines segments for the category set. Potentially, categories can have a many-to-many relationship with category sets. When you define a product in Inventory, you define key flexfields that are combinations of the segments defined by the category set flexfield structure.

Refer to the *Oracle Inventory User's Guide* for more details.

Oracle iStore uses the profile option, **IBE: Category Set**, to identify the default category set for its products. This category set typically will have multiple

categories. The default category set contains all of the products that potentially make up your online product catalog in the Customer UI. This category set also comprises the product repository in the Store Administration UI.

When displaying products in the Customer UI, Oracle iStore will treat products in the same category identically --- unless other product-level Display Styles, media objects, or Display Templates are associated with a product.

To define default, category-level display rules for your online stores, you can link each category (within the default category set) to an Oracle iStore Display Style -- either a seeded, default Display Style, or a new Display Style that you map to the category in the **Advanced > Display Styles** pages. See [Section D.5.3, "Using Display Styles for Default Display"](#), for details.

6.3.2.1 Setting the Category Set Profile Option

Set the **IBE: Category Set** profile option to the Oracle Inventory category set you wish to use as the default category set for your store products. Set this at the iStore application level.

As a best practice, set the IBE: Category Set profile value to one of the default category sets that you have already defined for Oracle Inventory, Oracle Purchasing, or Oracle Order Management.

Instructions on setting profile options can be found in Appendix A: [Section A.2, "How to Set Profile Options"](#).

6.3.3 How Oracle iStore Product Fields Map to Oracle Inventory Fields

In Oracle iStore, product fields do not map identically to the Oracle Inventory fields from which they are derived.

The following table, Oracle iStore-Oracle Inventory Field Mapping, shows the field mappings.

Note: If product number is defined as a combination of concatenated segments in Oracle Inventory, when searching on product number in Oracle iStore's product search, then the merchant can input the combination using the correct separator. See the *Oracle Inventory User's Guide* for more details.

Table 6–1 Oracle iStore-Oracle Inventory Field Mapping

iStore Product Field	Inventory Field
Product Name	Relates to Description field in Oracle Inventory forms and to the Description field in the Oracle Inventory MTL_SYSTEM_ITEMS_TL table.
Product Number	Relates to Item field in Oracle Inventory forms. Each product number shown is a combination of key flexfield segments in the Oracle Inventory MTL_SYSTEM_ITEMS_B table.
Description	Relates to the Long Description field in Oracle Inventory forms and to the Long_Description field in the Oracle Inventory MTL_SYSTEM_ITEMS_TL table.

6.3.4 Required Inventory Flags for Oracle iStore Products

There are Oracle iStore-specific flags that must be set for products that will be sold through the web stores. The following flags must be set in the **Oracle Inventory Master Item form** for each product -- including each component in a configured item -- that you plan to sell in an online store:

- **Web Status flag** --- Available in the Master Item form’s Web Option tab, this flag specifies whether a product is **Published** or **Unpublished**. You can set this flag in the Store Administration UI Product pages as well. Only Published products are available to customers in the Customer UI. The store administrator, using Preview functionality from the Store Administration UI, can see all products assigned to sections, regardless of status. Published and Unpublished products are available for assignment to sections in the Store Administration UI.

Note: Oracle Inventory allows users to set a Web Status of Disabled. Products in status Disabled cannot be queried in the Store Administration UI nor assigned to sections. Setting a product’s Web Status to Disabled in Inventory will make products disappear in both the Store Administration and Customer UIs.

- **Orderable on the Web** --- Available in the Master Item form’s Web Option tab, this flag enables the **Add to Cart** button. You cannot set this flag in the Store Administration UI. If this flag is not enabled, a product will display in the Customer UI, but a customer will be unable to add it to a shopping cart.

If a component of an Oracle Bills of Material (BOM) model does not have this flag set (when a user attempts to order it), an Oracle Order Management error will display.

- **Customer Orders Enabled** --- Available in the Master Item form's Order Management tab, this flag marks a product as **orderable by customers**. You cannot set this flag in the Store Administration UI. If this flag is not enabled, no one will be able to order the product.
- **OE Transactable** --- The OE Transactable flag needs to be marked **Yes** in Order Management attributes group, if Order Management and Shipping Execution are implemented. This attribute indicates whether demand can be placed for an item by Oracle Order Management, and whether shipment transactions are communicated to Oracle Inventory. It is mandatory if you want to track the shipment transactions in Inventory. For items you do not ship, you may still want OE Transactable turned on if you use the items in forecasting or planning. A warning is issued if you change the value of this attribute when open sales order lines exist. You cannot turn this attribute off if demand exists.

6.4 Providing Regular Available to Promise (ATP)

Oracle iStore can provide regular available to promise (ATP) information on Inventory items without customization. Oracle iStore checks the ON_HAND_QTY field in the Oracle Inventory ATP columns to determine the availability of products requested in the specialty stores.

In the Customer UI, this manifests as the **Check Availability** link in the Your Shopping Cart page.

For information on enabling global ATP for Oracle iStore, see [Chapter 20, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#).

6.4.1 High-Level Steps to Set up Regular ATP

Following are the high-level steps to set up regular Available to Promise (ATP):

1. Set up ATP in Oracle Manufacturing.
2. Define ATP sourcing rules in Oracle Inventory.
3. Enable products for ATP by setting their ATP and ATP component flags.
4. In the Store Administration UI **Create/Update Store** page, activate the **Allow customers to check item availability** checkbox. See [Section 4.2.2.1, "Create a Store: Getting Started and Entering Basic Information"](#).

See *Oracle Inventory User's Guide* for instructions on setting up ATP rules in Oracle Inventory for regular ATP.

6.5 Translating Product Descriptions

Each product in Oracle Inventory has a name and description. In order for your products to display in a non-base language, you must create translated product descriptions. You can do this using the Store Administration UI. When you create short and long product descriptions, Oracle iStore associates them with the language in which the Store Administration UI is currently rendered.

For example, you can enter German product descriptions when the Store Administration UI is displaying in German, and French product descriptions when the Store Administration UI is displaying in French. When customers enter your stores, they see the product descriptions in the language that they selected.

You can use the following procedure.

Prerequisites

- Multiple Organization Architecture has been implemented.
- Additional languages have been implemented.

See [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#), for information on fulfilling these prerequisites.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and select the **Profile** button. The Oracle CRM Technology Foundation user profile page opens.
2. Change your language display preference to the language into which you want to translate product descriptions. See *Oracle CRM Technology Foundation User Guide* if you need additional instructions.
3. Click **Sign Out** to log out of the application.
4. Launch the Store Administration UI again. The Store Administration UI displays in the newly selected language.

5. In the **Catalog > Products** tab, enter product descriptions. See [Section 7.5.3, "Updating Product Details"](#), for steps. The translations you enter here are associated with the language of the Store Administration UI display.
6. Log out.
7. The translated product descriptions should now display in stores that carry the products and support the specified language.

For more information, see [Section 16.3, "Implementing Globalization with Oracle iStore"](#).

6.6 Using Product Autoplacement

Oracle iStore's product autoplacement feature allows products within Oracle Inventory categories to be automatically added and replaced within leaf sections, according to parameters that you set. The autoplacement is achieved through category-section mappings and the use of the concurrent program, **iStore Product Autoplacement Concurrent Program**.

Topics in this section include:

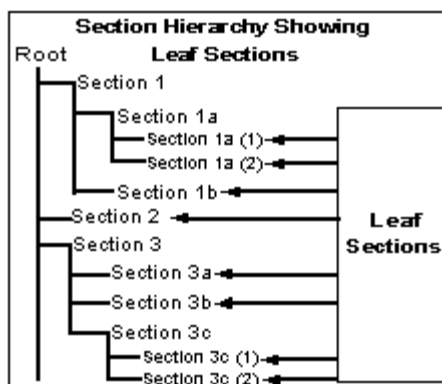
- [Section 6.6.1, "Autoplacement Available for Leaf Sections Only"](#)
- [Section 6.6.2, "Categories Map to Leaf Sections to Place or Replace Products Automatically"](#)
- [Section 6.6.3, "Running the Product Autoplacement Concurrent Program"](#)
- [Section 6.6.4, "Product Autoplacement Examples"](#)
- [Section 6.6.5, "Product Autoplacement Concurrent Program Log"](#)

6.6.1 Autoplacement Available for Leaf Sections Only

The autoplacement feature is available only for leaf sections. A leaf section is the last section(s) in a store section hierarchy node. A leaf section may be a Featured or a Navigational section --- what characterizes it as a leaf section is its location in the hierarchy and the fact that it cannot have subsections.

Note: If you attempt to use autoplacement with sections that are not leaf sections, the autoplacement will not be effective.

The following diagram illustrates the leaf section concept.

Figure 6–1 Section Hierarchy Showing Leaf Sections

6.6.2 Categories Map to Leaf Sections to Place or Replace Products Automatically

The autoplacement process matches Oracle iStore leaf sections to Inventory categories within the default category set specified in the profile option, **IBE: Category Set**.

You must map the leaf sections to categories, as described below.

Note that category assignment is not mandatory. You can always manually select products for any section. When you run the concurrent program, you insert parameters that tell the program which sections and products are candidates for the autoplacement program. The category-section associations that you define determine which categories' products get populated into (or removed from) the sections. [Section 6.6.3, "Running the Product Autoplacement Concurrent Program"](#), for details.

Categories and sections have a many-to-many relationship -- e.g., you can assign a single category to any number of sections; likewise, a single section can have any number of assigned categories.

A warning message will display if you attempt to assign a non-leaf section to a category.

6.6.2.1 Steps to Map Leaf Sections to Categories

1. In the Store Administration UI, navigate to the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page displays.

2. In the **Catalog Hierarchy** page, select the radio button of the **leaf section** which you wish to map to a category. Select **Update**. The **Update Section: Details** page displays, showing details of the section you have selected.
3. From the **Update Section: Details** page, select the **Categories** hyperlink. The **Update Section: Categories** page displays, with the selected section information at the top of the page.

If you have chosen a non-leaf section, the following message will display at the bottom of the screen:

Category assignment won't be used for product autoplacement since the current section is not a leaf section.

4. In the **Update Section: Categories** page, select the **Assign Categories** button. The **Search and Select: Categories** page displays with a list of Inventory categories. These will be the categories within the default category set defined in the profile option, IBE: Category Set.
5. In the **Search and Select: Categories** page, use the **Select** checkboxes to select the categories you wish to assign to the section. You may select multiple categories.

Press the **Select** button to save your selections. The **Update Section: Categories** page reappears, with the categories you have chosen listed in the Categories table.

If you have attempted to assign the categories to a non-leaf section, you will receive a warning message.

Optionally, in the **Search and Select: Categories** page, you may use the search utility to search for categories by **Description** or **Category Code**.

Optionally, in the Categories table of the **Update Section: Categories** page, press the **Remove** icon in a table row to delete a category-section mapping. No warning message will be displayed before removal.

6.6.3 Running the Product Autoplacement Concurrent Program

After you have created the desired mappings between your leaf sections and Inventory categories, you must run the **iStore Product Autoplacement Concurrent Program** to populate the sections with products. You also can instruct the concurrent program to run in Replace mode, and it will update existing products as well as remove products which no longer match the category-section mappings.

For generic instructions on how to run concurrent programs, see [Section B.11, "Running Concurrent Programs"](#).

6.6.3.1 Autoplacement Program Parameters

The following are the parameter settings available in the **iStore Product Autoplacement Concurrent Program**:

- **Run Immediately or Schedule** --- The concurrent program can be run immediately after you enter the parameters or scheduled to run at a later time.
- **Append (add) or Replace actions** --- You can specify if the autoplacement program only **adds** products to sections, or also **removes** products that no longer meet the criteria for inclusion in the sections.
 - **Append action** --- When you use this option, products are always added to sections, but the program never removes products from sections that no longer match the current category-section mapping assignments.
 - **Replace action** --- When you use this option, products are always added to sections, and replaced with "fresh" products if necessary. The products which no longer meet the criteria for inclusion in the leaf section are removed.
- **Target section** --- Use this field to specify the start section for the concurrent program. The target section can be a leaf section or non-leaf section. This parameter is combined with the next parameter on the screen, **Include the subsections of the target section**; possible values: Yes/No. The tandem activity of these two fields is as follows:
 - If the target section is a leaf section and the *Include the subsections of the target section* field is set to Yes, the concurrent program will only perform autoplacement for the target section. This is because if the target section is a leaf section, it will have no subsections.
 - If the target section is a leaf section and the *Include the subsections of the target section* field is set to No, the concurrent program will only do autoplacement for the target section.
 - If the target section is a non-leaf section and the *Include the subsections of the target section* field is set to Yes, the concurrent program will find the leaf subsections under the target section and perform the autoplacement on all of these leaf sections.

- If the target section is a non-leaf section and the *Include the subsections of the target section* field is set to No, the concurrent program will not do the autoplacement. This is because you cannot autopopulate a non-leaf section.
- **Evaluation or Execution modes** --- The program can be executed in one of two modes:
 - **Evaluation** -- When you run the program in this mode, **only the concurrent program output** is populated with the information about assignment, reassignment, replacement, or removal. Since the autoplacement does not actually take place, this allows you the opportunity to view the results of the program before committing the products to the autoplacement program.

To view the concurrent program output: Use the **View Request** screen in Oracle Forms. After the request is submitted, in Oracle Forms select **View > Requests** to retrieve the **View Request** screen. Input the **request ID** to see a specific request. On the **View Request** screen, select the **View Output** button to view the output of the concurrent request.
 - **Execution** -- In this mode, the products are **actually assigned, replaced, or removed** in the leaf sections that you specify, according to the current category-section mappings.
- **Product Name and Product Number fields** --- Use these field to narrow the scope of the concurrent program. You can enter partial values, using the % sign as a wildcard if desired. For example, if you enter t% in the Product Name field, the program will only use products which begin with the letter T. The default value for these two parameters is all products (%).
- **Product Publish Status** --- You can select either published, unpublished, or all products:
 - To make only published products candidates for the program, select Published.
 - To make only unpublished products candidates for the program, select Unpublished.
 - To include products of all statuses, select All.
- **Product Creation Dates** --- You can select products whose **creation dates** match the parameters you enter:
 - In the Product start creation date field, enter the start date in the format: DD-MON-YYYY.

- In the Product end creation date field, enter the end date.

The following figure shows the concurrent program parameters entry form:

Figure 6–2 iStore Product Autoplacement Concurrent Program Screen

6.6.4 Product Autoplacement Examples

This section contains product autoplacement examples.

Example 1

1. **Section 1** is a leaf section. In the Store Administration UI Product pages, you have assigned the following products to Section 1:

Product 1

Product 2

2. **Category 1** in Inventory has been assigned the following products:

Product 1

Product 3

Product 4

3. **Category 2** in Inventory has been assigned the following products:

Product 2

4. In the Store Administration UI **Update Section: Categories** page, you assign:
Category 1 ----> Section 1
5. In Oracle Forms, you start the iStore Product Autoplacement Concurrent Program, using the following parameters:
 - a. **Autoplacement Mode** = EXECUTION
 - b. **Product Assignment Mode** = APPEND
 - c. **Target Section** = Section_1
 - d. **Include subsections of the target section** = No
 - e. **Product Name** = Product % (% is a wildcard)
 - f. **Product Number** = %
 - g. **Product Publish Flag** = ALL
 - h. **Product Start Creation Date** = undefined
 - i. **Product End Creation Date** = undefined
6. You execute the concurrent program. When the program is finished, **Section 1** will contain the following products:
Product 1
Product 2
Product 3
Product 4

This assignment takes place because Category 1 is linked to Section 1 and the products it contains (Product 1, Product 3, Product 4) match the search criteria of the concurrent program.

Example 2

1. Using the product placement definitions in Example 1, you execute the concurrent program in the following mode:
 - a. **Autoplacement Mode** = EXECUTION
 - b. **Product Assignment Mode** = REPLACE
 - c. **Target Section** = Section_1
 - d. **Include subsections of the target section** = No

- e. **Product Name** = Product % (% is a wildcard)
 - f. **Product Number** = %
 - g. **Product Publish Flag** = ALL
 - h. **Product Start Creation Date** = undefined
 - i. **Product End Creation Date** = undefined
2. You execute the concurrent program. When the program is finished, **Section 1** will contain the following products:
- Product 1
- Product 3
- Product 4
- Product 2 is removed from Section 1, as Product 2 is not in Category 1 that is linked to Section 1. Product 3 and Product 4 are added to Section 1.

6.6.5 Product Autoplacement Concurrent Program Log

The following figure is an example of the output log of the concurrent program when you run the autoplacement program in **Evaluation** mode:

Figure 6–3 Product Autoplacement Concurrent Program Output Log Example

Concurrent Program Output Log Example				
Date: [Autoplacement Execution Date]				
Mode: [Evaluation] or [Execution]				
Preferences: [Add and remove product associations] or [Add product associations only]				
Starting Section: [Starting section name]				
Select subsections: [Yes] or [No]				
Product selection: From [date] to [date]				
Product name: [Toy%]				
Web publish status: [Published] or [Unpublished]				
Product Number	Product Name	Action	Section Name	Section Code
AS-1234	Toy Story	Added	Section 1	SEC-001
AS-1235	Toys-Action	Removed	Section 2	SEC-002
AS-1237	Toy Moment	Added	Section 3	SEC-003
AS-1239	Toys Book	Removed	Section 4	SEC-004

6.7 Using Descriptive Flexfields for Products

Oracle iStore allows you to add descriptive flexfields (DFFs) to product detail Display Templates. With this option, the Display Templates display the prompt and the value of descriptive flexfield **global segments**, if a value is defined for the item.

Note: Descriptive flexfield support in iStore is only meant for storing extra information in the form of comments in non-validated fields. In addition, only global segments of the descriptive flexfield are supported.

6.7.1 Steps to Set up Descriptive Flexfields

To set up descriptive flexfields on an item detail page, follow this procedure.

Prerequisites

None

Responsibility

System Administrator

Login

Oracle Forms

Steps

1. Log in to Oracle Forms with the System Administrator 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

Title: Items

4. Set up flexfield segments for Global Data Elements: Select **Segments** and then map each segment you wish to use to a column, specified by the names ATTRIBUTE1 through ATTRIBUTE15.

Example: Map "Sales Rep Email" to "ATTRIBUTE1."

See *Oracle Applications Flexfields Guide* for additional details.

5. Switch to the Inventory responsibility.
6. To set up flexfield segments and values for products 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 brackets 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. Add the product(s) to a section, using one of the item detail templates as a Display Template. Out-of-the-box, all of the seeded product Display Templates can show DFFs. See [Section 7.3.2, "Product Display Templates"](#), for a list of the product Display Templates.
 - b. Reboot the Apache server to clear the cache after entering the new data.

- c. In the Customer UI, navigate to the product(s) detail page.
- d. The flexfield segment prompts and values should appear on the item detail page.

6.8 Setting up Product Search for the Customer UI

Oracle iStore's product search feature allows customers to search the Customer UI product inventory. The product search is restricted to the store that the customer is logged in to. The product search feature in Oracle iStore is implemented using:

- Oracle Inventory tables
- The interMedia text search utility of the Oracle8i database
- The concurrent program, iStore Search Insert

Topics in this section include:

- [Section 6.8.1, "Customer UI Product Search Process Flow"](#)
- [Section 6.8.2, "Product Search Dependencies"](#)
- [Section 6.8.3, "Special Characters and Reserved Words in the Search"](#)
- [Section 6.8.4, "Setting Up Oracle Inventory for Product Search"](#)
- [Section 6.8.5, "Setting Customer UI Search Profile Options"](#)
- [Section 6.8.6, "Running the iStore Search Insert Concurrent Program"](#)
- [Section 6.8.7, "Populating the Section-Level Search Table"](#)
- [Section 6.8.8, "Enabling Fuzzy Searches"](#)
- [Section 6.8.9, "Enabling Synonym Searches"](#)
- [Section 6.8.10, "Creating Search Index Tables"](#)
- [Section 6.8.11, "PL/SQL, Java, and JSPs Involved in Search"](#)
- [Section 6.8.12, "Customizing Search"](#)
- [Section 6.8.13, "Adding Stopwords to Searches"](#)

6.8.1 Customer UI Product Search Process Flow

Following is the process flow for product search in the Customer UI.

1. The product information (part number, description, and long description) is first loaded in an Oracle iStore table (IBE_CT_IMEDIA_SEARCH) via the concurrent program, **iStore Search Insert**.

This step is generally performed after the merchant has loaded products into Oracle Inventory.

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 the search is performed is stored in a Clob called INDEXED_SEARCH. 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.

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.

2. Once the data is loaded, any change to product information is updated in the Oracle iStore table IBE_CT_IMEDIA_SEARCH through a database trigger call on the Inventory table.

This keeps product information current in the search table.

3. Once the data is moved into the search table, the interMedia index is created to facilitate keyword searches.

Note: Searching by languages is enabled by launching the iStore Search Insert program in the enabled language.

6.8.2 Product Search Dependencies

Following are the dependencies to product search for the Customer UI:

- **Oracle Inventory** --- You must ensure that Oracle Inventory is installed and configured properly before setting up the Customer UI product search. Refer to Oracle Inventory implementation documentation for details on how to set up Oracle Inventory for product searching. Product search also requires the 11i version of the Oracle Inventory schema.
- **Oracle interMedia Text** --- You must ensure that Oracle interMedia Text is installed and configured properly before setting up the Customer UI product search. Refer to the Oracle interMedia Text documentation for details on how to set up and configure interMedia Text.

- **Oracle Database** --- The product search requires version 8.1.7 of the Oracle database with the Oracle interMedia Text option installed. You can enable either category-level or section-level searches from the Customer UI Store Home Page pull-down menu.

6.8.3 Special Characters and Reserved Words in the Search

When your customers search in the Customer UI, there are some Oracle interMedia Text restrictions when using reserved words and special characters in a "contains" search string. Following is a brief list --- for a complete list of special characters and reserved words, see the Oracle interMedia Text documentation.

6.8.3.1 Special Characters

- _ (underscore)
- - (hyphen)
- & (ampersand)
- ? (question mark)
- \$ (dollar sign)
- * (asterisk)
- ; (semi-colon)
- | (pipe symbol)
- () (parentheses marks)
- ~

6.8.3.2 Reserved Words

- NT
- AND
- ABOUT
- ACCUM
- MINUS
- NEAR
- OR

Oracle iStore can handle special characters and reserved words if you enclose each search string with brackets { } or use forward slash marks / --- this is known as escaping the characters.

Following are some examples:

1. If you have special characters:

Example:

CBX-AM100-234 --- For this value, you could search by entering this:

CBX/-AM100

2. If you have special characters with wildcards:

Example:

CBX_AM100-234 --- For this value, you could search by entering this:

CBX/-A%

3. If you have reserved words:

Example:

NT --- For this value, you could search by entering this:

{NT}

AND --- For this value, you could search by entering this:

{AND}

4. For a normal search string:

To search not using any special characters or reserved words, just enter the search string normally.

Example:

laptop --- For this value, just put in the search string as in:

laptop

Note: Even though the wildcard % is a reserved character in Oracle interMedia Text, for the Customer UI product search, if using this wildcard, there is no need to put brackets around the search string.

6.8.4 Setting Up Oracle Inventory for Product Search

First, set up your inventory under a common Master Organization. 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 appear multiple times in the Categories LOV.
- Make sure the products have Web Status set to **Published** in the Master Item form. See [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#). You can also query this field by examining the web_status column of the item in the MTL_SYSTEM_ITEMS table.

6.8.5 Setting Customer UI Search Profile Options

Oracle iStore search needs six iStore profile options to be set.

For profile option descriptions and recommended values, see: [Section A.13, "Customer UI Product Search Profile Options"](#).

6.8.6 Running the iStore Search Insert Concurrent Program

To populate the search table used in the category-level product search, you must run the **iStore Search Insert** program one time. Thereafter, the table is updated through a database trigger call on the Inventory table.

Prerequisites

- The profile option, **IBE: Use Category Search**, is set to **Yes** at the iStore application level.
- The profile option, **IBE: Use Synonym Search**, must be set to **No** at the iStore application level, if the thesaurus file is not uploaded.

Responsibility

iStore Concurrent Programs Responsibility

Login

Oracle Forms

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs Responsibility.
2. Select **Single Request** and select **OK**. The Submit Request window opens.
3. From the Name LOV, select **iStore Search Insert**.
4. Select **Submit** to start the concurrent request. Note the request ID.

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 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 Customer UI Store Home Page lists categories with publishable items, within the default category set. If additional product attributes are to be added in the search, this SQL script needs to be modified to add the extra search column.

6.8.7 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.

To switch from category-level to section-level search, run only the iStore Section Search Refresh program.

Prerequisites

- Set the profile option **IBE: Use Category Search** to **No**.
- The profile option, **IBE: Use Synonym Search**, must be set to **No** at the iStore application level, if the thesaurus file is not uploaded.

Responsibility

iStore Concurrent Programs Responsibility

Navigation

Oracle Forms

Steps

1. Follow the procedure outlined in [Section 6.8.6, "Running the iStore Search Insert Concurrent Program"](#), 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 Home Page lists the top level sections, not the product categories.

6.8.7.1 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.

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.

If you are setting up category-level search, follow the steps in [Section 6.8.6, "Running the iStore Search Insert Concurrent Program"](#).

If you are setting up section-level search, follow the steps in [Section 6.8.7, "Populating the Section-Level Search Table"](#).

6.8.8 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 containing 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.

6.8.9 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.

Prerequisites

Set the profile option **IBE: Thesaurus File Name** to an existing file that must be present in the file system.

Responsibility

None

Navigation

None

Steps

1. Create a synonym file ("thesaurus") for the Oracle iStore 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.

6.8.10 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.

Prerequisites

None

Responsibility

None

Navigation

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&
```

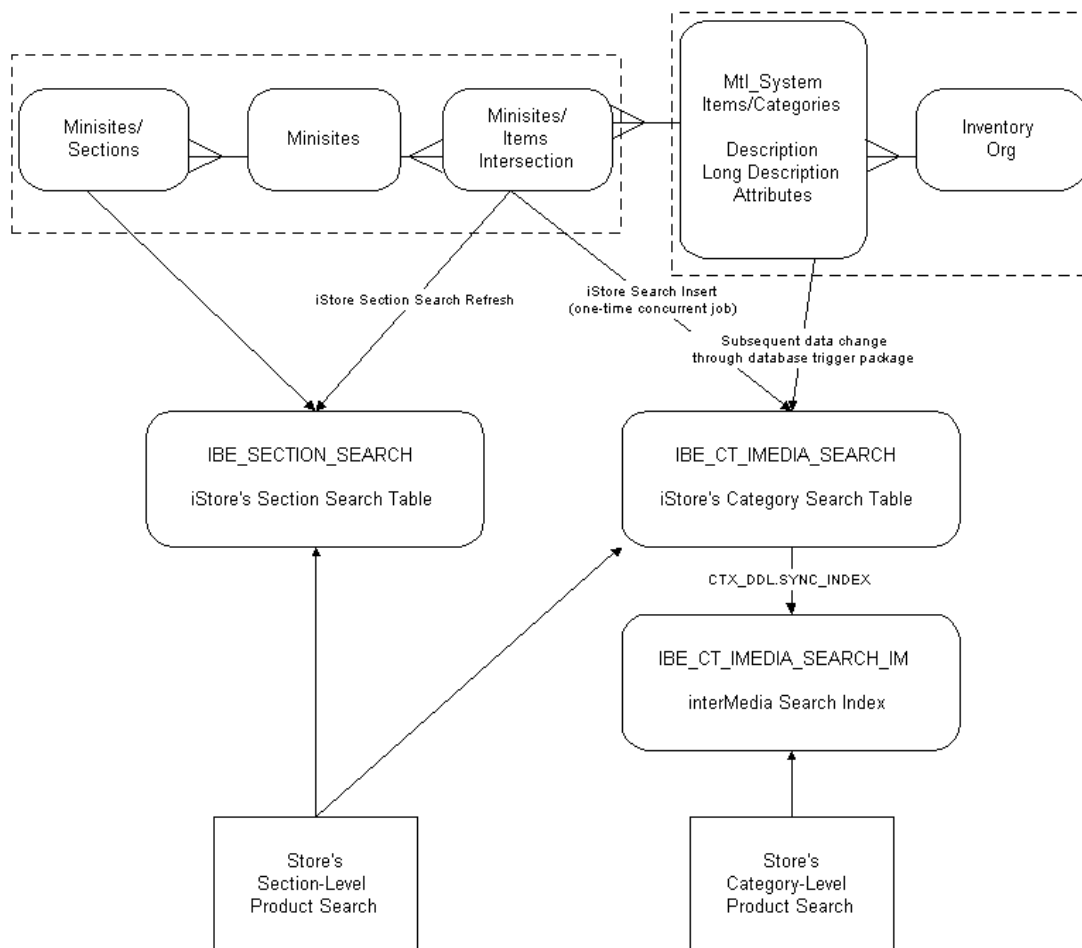
6.8.11 PL/SQL, Java, and JSPs Involved in Search

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 6–4 Oracle iStore Search Tables



6.8.12 Customizing Search

If you want to add more item attributes to the search parameters, 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'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'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 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 product search process.

6.8.13 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.

Implementing Customer UI Catalog

This chapter contains information on how to implement the Customer UI product catalog in Oracle iStore 11*i*, including creating the section hierarchy and adding products to the sections.

Note: This chapter assumes you have performed the mandatory setups listed in:

- [Chapter 2, "Before You Begin"](#)
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#)
- [Chapter 6, "Implementing Products"](#)

Main topics in this chapter include:

- [Store Sections Overview](#)
- [Section and Product Display Templates](#)
- [Creating and Maintaining Sections](#)
- [Maintaining Products in Sections](#)
- [Using Product Relationships](#)
- [Setting up Section Display Templates Text Messages](#)

7.1 Store Sections Overview

Oracle iStore's section hierarchy allows you organize your stores into logical sections connected in parent-child relationships, and to re-use these sections, their product associations, and their content in multiple stores.

The majority of section creation and maintenance tasks are performed using the **Sections** and **Products** pages accessible within the **Catalog** tab in the Store Administration UI.

In combination with the Display Templates, your store sections --- connected in a hierarchal fashion -- help determine the browsing path for the customer in your Customer UI specialty stores. All driven from the main **Root** section, together the sections, subsections, and products in your stores form a tree-like structure with which you present your product catalog. Once you create a section, you can use it in any number of stores. You also can choose to exclude certain sections from stores.

Using the **Sections** pages, you can:

- Create sections
- Duplicate existing sections, including all products and content
- Assign Display Templates to sections to determine the layout of the sections
- Assign products to sections -- either automatically or manually
- Assign or exclude sections to/from store(s)
- Preview sections in the context of the specialty store(s) in which they will appear
- Delete sections
- Rename sections
- Use the search utility to search for sections

Topics in this section include:

- [Section 7.1.1, "Implementing Sections"](#)
- [Section 7.1.2, "Section Hierarchy Guidelines and Behavior"](#)
- [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#)
- [Section 7.1.4, "Section Statuses: Published or Unpublished"](#)
- [Section 7.1.5, "Product Statuses: Published or Unpublished"](#)

See also:

- [Section 7.2, "Understanding Section Display"](#), for an introduction to section display concepts.
- [Section 7.3, "Section and Product Display Templates"](#), for information on the section and product Display Templates.
- [Section 7.4, "Creating and Maintaining Sections"](#), for instructions on working with sections.

- [Section 7.5, "Maintaining Products in Sections"](#), for instructions on working with products.

7.1.1 Implementing Sections

In your initial implementation, the section hierarchy will consist of a single parent node, called **Root**. To this single node, you can add as many subsections as you wish, as long as you follow certain rules for section type (see [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#)). Your products "hang" upon the sections and subsections of the hierarchal tree.

Each store that you create must point to a single node of the section hierarchy --- this can be either the main Root node or one of the other main or subsections that you create. In the specialty stores that include the section, the stores' navigation is driven from the first top-level section in the hierarchy.

7.1.2 Section Hierarchy Guidelines and Behavior

Consider the following section hierarchy guidelines and behavior when working with sections:

- Set up the top-level sections in the section hierarchy first. See [Section 7.4, "Creating and Maintaining Sections"](#), for steps.
- Each top-level section will have the main **Root** node as its parent.
- For each top-level section, you can create as many subsections as you wish. Each subsection also can have as many other subsections as you wish, as long as you follow the rules for section types; see [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#), for these rules.
- In the Customer UI, the Store Home Page will display the first navigational subsection under the Root section, not the root section page itself.
- To present Featured sections on the Store Home Page, make them subsections of the first navigational subsection.
- You can create groups of featured products at any level in the hierarchy by creating a subsection of type Featured in a navigational section and then adding products to that Featured section.
- You assign individual products to sections manually in the **Products** pages. You also can use the autoplacement functionality to populate Leaf sections with products from Inventory categories. See [Section 7.5.4, "Adding Products to](#)

[Sections Using the Products Pages](#)", and [Section 6.6, "Using Product Autoplacement"](#), for details.

- The top-level sections appear as tabs across the top of the Customer UI web store, while the lower level sections appear in the Browse Bin on the left side of the website. Tab and subtab appearance can be controlled by setting profile options. See [Section 7.2.1, "Setting Section and Product Display Profile Options"](#), for details.
- A Featured 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.
- You can add multiple products to a section at one time, using the Products pages. See [Section 7.5.4, "Adding Products to Sections Using the Products Pages"](#), for details.
- A Navigational section can contain either products or subsections, but not both. A Featured section can only contain products. See [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#), for details.
- Products will not appear in the Customer UI unless you publish them in a published section appearing in a published store. Also, the effective dates of the products, sections, and stores must be valid to appear in the Customer UI. See the following sections for details:
 - [Section 7.1.5, "Product Statuses: Published or Unpublished"](#)
 - [Section 7.1.4, "Section Statuses: Published or Unpublished"](#)
 - [Section 4.2, "Creating Stores"](#)

7.1.3 Section Types: Featured, Navigational, and Leaf

Store sections are of two basic types: Featured and Navigational. A third category, Leaf, can be of either main type, depending upon its placement in the hierarchy. See below for details.

Featured section:

- Appears on the home page of its parent section
- Contains products only
- Cannot have subsections

Navigational section:

- Appears as a hyperlink in the browsing map of its parent section -- user must select the section hyperlink to view the section
- Can contain products or subsections, **but not both**

Leaf section:

Within these two types, a section also can be characterized as a **leaf** section. Following are the leaf section characteristics:

- The leaf section is always the ending section or sections on a hierarchy branch, and thus never has subsections.
- The leaf section can be a Featured or a Navigational type of section.
- The leaf section's main purpose is for usage with Oracle iStore's Product Autoplacement feature.

Note that a leaf section is a logical definition, and not a section attribute that you can define in iStore.

See [Section 6.6, "Using Product Autoplacement"](#), for more details.

7.1.4 Section Statuses: Published or Unpublished

Before a section is available to customers in the Customer UI, you must flag the section as **Published** and save changes by pressing the **Apply** button. Unpublished sections can never be seen by customers.

- **Published section:**

- Section and any **published** child sections or products are visible in both the Customer UI and Store Administration UI. In the Store Administration UI, the store administrator uses **Preview** mode to preview a section and its child sections in the context of a specialty store.

Note: In Preview mode, only specialty stores which support the administrator's current session language will display. See [Section 18.1.2, "Using Preview Mode"](#), for more information.

- When publishing a section, the **Apply status to all descendant sections** checkbox in the **Create/Update Section** page enables you to publish the current section and all descendant sections (but not products) at the same time.
- **Unpublished section:**

- Unpublished Sections and all child sections or products are **not** visible in the Customer UI, unless being viewed by the store administrator (i.e., a user logged in with the iStore Administrator or equivalent responsibility).
- Sections and all child sections or products (whether published or unpublished) also are viewable by the merchant administrator through the use of **Preview** mode (selecting the Preview button in Store Administration UI pages).

7.1.5 Product Statuses: Published or Unpublished

While working with the product catalog, you can determine whether or not to change the status of an Inventory product to Published or Unpublished. Only Published products are able to display in the Customer UI, unless the store administrator is using Preview mode.

Setting a product's Publishing/Unpublished status in the Oracle iStore Store Administration UI is the same as changing the product's Web Status setting in Oracle Inventory.

Below are the definitions of the product statuses:

- **Published products** ---- Only Published products can display in the Customer UI, unless the store administrator is using Preview mode. Remember that a Published product also must be: (1) listed in at least one Published section, and (2) that section is in an active store accessible to a user.
- **Unpublished products** ---- An Unpublished product is not available in the Customer UI to end users. It will display, however, in Preview mode.

Note: Oracle Inventory allows users to set a Web Status of Disabled. Products in status Disabled cannot be queried in the Store Administration UI nor assigned to sections. Setting a product's Web Status to Disabled in Inventory will make products disappear in both the Store Administration and Customer UIs.

7.2 Understanding Section Display

Sections and their associated products display in the Customer UI in the context of the Display Templates in which they appear. In addition to the Display Templates, section appearance is affected by the structure of your section hierarchy, any section-product associations, and any content you have associated to a section or product.

Topics in this section include:

- [Section 7.2.1, "Setting Section and Product Display Profile Options"](#)
- [Section 7.3.1, "Section Display Templates"](#)
- [Section 7.3.2, "Product Display Templates"](#)

For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

7.2.1 Setting Section and Product Display Profile Options

Several profile options control how sections and products appear in the specialty store sections. These are discussed in this section.

See [Section A.2, "How to Set Profile Options"](#), for instructions on how to set profile options.

7.2.1.1 Setting the Number of Home Page Tabs and Subtabs

The top-level sections off of the Root node in the section hierarchy become tabs across the top of the Store Home Page. The second-level sections in the hierarchy become the subtabs across the top of the Store Home Page.

The number tabs and subtabs is controlled by the following profile options:

- **IBE: Number of Menu Tabs** --- This profile option specifies the number of menu tabs across the top of the Store Home Page.
- **IBE: Number of Menu Subtabs** --- This profile option specifies the number of menu subtabs below the menu tabs on the Store Home Page.

Each of these profile options defaults to **5** if not set. These should be set at the iStore application level.

7.2.1.2 Setting the Number of Child Sections Per Page

The following profile option allows you to set the maximum number of subsections to display on a page before the subsections fall to a new page. Users reach the continuation page through the "Next" link that Oracle iStore automatically includes in the section page.

- **IBE: Sections Per Page for Display** --- This profile option specifies the total number of subsections to display 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 showing the additional subsections.

By default, this profile option's value is **Null**. You may set it to an integer. If no value is set, the number of subsections per page is not limited. This should be set at the iStore application level.

7.2.1.3 Displaying the Section Path

The following profile option determines whether the section path displays in those catalog templates which can display a section path:

- **IBE: Use Section Path** --- This profile option specifies whether the section path is displayed on section and item pages in the default location specified by the template being used to display the section or item. Possible values: Yes/No.

The default value for this profile option is **Yes**. This should be set at the iStore application level.

7.2.1.4 Displaying the Section Browse Bin

The following profile option determines whether the section Browse Bin is displayed on section pages in its default location.

- **IBE: Use Section Bin** --- Specifies whether the section Browse Bin is displayed on section pages in its default location at the left-hand side of the catalog page. This navigational bin displays hyperlinks of the top-level section names. Possible values: Yes/No.

The default value for this profile option is **Yes**. This should be set at the iStore application level.

More information on the Browse Bin can be found in [Section 5.4.2, "Browse Bin on Store Pages"](#).

7.2.1.5 Displaying a Set Number of Items in Leaf Sections

The following profile option specifies number of items to display in Leaf sections of the hierarchy (the ending sections of a node).

- **IBE: Items Per Page for Display** --- Specifies the number of products to display in a Leaf section. Set to an integer.

The default value is **20**. This should be set at the iStore application level.

7.2.1.6 Displaying a Set Number of Items in Sections

The following profile option specifies number of items to display in sections of the hierarchy that contain products.

- **IBE: Items Per Section for Display** --- Specifies the maximum number of products to display per section. If no value is set, all items in a section will display. Set to an integer.

The default value is **Null**. If no value is set, all items in a section will display. This should be set at the iStore application level.

7.2.1.7 Displaying a Set Number of Items in Multiple-Section Template

The following profile option specifies the number of items (products) to display per section in Display Templates that show multiple sections.

- **IBE: Lines Per Section for Multiple Section Display** --- Specifies the number of items to display per section when multiple sections display on a page. Set to an integer. If no value is set, IBE: Items Per Page for Display is used.

The default value is **Null**. This should be set at the iStore application level.

7.3 Section and Product Display Templates

In determining the layout of your sections and their products through the use of Display Templates, the following are the options:

- **Default Template** --- Use the default Display Template for the section or product. The default templates can be found in [Section 7.3.1, "Section Display Templates"](#), and [Section 7.3.2, "Product Display Templates"](#).
- **Template Gallery** --- Use a Display Template from the gallery of existing, seeded section and product Display Templates. See [Section 7.3.1, "Section Display Templates"](#), for information about the seeded section Display Templates, and [Section 7.3.2, "Product Display Templates"](#), for information about the seeded product Display Templates.
- **Custom Templates** --- Use a customized Display Template. See [Appendix D, "Advanced Display"](#).

See [Section 8.1, "Understanding Customer UI Page Display"](#), for an introduction to Customer UI display.

7.3.1 Section Display Templates

Within the Oracle iStore Display Templates are those that are meant to be used only for sections. This section lists the seeded templates for sections. Section Display Templates are categorized by the type of section they will display (specified by the *Applicable to* designation of the template).

For steps on how to assign templates to sections, see [Section 7.4.6, "Setting Display Templates for Sections"](#).

Seeded section template *Applicable to* categories are:

1. **Section Contains Featured Subsection** -- For a list of templates in this category, see [Section 7.3.1.1, "Section Templates - Section Contains Featured Subsection"](#).
2. **Section Contains Navigational Subsections Only** -- For a list of templates in this category, see [Section 7.3.1.2, "Section Templates - Section Contains Navigational Subsections Only"](#).
3. **Section Contains Products Only** -- For a list of templates in this category, see [Section 7.3.1.3, "Section Templates - Section Contains Products Only"](#).

Note: For backward compatibility purposes, a fourth category exists: **Uncategorized section display templates**. This category is for templates which have been migrated over during an upgrade.

7.3.1.1 Section Templates - Section Contains Featured Subsection

The following section templates are applicable to those sections which contain Featured subsections:

- [Product Detail](#)
- [Product Multi-Select](#)
- [Product Multi-Select with Section Links](#)

Note: With this category, the section itself also can have other Navigational subsections. For this type of template, the main (parent) section itself is never rendered, because when the user clicks the parent section, the page flow automatically routes the user to the Featured subsection.

Product Detail

This template shows:

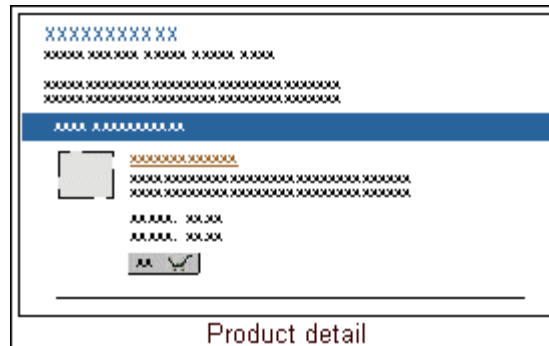
- Parent section short description
- Parent section long description
- Parent section additional information
- Product names
- Product images
- Product descriptions

The programmatic access name is: STORE_CTLG_FSUBSCT

By default, this template is mapped to the following JSP: ibeCCtpFSubSct.jsp

The graphic below shows the Product Detail section Display Template.

Figure 7-1 Product Detail Section Display Template



Note: This also is the default template for this category (Section Contains Featured Subsection).

Product Multi-Select

This template shows:

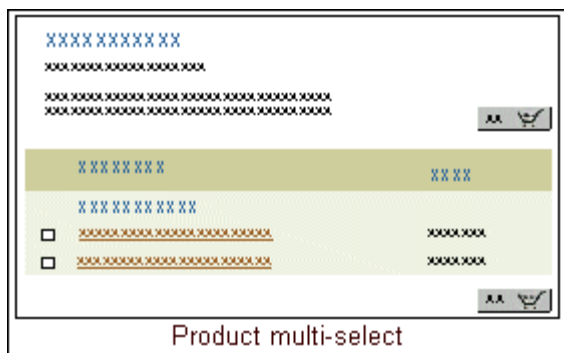
- Parent section short description
- Parent section long description
- Parent section additional information
- Product multi-selection option

The programmatic access name is: STORE_CTLG_FSUBSCT_MULT_2COL

By default, this template is mapped to the following JSP: ibeCCtpFSuStMs2.jsp

The graphic below shows the Product Detail section Display Template.

Figure 7-2 Product Multi-Select Section Display Template



Note: If you use this section Display Template, you must change the seeded text message that displays. See [Section 7.7, "Setting up Section Display Templates Text Messages"](#).

Product Multi-Select with Section Links

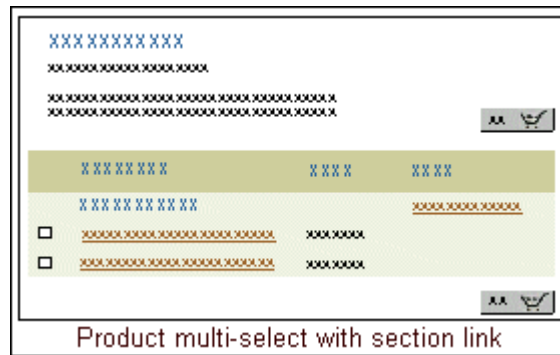
This template shows:

- Section short description
- Section long description
- Section additional information
- Product multi-selection option
- Section link

The programmatic access name is: STORE_CTLG_FSUBSCT_MULT_3COL

By default, this template is mapped to the following JSP: ibeCCtdFSuStMs3.jsp

The graphic below shows the Product Multi-Select with Section Links section Display Template.

Figure 7–3 Product Multi-Select with Section Links Section Display Template

Note: If you use this section Display Template, you must change the seeded text message that displays. See [Section 7.7, "Setting up Section Display Templates Text Messages"](#).

7.3.1.2 Section Templates - Section Contains Navigational Subsections Only

The following section templates are applicable to those sections which contain Navigational subsections only:

- [Subsection List](#)
- [Subsection List 2](#)
- [Subsection List \(Multi-Level\)](#)
- [Subsection List with Product Detail](#)
- [Subsection List with Product Pull-Down List](#)

Subsection List

This template shows:

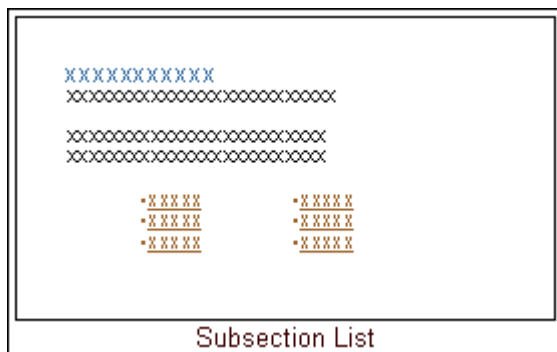
- Parent section short description
- Parent section long description
- Parent section additional information
- List of subsections as drill-down hyperlinks

The programmatic access name is: STORE_CTLG_SCT_BULLET_SUBSCT.

By default, this template is mapped to the following JSP: ibeCCTpStBlSuSt.jsp.

The graphic below shows the Subsection List section Display Template.

Figure 7–4 Subsection List Section Display Template



Note: This is also the default section template for this category (Section Contains Navigational Subsections Only).

Subsection List 2

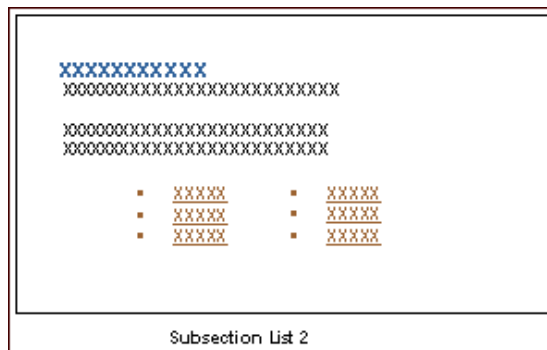
This template shows:

- Parent section name
- Parent section short description
- Section additional information
- List of subsections

The programmatic access name is: STORE_CTLG_SCTN_BULLET_SUBSCT.

By default, this template is mapped to the following JSP: ibeCCtpStNBISuSt.jsp.

The graphic below shows the Subsection List 2 section Display Template.

Figure 7–5 Subsection List 2 Section Display Template**Subsection List (Multi-Level)**

This template shows:

- Parent section short description
- Subsections names
- Subsections short description
- Children sections of subsections with drill-down links

The programmatic access name is: STORE_CTLG_DLDN_SCT_BULLET.

By default, this template is mapped to the following JSP: ibeCCtpDdLfStBl.jsp.

The graphic below shows the Subsection List (Multi-Level) section Display Template.

XXXXXXXXXXXX

XXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

- XXXXX
- XXXXX
- XXXXX
- XXXXX

XXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

- XXXXX
- XXXXX
- XXXXX
- XXXXX

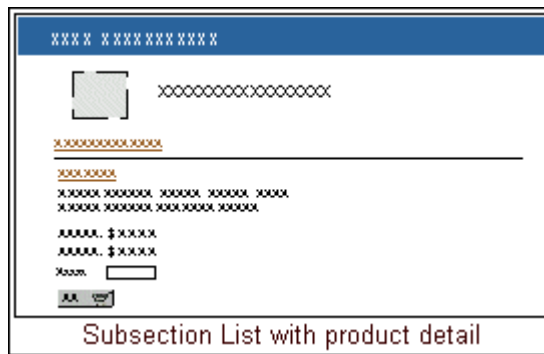
Subsection List (multi-level)

This template shows:

- Parent section name
- Parent section short description
- Parent section image
- Subsections and their product details

By default, this template is mapped to the following JSP: ibeCCTpDrillLeaf.jsp.

The graphic below shows the Subsection List with Product Detail section Display Template.

Figure 7–7 Subsection List with Product Detail Section Display Template

Subsection List with Product Pull-Down List

This template shows:

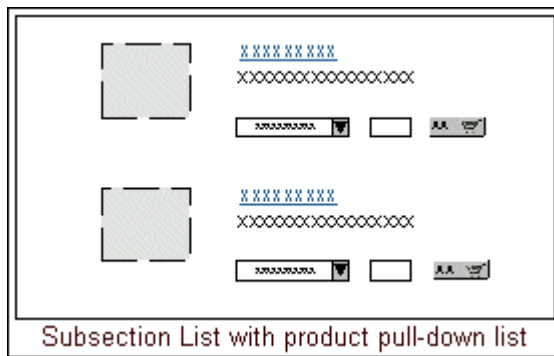
- Subsection names
- Subsection short descriptions
- Subsection images
- Product pull-down list

The programmatic access name is: STORE_CTLG_SUBSCT_DPDN_ITEMS.

By default, this template is mapped to the following JSP: ibeCCTpChStDdIts.jsp

The graphic below shows the Subsection List with Product Pull-Down section Display Template.

Figure 7–8 Subsection List with Product Pull-Down Section Display Template



7.3.1.3 Section Templates - Section Contains Products Only

The following section templates are applicable to those sections which contain only products:

- [Product Detail](#)
- [Product Pull-Down](#)
- [Product Detail Multi-Select](#)
- [Product Multi-Select](#)
- [Product Multi-Select with Drill-Down](#)

Product Detail

This template shows:

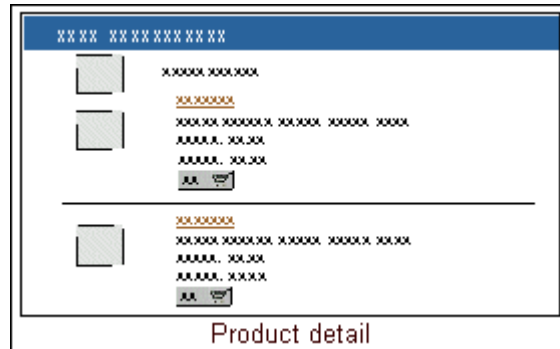
- Section name
- Section short description
- Section image
- Product names
- Product small images
- Product descriptions

The programmatic access name is: STORE_CTLG_LEAF_SCT_SINGLE.

By default, this template is mapped to the following JSP: ibeCCTpLeafSctSs.jsp.

The graphic below shows the Product Detail section Display Template.

Figure 7–9 Product Detail Section Display Template



Note: This is also the default section template for this category (Section Contains Products Only).

Product Pull-Down

This template shows:

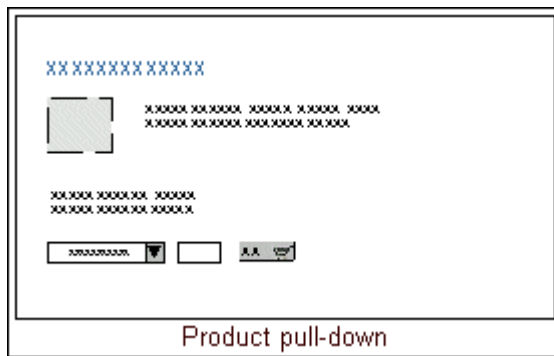
- Section name
- Section image
- Section long description
- Section additional information
- Product pull-down list

The programmatic access name is: STORE_CTLG_SCT_DTL_DPDN_ITEMS.

By default, this template is mapped to the following JSP: ibeCCtpStMmDtIts.jsp.

The graphic below shows the Product Pull-Down section Display Template.

Figure 7–10 Product Pull-Down Section Display Template



Product Detail Multi-Select

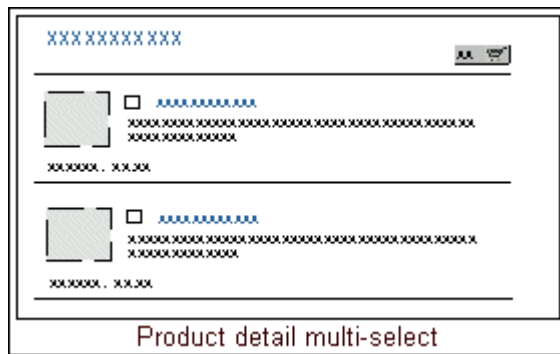
This template shows:

- Section short description
- Products multi-select option
- Product names
- Product small images
- Product descriptions

The programmatic access name is: STORE_CTLG_LEAF_SCT_ITEMS.

By default, this template is mapped to the following JSP: ibeCCtpLfStIts.jsp.

The graphic below shows the Product Detail Multi-Select section Display Template.

Figure 7–11 Product Detail Multi-Select Section Display Template

Product Multi-Select

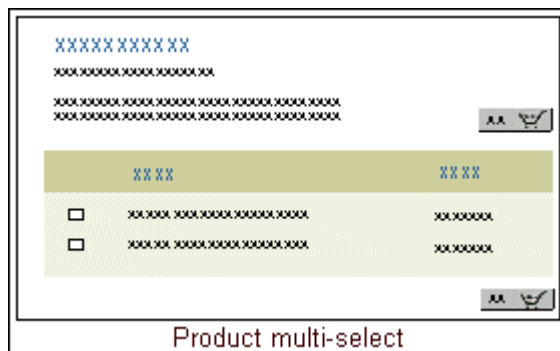
This template shows:

- Section short description
- Section long description
- Section additional information
- Products multi-select option

The programmatic access name is: STORE_CTLG_LF_SCT_MULT_NOLINKS.

By default, this template is mapped to the following JSP: ibeCCtpLfStMs.jsp.

The graphic below shows the Product Multi-Select section Display Template.

Figure 7–12 Product Multi-Select Section Display Template

This template shows:

- Section short desc

- The programmatic access name is: STORE CTLG LEAF SCT MULTIPLE.

By default, this template is mapped to the following JSP: `ibeCCtpLfStMsL.jsp`.

By default, this template is mapped to the following JSP: ibeCCtpLfStMsL.jsp.

The screenshot displays a web application interface. At the top, there is a header area with a title 'XXXXXXXXXXXX' and a list of product names. Below this, there is a table with three columns: 'XXXX', 'XXXX', and 'XXXX'. The first column contains two rows of data, each with a checkbox and a product name. The second column contains two empty input fields. The third column contains two rows of data, each with a product name. On the right side of the table, there is a button labeled 'ALL' with a dropdown arrow. At the bottom right, there is another button labeled 'ALL' with a dropdown arrow.

	XXXX	XXXX	XXXX
☐	XXXXXXXXXXXX		XX.XXXXXX
☐	XXXXXXXXXXXX		XX.XXXXXX

Product multi-select with drill-down

Within the Oracle iStore Display Templates are those that are applicable just for products.

Within the Oracle iStore Display Templates are those that are applicable just for products.

- Product Additional Information

- [Product Detail with Image](#)
- [Product Detail without Image](#)

For steps on how to assign templates, see [Section 7.5.7, "Setting Display Templates for Products"](#).

7.3.2.1 Product Additional Information

Use this template to display Featured products in a Featured section.

The programmatic access name is: STORE_CTLG_ITEM_INFO.

By default, this template is mapped to the following JSP: ibeCCtdItemInfo.jsp.

Note: This is a migrated Display Template which appears in the **Custom Display Template** LOV in the Template Gallery of the **Products > Display Template** page. No image of this template displays in the Template Gallery.

7.3.2.2 Product Basic Information

This template shows:

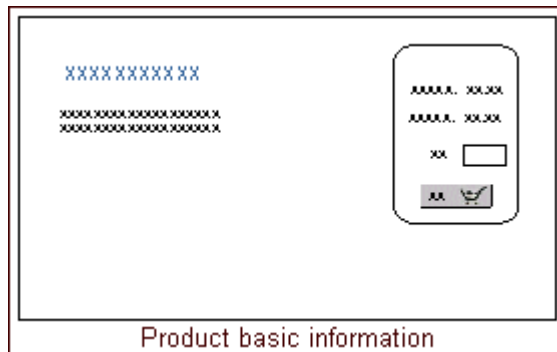
- Product name
- Product description

The programmatic access name is: STORE_CTLG_ITEM_DESC.

By default, this template is mapped to the following JSP: ibeCCtdItemDesc.jsp.

The graphic below shows the Product Basic Information Display Template.

Figure 7–14 Product Basic Information Display Template



7.3.2.3 Product Basic Information with Image

This template shows:

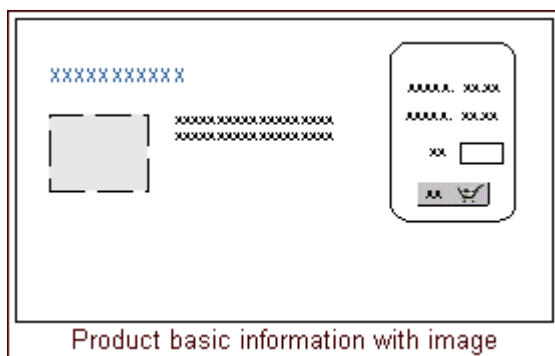
- Product name
- Product description
- Product large image

The programmatic access name is: STORE_CTLG_ITEM_DESC_AND_IMG.

By default, this template is mapped to the following JSP: ibeCCtdItemDescImg.jsp.

The graphic below shows the Product Basic Information with Image Display Template.

Figure 7–15 Product Basic Information with Image Display Template



7.3.2.4 Product Detail with Image

This template shows:

- Product name
- Product description
- Product large image
- Product additional information
- Product descriptive flexfields
- Related products

The programmatic access name is: STORE_CTLG_ITEM_DETAILS.

By default, this template is mapped to the following JSP: ibeCCtdItemDetail.jsp.

Note: This also is the default Display Template for products.

The graphic below shows the Product Basic Information with Image Display Template.

Figure 7–16 Product Detail with Image Display Template



7.3.2.5 Product Detail without Image

This template shows:

- Product name
- Product description
- Product additional information
- Product descriptive flexfields
- Related products

The programmatic access name is: STORE_CTLG_ITEM_DETAILS_NO_IMG.

By default, this template is mapped to the following JSP: ibeCCtdItemDtlNoImg.jsp.

The graphic below shows the Product Detail without Image Display Template.

Figure 7–17 Product Detail without Image Display Template



7.4 Creating and Maintaining Sections

This section contains information on section creation and maintenance. Topics include:

- [Section 7.4.1, "Creating Sections"](#)
- [Section 7.4.2, "Duplicating Sections"](#)
- [Section 7.4.4, "Assigning Sections to Stores"](#)
- [Section 7.4.3, "Adding Products to Sections Using the Sections Pages"](#)
- [Section 7.4.6, "Setting Display Templates for Sections"](#)
- [Section 7.4.5, "Adding Content to Sections"](#)
- [Section 7.4.7, "Setting the Display Order of Section Descendants"](#)
- [Section 7.4.8, "Using the Section Search Utility"](#)

Note: All of the steps in this section assume you will log in to the **Oracle iStore Store Administration UI** as the iStore administrator (store manager). Directions for setting up this user can be found in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).

For **product maintenance** tasks in the context of sections, see [Section 7.5, "Maintaining Products in Sections"](#).

Note on Categories page within the Section pages: The Categories page within the Sections menu is used for Oracle iStore's Product Autoplacement functionality only. See [Section 6.6, "Using Product Autoplacement"](#), for more information.

7.4.1 Creating Sections

Using the **Sections** pages within the Store Administration UI **Catalog** tab, you can create as many store sections as you wish.

Use the following procedure to create a section.

Note: In the Sections summary page, Catalog Hierarchy, you can use the **Focus** icon located next to section names to focus in on and work with a particular section or a section and its children.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in your store hierarchy.

Optionally, use the search utility to perform a Simple or Advanced search of the section hierarchy. See [Section 7.4.8, "Using the Section Search Utility"](#), for instructions.

2. To create a new section or subsection, select the **Create Sections** icon in the row of the parent section.

The graphic below shows the **Create Sections** icon in the **Sections** summary page.

Figure 7–18 Create Section Icon in Sections Summary Page



The **Create Section** page opens.

3. In the **Create Section** page, enter/set the following information (required fields are marked with an asterisk):
 - **Section Name** --- Enter the name of the section. This name will appear in the Customer UI.
 - **Section Code** --- Use this field to enter/update section code. Currently, section code will be useful only for your internal business purposes. Some of the section search screens allow you to search on this field. In addition, this code may be useful if you intend to customize iStore templates. For example, you could specify a section code to use as a name for the section

in a customized JSP. The code in this custom template could then refer to the section and access its information directly by using its section code.

- **Short Description** --- Enter a short description for the section. This text will display in the Customer UI underneath the section name, if being used by a template which can display this information.
- **Long Description** --- Enter a long description for the section. This text will display in the Customer UI underneath the section short description, if being used by a template which can display this information.
- **Keywords** --- Enter any keywords for the section in the Keywords textbox. After you enter them in the system, you can search by keywords using the search utility. Separate multiple keywords with commas.
- **Parent Section** --- Use the flashlight icon to launch the **Search and Select: Catalog Sections** page, where you can select the parent section for this section. By default, the **Search and Select: Catalog Sections** page sorts existing sections alphabetically by name. Sections of both Published and Unpublished statuses will display. To select a section in the list, activate its radio button and then press the **Select** button.

Optionally, in the **Search and Select: Catalog Sections** page, search for existing sections using **Section Name** or **Section Code** fields.

- **Featured Section** --- Select this checkbox to make this section a Featured section. **See:** [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#), for more information.
- **Status** --- Select either **Published** or **Unpublished**. **See:** [Section 7.1.4, "Section Statuses: Published or Unpublished"](#), for more information.
- **Apply status to all descendant sections** --- Select this checkbox to have all descendant sections of this section use the same Published/Unpublished status. De-select to allow each descendant section to have its own Status values defined.
- **Start Date** --- Select the calendar icon to enter/update the effective Start Date for the section. The section will be available in the Customer UI on the date you select here (providing the store containing the section also is valid.) This is a mandatory field.
- **End Date** --- Select the calendar icon to enter/update the effective End Date for the section. The section will be unavailable in the Customer UI on the date you select here.

4. Press the **Apply** button to save changes. The newly created section should appear within the Catalog Hierarchy list.

7.4.1.1 Deleting Sections

You can delete a section at any time by selecting the section in the **Catalog Hierarchy** page and then pressing the **Delete** button. When you delete a section, all children (subsections or products) are removed.

Note: You cannot delete a section from the section hierarchy if it is being used by a store. First you must remove the store, or remove the association between the store and the section.

7.4.2 Duplicating Sections

The Catalog Hierarchy with the **Sections** menu features the ability to duplicate any existing section or subsection (except the main Root section). When you duplicate a section, all data associated with the original section --- including parameters, children (subsections or products), templates, store assignments, and content --- are carried over to the new section.

Note: When a section is duplicated, all the subsections under the original section are duplicated. However, products, contents, and templates referenced by the section are not copied, only the reference links are copied. If the original section from which the copy was made is deleted, Oracle iStore still can access the data.

Use the following procedure to duplicate a section.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in your store hierarchy.

Optionally, use the search utility to perform a Simple or Advanced search of the section hierarchy. See [Section 7.4.8, "Using the Section Search Utility"](#), for instructions.

2. Select the radio button of the section to be duplicated, and select the **Duplicate** button. The **Duplicate Section** page displays.
3. In the **Duplicate Section** page, enter a new, unique name for the section in the **New Section Name** field. While functionally the name for the new section need not be unique, as a best practice, it is recommended that you do not use identical names for your sections.

4. Optionally, select a new **Parent Section** for the duplicated section. If you do not select a new parent, the original section's parent section will be the parent section.
5. Select the **Apply** button to save changes. The duplicated section and all of its children (if applicable) now should appear in the Catalog Hierarchy page.

7.4.3 Adding Products to Sections Using the Sections Pages

Within the Store Administration UI **Catalog** tab, you can add products to a section either through the **Sections** pages, through the **Products** pages. This section contains steps to add products to sections in the Sections pages.

For instructions on how to assign sections to a single product using the Products pages, see [Section 7.5.4, "Adding Products to Sections Using the Products Pages"](#).

You also can use Oracle iStore's Product Autoplacement feature to automatically add products to leaf sections. For information on using Oracle iStore's product autoplacement functionality, see [Section 6.6, "Using Product Autoplacement"](#)

Use the following procedure to add products to a section.

Prerequisites

- Products have been implemented. See [Chapter 6, "Implementing Products"](#), for details.
- The section to which products are being added has no subsections.

Steps

You can use this procedure to add one or several products at once to a single section.

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.
2. In the **Products** column, select the **Add Products** icon next to the section to which you are adding products. Only those sections which are candidates for products will display the icon. See [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#), for information about which types of sections can have products.

The graphic below shows the **Add Products** icon in the Sections Hierarchy page.

Figure 7–19 Add Products Icon

After you select the **Add Products** icon, the **Update Product Assignments** page appears, with information for the section that is being updated displaying at the top of the page, and the **Products** table showing all currently assigned products for this section in the lower portion of the page.

The graphic below shows the **Update Product Assignments** page.

Figure 7–20 Update Product Assignments Page

Update Product Assignments

Revert

Apply

Section Name

Subsection1 of A Test Section

Description

SHORT DESCRIPTION of Subsection1 of A Test Section

Hierarchy Path

Root/A Test Section/

Products

TIP

Save your work by clicking Apply before moving to another page.

Add Products to Section

Select a Product and ...

Remove

Select All | Select None

View

All

Go

Previous

1-10 of 11

Next 1

Select Product Number	Product Name	Published	Start Date	End Date
☐ AS54999	Sentinel Standard Desktop - Rugged	✓	12/Oct/2002	
☐ AS62444	Sentinel Upgrade Pack	✓	12/Oct/2002	
☐ AS62445	Envoy Upgrade Pack	✓	12/Oct/2002	
☐ AS65101	Vision Pad - Bronze	✓	12/Oct/2002	
☐ AS65102	Vision Pad - Silver	✓	12/Oct/2002	
☐ AS65103	Vision Pad - Gold	✓	12/Oct/2002	
☐ AS66311	Vision Pad DX - Mobile Computer	✓	12/Oct/2002	

Optionally, filter the product view by selecting a value in the **View** LOV. Options are: **All Products**, **Published Products**, or **Unpublished Products**.

- In the **Update Product Assignments** page, select the **Add Products to Section** button. The **Search and Select: Products** page appears, where you can search for and select the product(s) you wish to add to the section.

All products from your default product category set will display in the **Search and Select: Products** page. See [Section 6.3, "Guidelines and Considerations for](#)

[Oracle iStore Product Setup](#)", for more information about the products LOVs in the Store Administration UI.

Optionally, in the **Search and Select: Products** page, use the search utility to search for products by **Product Name** or **Product Number**. You may use % as a wildcard character, if desired. Press **Enter** or select the **Go** button to engage the search.

- **Product Number** relates to Item field in Oracle Inventory forms.
- **Product Name** relates to Description field in Oracle Inventory forms.

Select product(s) by activating the appropriate checkbox(es) in the **Select** column and pressing the **Select** button.

4. Once you have returned to the **Update Product Assignments** page, the products chosen in the previous step will display in the page, along with any other previously assigned products.

The **Start Date** field will be populated with the product's create date from Oracle Inventory. You can change this value if desired.

Note: When you change the start date of a product in iStore, the information is stored in the IBE (iStore) schema; you are not changing the creation date for the product in Oracle Inventory.

Optionally, select an **End Date** for the product using the calendar icon. A product whose End Date has passed will not appear in the Customer UI.

5. Select the **Apply** button to save the changes. The products are now assigned to the section.

Optionally, remove products from the section by selecting a product's checkbox and then selecting the **Remove** button.

Optionally, press the **Revert** button to undo any changes made in the screen. Note that Revert only works if you have not yet pressed the Apply button.

7.4.4 Assigning Sections to Stores

Use the **Update Section: Stores** page within the **Sections** menu to assign a section to one or more stores. By default, when you create a section, it will be included in the stores that its parent section is included in. However, you can choose which stores the section should apply to. Use the following procedure.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.

Optionally, use the search utility to perform a Simple or Advanced search of the section hierarchy. See [Section 7.4.8, "Using the Section Search Utility"](#), for instructions.

2. Select the **radio button** of the applicable section. Select the **Update** button. The **Update Section: Details** page appears.
3. Select the **Stores** hyperlink. The **Update Section: Stores** page appears, showing the section information at the top of the page.

In the **Store Exclusion** area, the *Included Stores* and *Excluded Stores* shuttle windows display the stores in which this section is included/excluded. By default, a newly created section will be automatically included in all stores to which its parent section belongs.

Important: If the profile option, **IBE: Use Catalog Exclusions**, is set to **No**, the sections will still show up in excluded stores. Be sure to set the profile option to **Yes** for the exclusion functionality to work properly.

4. Use the shuttle windows and the arrow keys to change the store assignments for the section.

Note: Only stores to which this section's parent section belongs are candidates for including this section in them. To include the section in other stores not in the list, you must change the parent section's store assignments or change the parent section assignment for this section.

5. Optionally, select the **Include this section in all future stores whose root section is an ancestor of this section** checkbox. This will make this section automatically included in other stores that you create whose root section is an ancestor of this section.
6. Select the **Apply** button to save changes.

The graphic below shows the **Update Section: Stores** page.

Figure 7–21 Update Section: Stores Page

Update Section: Stores

Section Name **Vision Computers**

Description

Hierarchy Path **Root/**

Store Exclusion

By default, this section is included in all stores the parent section belongs to. If you would like to exclude the section from one or more stores, you may do so below.

Existing Stores

Included Stores

Vision Computers US

Excluded Stores

Inclusion Rule

☒ Include this section in all future stores whose root section is an ancestor of this section.

7.4.5 Adding Content to Sections

You can use Oracle iStore's content components and media object functionality --- in combination with your own content source files --- to add content to sections.

See [Section 8.3, "Content Overview"](#), to learn the basics of how Oracle iStore can display content in your speciality stores.

Use the following procedure to add content to a section.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.
2. Select the **radio button** of the applicable section. Select the **Update** button. The **Update Section: Details** page appears.
3. Select the **Content** hyperlink. The **Update Section: Content** page appears.

The **Update Section: Content** page lists existing (seeded and non-seeded) content components that can be used for sections. Content components names appear in the **Select Media** area in the left area of the main portion of the screen. The following are the seeded content components that will display in this page:

- Product Large Image
- Product Small Image
- Section Small Image
- Section Additional Information

See [Section 8.4.1, "Seeded Content Components"](#), for a list and descriptions of seeded content components.

Note: Remember, if you use a non-seeded content component, you must modify the Display Template to use the new content component. See [Section D.5, "Advanced Content Tasks"](#), for more information.

4. In the list, find the content component that you wish to use, and map a media object to it: Select the flashlight icon to the right of the textbox to launch the **Search and Select: Media Object** page.
5. In the **Search and Select: Media Object** page select from a list of available media objects. To select a media object, activate the radio button of the object and press the **Select** button.

Optionally, in the **Search and Select: Media Object** page, search for media objects using the search utility. You can search by **Name**, **Programmatic Access Name**, **Keywords**, or **Description**. Enter text in the textbox. Use the % sign as a wildcard if desired. Press **Go** or **Enter** to launch the search.

Optionally, in the **Search and Select: Media Object** page, use the **View** LOV to view different classes of media objects (press **Go** to engage the filter after making your selection).

For more information about media objects classes, see [Section 8.3.2, "Media Objects and Content Components Classes"](#). For a list of the seeded media objects, see [Section E.13, "Media Objects"](#).

6. Once you return to the **Update Section: Content** page, the media object which you selected in the previous step will be displayed in the textbox next to the content component.
7. Press **Apply** to save changes.

Optionally, select the **Create Media Object icon** to create a new media object for use in the stores. The icon is located to the right of the flashlight icon. See [Section 8.5.3, "Creating New Media Objects"](#), for more information.

Optionally, select the **Show Details** hyperlink to show the content store/language mappings for the content and to add more content items.

In **Show** mode, you can:

- Select the **View Mapping** button to view any store/language mappings for the content associated to the media object, in the Media Object Details page. If no store/language mappings exist, then this button is de-active. Content must be mapped to the media object before mappings can be established.
 - Select the **Add Content** button to add a content item to the media object in the **Update Section: Add Content** page. If no media object has been selected, then this button is de-active. For steps, see [Section 8.5.4, "Assigning Content Items to Media Objects"](#).
8. If you have not already done so, map a content source file to the media object you selected in the steps above. You can do this from the **Catalog > Sections > Content** page by selecting the **Add Content** button. You also can map content from the **Content > Media Objects** pages. See [Section 8.5.4, "Assigning Content Items to Media Objects"](#), for steps.
 9. If desired, map the content item to specific store/language combinations. See [Section 8.5.4, "Assigning Content Items to Media Objects"](#), for steps.

The graphic below shows an excerpted portion of the **Update Section: Content** page, with a media object chosen for the Section Small Image seeded content component.

Figure 7–22 Update Section: Content Page with Media Object Mapped for Section

Section Small image

[Hide details](#)

Content

[View Mapping](#) [Add Content](#)

Previous 1-1 of 1 Next

Content Item	Version	Default	Update	Preview	Remove
/OA_MEDIA/EOS10007.gif					

7.4.6 Setting Display Templates for Sections

Using the **Display Template** page within the **Sections** pages, you can set Display Templates to control the appearance of your store sections. Each section can have its own Display Template mapping.

- See [Section 8.2, "Display Templates Overview"](#), for general information on Display Templates in Oracle iStore.
- See [Section 7.3, "Section and Product Display Templates"](#), for information on the section and product Display Templates.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.

Optionally, use the search utility to perform a Simple or Advanced search of the section hierarchy. See [Section 7.4.8, "Using the Section Search Utility"](#), for instructions.

2. Select the **radio button** of the section for which you are making Display Template assignments. Select the **Update** button. The **Update Section: Details** page appears.
3. Select the **Display Template** hyperlink. The **Update Section: Display Template** page appears. This page shows the section information at the top of the page and the **Select a Display Template** LOV in the middle of the page.
4. From the **Select a Display Template** LOV, select the appropriate Display Template **category** for this section. Section categories are described in

[Section 7.3.1, "Section Display Templates"](#). Press **Go** to apply your selection. The screen refreshes, with the templates available in the chosen category displaying in the Template Gallery.

- To use the default template, select the Default Template option.
 - If not using the default template, select a template's radio button.
5. Press **Apply** to save changes.

Optionally, you may select a custom Display Template for the section. Any custom Display Templates that you have created will display in the **Custom Display Template** LOV. Previously migrated templates also will display in this LOV.

Optionally, if you have enabled and set up Display Styles for your product categories, you may select one of these display styles from the **Select a Display Style** LOV in the **Product Display Style** area at the bottom of the page. For more information on Display Styles, see [Section D.5.3, "Using Display Styles for Default Display"](#).

7.4.7 Setting the Display Order of Section Descendants

Using the **Update Section: Display Order** pages within the **Catalog** tab, you can set the display order of a section's descendant sections -- whether subsections or products. This allows you to re-arrange the order of subsections or products without customizing the Display Template. Advanced users can use an SQL statement to order the products in the UI as well.

The **Display Order** pages change depending on which type of children a section has:

- **Subsections only** --- If the section has subsections only, then the sections will display in the re-order window. Plus, the **Advanced SQL** ordering option is **not** available.
- **Products only** --- If the section has products only, then the products will display in the re-order window, and the **Advanced SQL** option is available.

Note: You cannot enable the reordering of both products and sections simultaneously.

7.4.7.1 Using the Re-Order Shuttle to Order Section Descendants

Use the following steps to re-order a section's descendants using the re-order shuttle.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.
2. Select the **radio button** of the applicable section. Select the **Update** button. The **Update Section: Details** page appears.
3. Select the **Display Order** hyperlink. The **Update Section: Display Order** page appears.
4. Ensure that the **radio button** is enabled for the option: *Or use the reordering shuttle table below*.

Note that this will be the **only option available** if the section's descendants are **subsections** and not products.

5. In the shuttle windows, select the section descendants with your mouse and use the up and down arrows to set the order of the section descendants.
6. Select **Apply** to save changes.

The figure below shows the **Update Section: Display Order** page available when using the reordering shuttle to order a section's descendants.

Figure 7–23 Update Section: Display Order - Reorder List Page

Update Section: Display Order

Update the display order of any subsections or products as needed.

Preview

Revert

Apply

Section Name

Subsection1 of A Test Section

Description

SHORT DESCRIPTION of Subsection1 of A Test Section

Hierarchy Path

Root/A Test Section/

Product Display Order

You can use the simple reordering list provided below or you can use the advanced, SQL Order By Clause. The latter takes precedence.

☐ Advanced SQL

Go

☒ Or use the reordering shuttle table below:

Reorder List

Sentinel Standard Desktop - Rugged

Sentinal Upgrade Pack

Envoy Upgrade Pack

Vision Pad - Bronze

Vision Pad - Silver

Vision Pad - Gold

Vision Pad DX - Mobile Computer

Envoy Deluxe Laptop

Final Chip Assembly

Final Chip Assembly High Grade

15ft Printer Cable

⌕

⬆

⬇

⬆

⬇

7.4.7.2 Using SQL to Order Section Descendants

Advanced users may wish to use the **Update Section: Display Order - Order by Clause** page in the **Sections** menu to order products in a Featured section.

This page allows you to manually enter an SQL order by clause which will be used at runtime by the Customer UI, allowing the products to be displayed within the section template that you specify.

The SQL script can only contain column attributes of the MTL_SYSTEM_ITEMS table.

The order by clause must contain a list of columns with the sorting order, ascending or descending, for each column. The syntax is as follows:

```
COLUMN1 [ ASC | DESC ], COLUMN2 [ ASC | DESC], ...
```

Other syntaxes are not supported and will generate an error message in the specialty store.

Example -- A Section's Order By Clause

The following order by clause sorts items by creation date in descending order and description in ascending order:

```
CREATION_DATE DESC, DESCRIPTION ASC
```

Steps

Use the following steps to re-order a section's descendants using an SQL clause.

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.
2. Select the **radio button** of the applicable section. Select the **Update** button. The **Update Section: Details** page appears.
3. Select the **Display Order** hyperlink. The **Update Section: Display Order** page appears.
4. Ensure that **radio button** is enabled for the option: *Advanced SQL*. Note that this option will **not** be available if the section's descendants are **subsections** and not products.
5. Select the **Go** button. The **Update Section: Display Order - Order by Clause** page appears.
6. Enter the SQL clause in the **Order By Clause** window. Use the examples above to assist you.
7. Select **Apply** to save changes.

The figure below shows the **Update Section: Display Order** page available when using the order by clause option to order a section's products.

Figure 7–24 Update Section: Display Order - Order By Clause Page

Update Section: Display Order

Update product display order.

Section Name **Subsection1 of A Test Section**

Description **SHORT DESCRIPTION of Subsection1 of A Test Section**

Hierarchy Path **Root/A Test Section/**

Order By Clause

Enter an Order By Clause for automated ordering of products in a leaf section.

☒ **TIP** Enter the names of the column attribute(s) separated by comma.

Order By Clause

7.4.8 Using the Section Search Utility

Using the section search utility, you can perform Simple or Advanced searches of the section hierarchy. Use the following steps:

- [Section 7.4.8.1, "Steps for Simple Section Search"](#)
- [Section 7.4.8.2, "Steps for Advanced Section Search"](#)

7.4.8.1 Steps for Simple Section Search

Use the following steps to perform a Simple search of the section hierarchy:

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** page lists all sections and subsections in the store hierarchy.
2. You can search the section hierarchy by:
 - **Section Name**
 - **Section Code**
 - **Keywords** -- These are keywords you have entered and saved.
 - **Status** -- Enter Published or Unpublished.

In the search textbox, enter all or partial values. The search utility is case-insensitive. You may use % symbol as a wildcard if desired.
3. Press the **Enter** key or select the **Go** button to engage the search.

4. The search results are displayed in a table that allows you to access the **Update Section: Details** page for a particular section, by selecting the Section Name hyperlink in the table. You also can select the Hierarchy symbol in this table to re-navigate to the **Catalog Hierarchy** page.

7.4.8.2 Steps for Advanced Section Search

Use the following steps to perform an advanced search of the section hierarchy:

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Sections** subtab. The **Catalog Hierarchy** lists all sections and subsections in the store hierarchy.
2. Select the **Advanced** button. The Catalog Hierarchy, **Advanced Search** page displays.
3. In Advanced search, you can search the section hierarchy by:
 - **Section Creation Date** --- Use the calendar icon in the **From Date** and **To Date** fields to set date-related search criteria.
 - **Section Name**
 - **Section Code**
 - **Keywords** -- These are keywords you have entered and saved.

In the search textbox, enter all or partial values. The search utility is case-insensitive. You may use % symbol as a wildcard if desired.

4. Press the **Go** button to engage the advanced search.
5. The search results are displayed in a table that allows you to access the **Update Section: Details** page for a particular section, by selecting the Section Name hyperlink in the table. You also can select the Hierarchy symbol in this table to re-navigate to the **Catalog Hierarchy** page.

7.5 Maintaining Products in Sections

This section contains information on maintaining products within the section hierarchy. Topics include:

- [Section 7.5.1, "Products Summary Page"](#)
- [Section 7.5.2, "Previewing Products"](#)
- [Section 7.5.3, "Updating Product Details"](#)

- [Section 7.5.4, "Adding Products to Sections Using the Products Pages"](#)
- [Section 7.5.5, "Including or Excluding Products from Stores"](#)
- [Section 7.5.6, "Setting Content at the Product Level"](#)
- [Section 7.5.7, "Setting Display Templates for Products"](#)
- [Section 7.5.8, "Searching for Products"](#)
- [Section 7.5.9, "Guidelines and Behavior of Product Search"](#)

Note: All of the steps in this section assume you will log in to the **Oracle iStore Store Administration UI** as the iStore administrator (store manager). Directions for setting up this user can be found in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).

Product relationship information is in [Section 7.6, "Using Product Relationships"](#).

Additional product implementation and maintenance information can be found in [Chapter 6, "Implementing Products"](#).

Optional integration with Oracle Marketing can provide enhanced product functionality. See [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

7.5.1 Products Summary Page

Products of Published and Unpublished status will display in the **Products** summary page, accessible by navigating as follows: **Catalog > Products**. Following are some points about this screen:

- Published products show a checkmark in the **Published Products** status column. Products must be Published in order to display in the Customer UI.
- For Unpublished products, the **Published Products** status column will be blank.
- This screen's default search will retrieve all products of status Published/Unpublished.
- Products with a status of Disabled will not be displayed.
- The **Product Name**, **Product Number**, and **Creation Date** columns are sortable in ascending/descending order by selecting the column heading.
- The **Sections Assigned** and **Content Components** columns are drill-down hyperlinks that let you see the details of section and content component assignments.

The following figure shows the Products summary screen.

Figure 7–25 Products Summary Page

Products

Search

☒ **TIP** Use correct segment separator to search by product number.

Results

Select a Product and ...

View

All Products

1-10 of 647

Select	Product Number	Product Name	Sections Assigned	Content Components	Creation Date	Published Products
☒	4K_Desc_Item	4k long desc item	10	1	10/JUL/2002	
☐	A1 DOM	A1 Domestic Airline Container	3	0	17/JAN/1998	✓
☐	AG-model item	AG-model item	2	0	02/JUL/2002	✓
☐	AG-option class	AG-option class	5	0	02/JUL/2002	✓

7.5.2 Previewing Products

Oracle iStore's **Preview** mode allows the merchant to preview products in the context of the specialty store(s) that include the products.

Typically, Preview mode is accomplished by pressing the **Preview** button on applicable screens in the Store Administration UI.

All products -- whether of Published or Unpublished status --- will display in Preview mode. You cannot perform any transactions while in Preview mode.

- Note:** In Preview mode, only specialty stores which support the administrator's current session language will display. Also, Preview mode is not supported when accessing the Customer UI through Oracle 9iAS Web Cache. See [Section 18.1.2, "Using Preview Mode"](#), for more information.

7.5.3 Updating Product Details

In the Store Administration UI, you can update a product's basic information and set the Web Status (Published/Unpublished) flag.

Use the following procedure.

Steps

1. Log into the Store Administration UI and select the **Catalog** tab.
2. Select the **Products** subtab. The **Products** summary page displays.
3. Select the **radio button** of the applicable product. Select the **Update** button.
4. In the **Product Details** page, you can modify the following:
 - Product Name
 - Description
 - Web Status flag

See the following sections for more information:

- [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#)
 - [Section 7.1.5, "Product Statuses: Published or Unpublished"](#)
5. Select **Apply** to save the changes.

7.5.4 Adding Products to Sections Using the Products Pages

You can use this procedure to add a single product to multiple sections at the same time.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Products** subtab. The **Products** summary page displays, listing in a table all products in your default category set.

Optionally, search for products, using the steps in [Section 7.5.8, "Searching for Products"](#).

Optionally, filter the product view by selecting a value in the **View** LOV. Options are: **All Products**, **Published Products**, or **Unpublished Products**.

2. Select the radio button of the product you wish to update, and select the **Update** button. The **Update Product: Details** page appears.
3. In the left area of the page, select the **Sections** hyperlink. The **Update Product: Sections** page appears, showing all section assignments.

The graphic below shows the **Update Product: Sections** page.

Figure 7–26 Update Product: Sections Page

Update Product: Sections

Assign product to sections. Preview Revert Apply

Inventory Organization **Vision Operations**

Product Number **charlie100**

Product Name **charlie100**

Section Assignment Add Product to Sections

Section Code	Section Name	Parent	Start Date	End Date	Remove
root4 - Featured	Root1	24/Sep/2002			

Previous 1-1 of 1 Next

Previous 1-1 of 1 Next

4. To add the product to a section(s), select the **Add Product to Sections** button. The **Search and Select: Catalog Sections** page appears, where you can search for and select appropriate sections.

Optionally, use the search utility to search for sections by **Section Name** or **Section Code**. Enter text in the **textbox**. Use the % symbol as a wildcard if desired. Press **Enter** or select the **Go** button to launch the search.

Note that only those sections who are candidates for product assignment will display in the **Search and Select: Catalog Sections** page. See [Section 7.1, "Store Sections Overview"](#), for more information.

Use the **Select** checkboxes to select one or more sections, and press the **Select** button to save changes.

5. The product is now added to the section(s). Remember that the product, its section, and the store in which it appears must be in Published status and within valid dates to appear in the Customer UI.

7.5.5 Including or Excluding Products from Stores

By default, products are included in all stores which their parent section belongs to. You can exclude or include a product in specific store(s), using the following procedure.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Products** subtab. The **Products** summary page displays, listing in a table all products in your default category set.

Optionally, search for products, using the steps in [Section 7.5.8, "Searching for Products"](#).

Optionally, filter the product view by selecting a value in the **View LOV**. Options are: **All Products**, **Published Products**, or **Unpublished Products**.
2. Select the radio button of the product you wish to update, and select the **Update** button. The **Update Product: Details** page appears.
3. In the left area of the page, select the **Stores** hyperlink. The **Update Product: Stores** page appears, showing all store assignments for the product.
4. Use the **Included Stores** and **Excluded Stores** shuttle windows to flag which stores the product should be included in.
5. Select the **Apply** button to save changes.

The graphic below shows the **Update Product: Stores** page.

Figure 7–27 Update Product: Stores Page

Update Product: Stores

Inventory Organization: **Vision Operations**

Product Number: **75100006**

Product Name: **External Speakers**

Store Exclusion

By default, products are included in all stores which the parent sections belong to. If you would like to exclude the product from one or more stores, you may do so below.

Included Stores

- Vision Computers US
- Vision Store UK

> Move

>> Move All

< Remove

<< Remove All

Excluded Stores

7.5.6 Setting Content at the Product Level

You can use Oracle iStore's content components and media object functionality to map content (image files and html files) at the product level. Content mapped at the product level overrides all other mappings.

For more information on content components and media objects, see [Section 8.3, "Content Overview"](#).

Use the following procedure to set up content at the product level, using content component-media object relationships.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Products** subtab. The **Products** summary page displays, listing in a table all products within the default category set.

Optionally, search for products, using the steps in [Section 7.5.8, "Searching for Products"](#).

Optionally, filter the product view by selecting a value in the **View** LOV. Options are: **All Products**, **Published Products**, or **Unpublished Products**.

2. Select the **radio button** of the applicable product. Select the **Update** button. The **Update Product: Details** page appears.
3. Select the **Content** hyperlink. The **Update Product: Content** page appears.
The **Update Product: Content** page lists existing (seeded and non-seeded) product-class content components.

The following seeded content components will display in this page:

- Product Additional Information
- Product Large Image
- Product Small Image
- Section Small image

Note: Remember, if you use a non-seeded content component, you must modify the Display Template to use the new content component. See [Section D.5, "Advanced Content Tasks"](#), for more information.

See [Section 8.4.1, "Seeded Content Components"](#), for a list of and descriptions of the seeded content components.

4. In the list, find the content component that you wish to use, and map a media object to it: Select the flashlight **icon** to the right of the textbox to launch the **Search and Select: Media Object** page.
5. In the **Search and Select: Media Object** page select from a list of available media objects. To select a media object, activate the radio button of the object and press the **Select** button.

Optionally, in the **Search and Select: Media Object** page, search for media objects using the search utility in the **Search and Select: Media Object** page. You can search by **Name**, **Programmatic Access Name**, **Keywords**, or **Description**. Enter text in the textbox. Use the % sign as a wildcard if desired. Press **Go** or **Enter** to launch the search.

Optionally, in the **Search and Select: Media Object** page, use the **View** LOV to view different classes of media objects.

See [Section 8.3.2.2, "Seeded Media Object Classes"](#), for more information.

6. Once you have returned to the **Update Product: Content** page, the media object selected in the previous step will be displayed in the textbox next to the content component.
7. Press **Apply** to save changes.

Optionally, select the **Create Media Object icon** to create a new media object for use in the stores. The icon is located to the right of the flashlight icon. See [Section 8.5.3, "Creating New Media Objects"](#), for instructions. After creating the new media object, you can assign the content source file to the media object directly from the Product Content page.

Optionally, select the **Show Details** hyperlink to show the content store/language mappings for the content and to add more content items.

In **Show** mode, you can:

- Select the **View Mapping** button to view any store/language mappings for the content associated to the media object. If no store/language mappings exist, then this button is de-active. Content must be mapped to the media object before mappings can be established.
 - Select the **Add Content** button to add a content item to the media object in the **Update Product: Add Content** page. If no media object has been selected, then this button is de-active. For steps, see [Section 8.5.4, "Assigning Content Items to Media Objects"](#).
8. If you have not already done so, map a content source file to the media object you selected in the steps above. You can do this from the **Catalog > Products > Content** page by selecting the **Add Content** button. You also can map content from the **Content > Media Objects** pages. See [Section 8.5.4, "Assigning Content Items to Media Objects"](#), for steps.
 9. If desired, map the content item to specific store/language combinations. See [Section 8.5.4, "Assigning Content Items to Media Objects"](#), for steps.
 - Remember, the Display Template mapping for the product will determine whether the source file linked to the media object for the product can display. For the types of templates that can display product information, see [Section 7.3.2, "Product Display Templates"](#).

7.5.7 Setting Display Templates for Products

Use the following procedure to set the Display Template for a product. Product-level display settings override those made at the section level.

Steps

1. Log in to the Store Administration UI. Select the **Catalog** tab. Select the **Products** subtab. The **Products** page displays, listing in a table all products in your default category set.

Optionally, search for products, using the steps in [Section 7.5.8, "Searching for Products"](#).

Optionally, filter the product view by selecting a value in the **View** LOV. Options are: **All Products**, **Published Products**, or **Unpublished Products**.
2. Select the radio button of the product you wish to update, and select the **Update** button. The **Update Product: Details** page appears.
3. In the left area of the page, select the **Display Template** hyperlink. The **Update Product: Display Template** page appears.
4. In the **Select a Display Template for this product** LOV, select the **Select a Display Template** option.
5. Seeded product Display Templates will display in the gallery on the page. Select the radio button of the desired template. See [Section 7.3.2, "Product Display Templates"](#), for a list of seeded product display templates.
6. Press **Apply** to save changes.
7. Optionally, select the **Preview** button to preview the product display in the context of a specialty store. After you press Preview, all specialty stores in which this store is included will display -- limited to the specialty stores which support your current session language. Select the desired specialty store to preview the product.

7.5.8 Searching for Products

Store Administration users can perform both a Simple and an Advanced product search.

Note: The product database in the Store Administration UI is based on products within the Inventory Organization that matches the value of the profile option, **IBE: Item Validation Organization**, and from categories within the default category set, specified by the profile option, **IBE: Category Set**.

Use the following procedure to search in the Oracle iStore **Products** pages for Oracle Inventory items.

See [Section 7.5.9, "Guidelines and Behavior of Product Search"](#), for more information.

Prerequisites

- Required implementation tasks have been performed. See: [Chapter 4, "Implementation Tasks for Oracle iStore"](#).
- Products have been implemented. See [Section 6.1, "Products in Oracle iStore Overview"](#).

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

See [Section 7.5.8.2, "Steps for Advanced Search"](#), for advanced search steps.

7.5.8.1 Steps for Simple Search

1. Log into the Store Administration UI and select the **Catalog** tab.
2. Select the **Products** subtab. The **Products** page displays.
3. Select either **Product Name**, **Product Number**, or **Category** from the **Search** LOV.
 - See [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for details on how these fields map to fields in Oracle Inventory.
4. Enter your search criteria in the **Search** textbox, using full or partial values. Use the percent sign (%) as a wildcard if desired. The search textbox is case insensitive. See [Section 7.5.9, "Guidelines and Behavior of Product Search"](#), for more information.
5. Select the **Enter** key or press **Go** to launch the search.
6. A list of search results appears in the **Products** page.

You can sort the results by product number, product name, and creation date, by clicking on the corresponding name in the table headings. For example, to sort by product number, select the Product Number heading in the table.

7.5.8.2 Steps for Advanced Search

1. Log into the Store Administration UI and select the **Catalog** tab.
2. Select the **Products** subtab. The Products page displays.
3. Select the **Advanced Search** button.
4. Enter in the search textboxes the search criteria. Use the percent sign (%) as a wildcard if desired. The search textbox is case insensitive.

See [Section 7.5.9, "Guidelines and Behavior of Product Search"](#), for more information on product search behavior.

The searchable fields are:

- **Product Name** — Enter all or partial product name.
- **Product Number** — Enter all or partial product number.
- **Description** — Enter all or partial product description.
- **Category** — Enter all or partial Oracle Inventory category within the default category set.
- **Included Stores** — Select a store in which the product is included.
- **Start Date** — Use the calendar icon to select a product creation date.
- **End Date** — Use the calendar icon to select an end date for product creation.

See [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for details on how these fields map to fields in Oracle Inventory.

5. After entering your search criteria, select **Go**. A list of search results appears in the **Products** page.

You can sort the results by product number, product name, and creation date, by clicking on the corresponding name in the table headings. For example, to sort by product number, select the Product Number heading in the table.

The figure below shows the Products Advanced Search screen in Oracle iStore.

Figure 7–28 Products Advanced Search Page in Oracle iStore

Products

Search

Specify parameters and values to filter the data displayed in the results set.

☒ **TIP** Use correct segment separator to search by product number.

Product Number

Product Name

Description

Category

Included Stores

Start Date

End Date

7.5.9 Guidelines and Behavior of Product Search

Please keep the following guidelines and behavior in mind as you use the product search in the Store Administration UI.

- The product search in the Store Administration UI is based on products within the Inventory Organization that matches the value of the profile option, **IBE: Item Validation Organization**, and from categories within the default category set, specified by the profile option, **IBE: Category Set**.
- You can enter partial values and perform a search without using a wildcard, and the system will append the value you enter with a wildcard. Or you may use the percent sign (%) as a wildcard if desired, and the system will not append another wildcard.
- The search textbox is case insensitive.
- If the search textbox is left blank and the **Go** button is selected, a search for all values will be performed.

7.6 Using Product Relationships

Product relationships potentially allow you to increase sales by creating associations between products. You can use the seeded relationship type **Related** to offer a related product to a customer. In the Customer UI product detail pages, the relationships show up at the bottom of the page beneath the product they are related to.

Without customization, you can set up any combination of Related relationships between products, sections, and categories. To use any of the other 13 relationship types, you must customize the JSPs. See [Section D.7, "Advanced Product Relationships Procedures"](#), for more information.

Note that when you create associations between products and sections or categories, you are actually relating only the products within these categories and sections, not the categories or sections themselves. For example, if you set up a relationship between Product A and Section 1, Product A will be related to all of the products within Section 1. Likewise, if you set up an association between Category A and Category B, then it is the products within these categories that are associated in the Customer UI, not the categories themselves. If you wish to exclude some of the products within a related category or section, then you must use the exclusion feature. See [Section 7.6.2, "Using Relationship Product Exclusion/Inclusion Functionality"](#), for more information.

Display Templates to Show the Related Products

You must use one of the following seeded product Display Templates to display the Related relationship type:

- Product Detail Without Image
- Product Detail With Image

See [Section 7.3.2, "Product Display Templates"](#), for more information.

How to Map the Relationships

You can map relationships using one of two methods:

- **Relationship rules** created using the Oracle iStore rule builder --- See [Section 7.6.1, "Creating Relationships Using Mapping Rules"](#), for instructions.
- **SQL rules** to define relationships by querying the database on particular fields --- See [Section D.7, "Advanced Product Relationships Procedures"](#), for instructions.

Note: You cannot use both methods in a single relationship.

Caution: if you set up an SQL rule with a relationship type, you cannot delete it. You can, however, remove any mapping rules that you have set up.

Using the **Relationships** pages within the Store Administration UI, you can accomplish the following:

- Search for existing relationship types.
- View a list of all relationship types which exist in your organization's implementation.
- Access the **Create Relationship** page, where you can create a new relationship type.
- Access the **Relationship Details** page, where you can update existing relationship types and their mappings.
- Delete non-seeded relationship types.

7.6.1 Creating Relationships Using Mapping Rules

The mapping rules define relationships in a From - To form. The types of From and To objects can be:

- Oracle Inventory categories within the default category set
- Oracle Inventory products within the default category set
- Any type of Oracle iStore section

For more information on how Oracle iStore uses Inventory categories, see [Section 6.3.2, "Inventory Categories and the iStore Product Catalog"](#).

Oracle iStore evaluates each mapping rule you set up and then populates database table rows where the relationships are maintained. 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 creates a total of eight product relationships.

Use the following procedure to set up product relationships using mapping rules.

Note: Currently, only the **Related** relationship type is supported out-of-the-box.

Advanced relationship building information can be found in [Section D.7, "Advanced Product Relationships Procedures"](#).

Prerequisites

- Products have been set up to use in Oracle iStore. See [Chapter 6, "Implementing Products"](#), for details.

- Products in the relationship are mapped to the seeded product Display Template, [Product Detail without Image](#), in order to display the Related relationship type. See [Section 7.3.2, "Product Display Templates"](#), for more information.
- An SQL rule **has NOT been mapped** to the seeded Related relationship type.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Log in to the Store Administration UI and select the **Catalog** tab. Select the **Relationship** subtab. The **Relationship** page displays a summary of all relationships types in your organization's implementation.

Note: *Seeded* relationship types will have a **Remove** icon that is de-active. *Non-seeded* relationship types will display a viable **Remove** icon next to them for removal of the relationship type.

2. Find the relationship type you wish to map:
 - a. In the **Search for Relationship by Name** textbox, enter the name of the relationship and select **Go** to launch the search.
 - b. Or, scroll through the list of relationship types and find the relationship type.
3. Select the **Update** icon for the relationship type you are updating. The **Relationship Details** page appears.

Note: If **no** mapping rule or SQL rule exists for the relationship type, a LOV will display where you can select either **Create Mapping Rules** or **Create a SQL Rule**.

If mapping rules have been set up for the relationship type, the mapping rules will display in the Mapping Rule table.

If an SQL rule has been set up for this relationship type, you cannot create mapping rules for it.

4. To create a new rule when no mapping yet exists, select **Create Mapping Rules** from the LOV.

- 5. Optionally, use the calendar icon in the **Effective Date From** and **Effective Date To** fields to set up dates when the relationship type will be valid.
- 6. To add a mapping, press the **Add Rules** button. The **Add Rule** page opens.
- 7. In **Add Rule** page, the In the **From** and **To** LOVs, select the desired category, product, and section mappings.
 - **Category:** Relationship mapping rule is starting/ending at an Inventory category within the default category set. Use the flashlight icon to launch the **Search and Select: Categories** page.
 - **Product:** Relationship mapping rule is starting/ending at a product. Use the flashlight icon to launch the **Search and Select: Products** page.
 - **Section:** Relationship mapping rule is starting/ending at a section. Use the flashlight icon to launch the **Search and Select: Sections** page.
- 8. Select **Apply** to save changes.
- 9. Optionally, select the **View Results** to view a list of all product-to-product relationships that exist for the relationship type. In the **Product Relationships** page that appears, you can *exclude* specific products from the mapping or *include* products that have previously been excluded. **See:** [Section 7.6.2, "Using Relationship Product Exclusion/Inclusion Functionality"](#).

Figure 7–29 Relationships Add Rules Page

Add Rules

Previous1-5 of 5Next

From		To
Category		Category
Category		Category
Category		Category
Category		Category
Category		Category

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7.6.2 Using Relationship Product Exclusion/Inclusion Functionality

Once you have set up a mapping rule for a relationship type, you may wish to exclude specific products from the rule.

For example, you have set up a mapping from Product A to Category 1. Since the mapping will create relationships from Product A to all of the products in Category 1, you may wish to flag certain products as excluded from the relationship mapping rule. Use the following procedure.

Prerequisites

- A mapping rule has been created in which multiple products are captured.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Log in to the Store Administration UI and select the **Catalog** tab. Select the **Relationship** subtab. The **Relationship** page displays a summary of all relationships types in your organization's implementation.
2. Find the relationship type that contains the mapping, and select the **Update** icon to access the **Relationship Details** page.

The mapping rules will display in the Mapping Rule table.

3. Select the **View Results** button. The **Product Relationships** page appears.

The **Results** table will display all of the product relationships created by the mapping rule associated with the relationship type which you are updating. Products which are excluded will display a checkmark in the Excluded column.

4. To **exclude** a product or products from the mapping rule, select the **Select** checkbox of the appropriate products and press the **Exclude** button.

A checkmark will appear for the product(s) in the **Excluded** column of the table.

5. To **re-include** a product or products that have previously been excluded from the mapping rule, select the **Select** checkbox of the appropriate product(s) and press the **Include** button.

The checkmark in the **Excluded** column will disappear for the selected product(s).

7.7 Setting up Section Display Templates Text Messages

Two seeded Oracle iStore section Display Templates come with three non-usable FND_MESSAGES seeded as part of their display. If you use either of these section templates and their associated JSPs in a specialty store, you will want to change the seeded text messages.

The template gallery in the **Sections** pages display these templates as:

- [Product Multi-Select](#)
- [Product Multi-Select with Section Links](#)

If not altered, the seeded text messages will appear in these two templates as:

- Enter product header 1 alternative 1
- Enter product header 1 alternative 2
- Enter product header 3 alternative 1

The table below, Seeded Section Display Templates Requiring Text Message Setup, summarizes the names of the template JSP source files, their programmatic access names, and their descriptions.

Table 7–1 Seeded Section Display Templates Requiring Text Message Setup

Source File (JSP)	Programmatic Access Name	Description
ibeCCtdFSuStMs2I.jsp	STORE_CTLG_FSUBSCT_MULT_2COL_INCL	Non-leaf section featured products with multiple select two columns
ibeCCtdFSuStMs3I.jsp	STORE_CTLG_FSUBSCT_MULT_3COL_INCL	Non-leaf section featured products with multiple select three columns

The table below, Seeded Text Messages for Section Display Templates Requiring Text Message Setup, summarizes the referenced source files (JSPs), the seeded message display text, and the seeded programmatic access names for the seeded messages.

The three seeded messages that display in the two templates are:

Table 7–2 Seeded Text Messages for Section Display Templates Requiring Text Message Setup

Seeded Message(s) Display Text	Source File (JSP)	Programmatic Access Name
Enter product header 1 alternative 2 (Displays at the top of the left-hand column.)	ibeCCtdFSuStMs2I.jsp	IBE_PRMT_CT_PRODUCT_HDR1_ALT2
Enter product header 1 alternative 1 (Displays at the top of the left-hand column.)	ibeCCtdFSuStMs3I.jsp	IBE_PRMT_CT_PRODUCT_HDR1_ALT1
Enter product header 3 alternative 1 (Displays at the top of the right-hand column)	ibeCCtdFSuStMs3I.jsp	IBE_PRMT_CT_PRODUCT_HDR3_ALT1

Stored in Oracle Applications Message Dictionary, these messages are seeded in the FND_NEW_MESSAGES table.

Use the steps below to alter the display text.

7.7.1 Modifying the Seeded Text Messages for Templates

Use the following procedure to change the text of the seeded messages that display on ibeCCtdFSuStMs2I.jsp and ibeCCtdFSuStMs3I.jsp.

Prerequisites

None

Responsibility

Application Developer

Navigation

Log in to Oracle Forms.

Steps

- 1. Log in to Oracle Forms with the Application Developer responsibility.
- 2. Open the Messages window by choosing **Application > Messages**.
- 3. Open the Messages search window by choosing **View > Find**.
- 4. In the Find field, enter IBE_PRMT_CT_PRODUCT_HDR% and click **Find**.

The programmatic names of the three seeded messages will display in the Messages search results window.

5. Select the message that you want to modify and click **OK**. The Messages window is populated with the selected message.
6. In the Current Message Text area, select the seeded text and replace with your preferred text.
7. Save the form.

Guidelines

- Remember, alter these specific text messages only if you are using one of the following section Display Templates:
 - [Product Multi-Select](#)
 - [Product Multi-Select with Section Links](#)
- The Oracle convention for an Oracle iStore message name begins the name with **IBE**.
- You can find a specific message name by viewing the source code of the JSP file displaying it.
- It is recommended that you bounce the Apache server after making these changes.

Implementing Customer UI Display

This chapter contains information on how implement content display in the Oracle iStore 11*i* Customer UI pages, without customization.

Note: This chapter assumes you have performed the mandatory setups listed in:

- [Chapter 2, "Before You Begin"](#)
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#)
- [Chapter 6, "Implementing Products"](#)

Advanced display techniques --- including limited customizing information --- can be found in [Appendix D, "Advanced Display"](#).

Information on building the section and product catalog for the Customer UI can be found in [Chapter 7, "Implementing Customer UI Catalog"](#).

Topics in this chapter include:

- [Understanding Customer UI Page Display](#)
- [Display Templates Overview](#)
- [Content Overview](#)
- [Understanding Content Components](#)
- [Understanding Media Objects](#)
- [Using the Content Repository](#)

8.1 Understanding Customer UI Page Display

Oracle iStore utilizes JavaServer Pages™ (JSP™), which combine Application Programming Interfaces (APIs) to call dynamic data and HTML to present static

data. A robust PL/SQL layer interfaces with the Oracle database to provide consistent and accurate data storage and retrieval.

In the Customer UI, each web page is made up of an overall JSP (for example the seeded Store Home Page, `ibeCZzpHome.jsp`) that calls other JSPs to display the various areas of the page. Oracle iStore uses templates and other components to present the Customer UI, including:

- **Display Templates** --- The bulk of the Customer UI display is presented through the hundreds of Display Templates that are seeded in Oracle iStore. Display Templates are of various types, depending upon which areas of the Customer UI they are meant to display. See [Section 8.2, "Display Templates Overview"](#), for more information.
- **Section and Product Hierarchy** --- Using sections and their products organized into a hierarchical structure, your product catalog is presented through a powerful section and product catalog building tool. See [Chapter 7, "Implementing Customer UI Catalog"](#), for more information.
- **Content** --- Oracle iStore features flexible and reusable content tools. To present product images and html content in your specialty stores, you map content components to media objects, which are in turn linked to the content files. To present messages, you utilize hundreds of seeded text messages, some of which also are reusable media objects. See [Section 8.3, "Content Overview"](#), for more information.
- **Display Styles** --- Display styles can be linked to default templates and used to determine default page layout based on Oracle Inventory product categories. See [Section D.5.3, "Using Display Styles for Default Display"](#), for more information.

Although many customers do customize Oracle iStore, given the application's range of configuration options, customizing is not necessary. See *Oracle iStore API Reference Guide* for customizing information.

8.2 Display Templates Overview

This section contains general information on Display Template functionality within Oracle iStore. Topics include:

- [Section 8.2.1, "Display Templates Present the Customer UI"](#)
- [Section 8.2.2, "Display Template Categories"](#)
- [Section 8.2.3, "Display Template Characteristics"](#)

- [Section 8.2.4, "Mapping Source Files to Display Templates"](#)
- [Section 8.2.5, "Creating New Display Templates"](#)

8.2.1 Display Templates Present the Customer UI

Oracle iStore comes seeded with over 650 Display Templates that present the Customer UI pages. In addition, you can create your own templates for use in the stores. Each template has a specific display purpose, depending upon which elements of the UI they are meant to display. Some examples and behavior of the seeded templates include:

- Section presentation templates
- Product presentation templates
- Shopping cart templates
- Checkout templates
- Order-tracking templates
- Containers known as bins, such as the Welcome bin, the Browse bin, and shopping cart page bins
- Address book templates
- User management templates

In order for a Display Template to present an element of the Customer UI, it must link to a source file --- this is where its content comes from. This source file typically is a Java Server Page (JSP). The seeded Display Templates that present the default, out-of-the-box Customer UI are linked to source JSPs. Other templates are left without source JSP files, so that you can configure your own Customer UI presentation with your own source JSPs.

Many of Oracle iStore's Display Templates can use logical media objects and content components to present image and html content. These can be any type of image file, such as .gif, .jpg, .bmp, etc., or html content in the form of .htm files. Some of the Display Templates present this type of content by calling the seeded content components that are located within them. Each content component is mapped to a logical media object, which is in turn mapped to the physical source content file (ex.: .gif, .htm, etc.). Each Display Template, depending upon its usage, contains the programmatic access names of specific content components. It uses these programmatic access names to call the components. Other Display Templates can call media objects directly.

8.2.2 Display Template Categories

Display Templates are categorized by the type of display they enable in a web store. The seeded templates are categorized as follows:

- **Product** --- For templates which display products only.
- **Section Contains Navigational Subsections Only** --- For templates that will display sections which only contain Navigational subsections and no Featured subsections.
- **Section Contains Featured Subsection** --- For templates that render Featured subsections. The section itself also can have other Navigational subsections. For this type of template, the main (parent) section itself is never rendered, because when the user clicks the parent section, the page flow automatically routes the user to the Featured subsection.
- **Section Contains Products Only** --- For templates that will display sections which contain products only, and no subsections.
- **Others** --- For all other templates, such as those that might be used to display checkout pages, order tracker pages, user management pages, product search pages, and so forth.
- **Uncategorized Section Display Templates** --- This category is used for backward compatibility only.

8.2.3 Display Template Characteristics

Display Templates have the following features:

- **Display Name** -- This is the template's name, to be used for your internal business purposes. The template name appears in the Store Administration UI, but cannot be seen in the Customer UI.
- **Programmatic access name** -- This is a unique code used by template processing pages to determine what to do with the template. The template programmatic access name appears in the Store Administration UI, but cannot be seen in the Customer UI.
- **Source files** -- Each template used in the Customer UI must have a source JSP mapped to it for each store/language mapping for which it will be used. The source JSP determines the content of the page area covered by the template.
- **Description** -- This is an internal description (e.g., meant for your own internal business purposes) that provides information about the use of the template. The

template description appears in the Store Administration UI, but cannot be seen in the Customer UI.

- **Keywords** -- After you enter them in the system, keywords can be used to search for templates in the Store Administration UI. These keywords cannot be seen by customers.
- **Applicable To** -- The *Applicable To* designation of a template is a display class that describes its purpose.

A complete list of templates can be found in [Appendix E, "Display Templates and Media Objects"](#).

8.2.4 Mapping Source Files to Display Templates

You can link your own JSP files to the seeded templates to present content that is not provided by the supplied source files.

Use the following procedure:

Steps

1. Log in to the Store Administration UI. Select the **Advanced** tab. Select the **Template Manager** subtab. The **Templates** page displays, listing in a table all templates in your implementation.

Optionally, use the search utility to search for templates by **Name**, **Programmatic Access Name**, **Keywords**, **Description**, or **Applicable To** designation. You may enter partial text in the textbox to narrow the search. Use the % sign as a wildcard if desired. Press **Enter** or **Go** to launch the search.
2. Select the **Update** icon for the template you wish to update. The **Update Template** page displays with any already mapped source files displaying in the **Source File(s)** area at the bottom of the page.
3. Select the **Add Source File** button. The **Add Source File** page appears.
4. Enter the source file name in the **Source File Name** textbox. You do not need to enter a directory, just the filename and extension.

Example: `sourcefile.jsp`

5. Select the default store from the **Store** LOV. Once you select a store, the **Language** LOV will become active with languages supported by the store you have selected.
6. Select a language from **Language** LOV.

Note: You can map the source file to All stores and All languages, or for multi-store and multi-language implementations, you can map to specific combinations of stores and languages.

7. Press **Apply** to save changes. The template is now mapped to the source file for the store-language combination that you have chosen.

8.2.5 Creating New Display Templates

You also can register your own templates to link with your own JSP files, in order to customize the presentation of the Customer UI display. See: [Appendix D, "Advanced Display"](#), for details.

8.3 Content Overview

Oracle iStore features reusable content tools which allow you to present content in the Customer UI. These content tools let you to map content source files to appear in the Customer UI, allowing you to provide more than just the section or product description information. The content you present in the Customer UI can be images, html files, or text messages.

The content tools also allow you to set default content based on Oracle Inventory categories. See [Section D.5.4, "Configuring Product Presentation at the Category Level"](#), for more information.

See also: [Section 8.3.1, "How Oracle iStore Determines Which Content to Display"](#).

The following content functionality is available in Oracle iStore:

- **Content Components** --- These are logical placeholders in the Display Templates for content associated to media objects. See [Section 8.4, "Understanding Content Components"](#), for more information.
- **Media Objects** --- Media objects are logical bridges that connect content component placeholders with source files to present images or html content in the Customer UI. Some media objects do not need to be linked to content components in order to be useful. See [Section 8.5, "Understanding Media Objects"](#), for more information.
- **Content Repository** --- The Content Repository allows you to view and upload the actual files that provide the content for your specialty store pages. See [Section 8.6, "Using the Content Repository"](#), for more information.

Integration with Oracle Content Manager can provide additional content capabilities. This optional integration is discussed in [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#).

Topics in this section include:

- [Section 8.3.1, "How Oracle iStore Determines Which Content to Display"](#)
- [Section 8.3.2, "Media Objects and Content Components Classes"](#)
- [Section 8.4.1, "Seeded Content Components"](#)
- [Section 8.5.1, "Using Media Objects to Present Message Text"](#)
- [Section 8.5.2, "Seeded Media Objects"](#)

8.3.1 How Oracle iStore Determines Which Content to Display

In some cases, the content you map for display in your specialty stores can overlap with content set at other levels. For example, you may set category-level default content, but then also set product-level content for a specific product. Oracle iStore follows certain rules for determining which content to display, based on the following three main levels:

- [Product-Level Content](#)
- [Category-Level Content](#)
- [Store- and Section-Level Content](#)

Oracle iStore checks for and then prioritizes the content display as follows:

1. If iStore finds content defined at the product-level, it displays it first. If no product-level content is found, category-level default content is used.
2. If iStore finds content defined at section-level, it displays it. Otherwise, store-level content is used.
3. If no content exists for any of the other levels, then store-level default content is used.

8.3.1.1 Product-Level Content

Product-level content occurs when, in the **Products > Content** page, you link content components to media objects, which are in turn mapped to content files.

Oracle iStore always uses the product-level content in favor of any other associations to content defined at other levels. After product-level, Oracle iStore

uses any category-level content associations. If no category-level content is mapped, then the store-level content is used.

8.3.1.2 Category-Level Content

Pages associated with the product or category will use this media object instead of the store-level media.

Note: Only the content components whose Class designation is Section will show in the Section Content page, and only those content components whose Class designation is Product will show in the Product Content page. Normally, the media object associated with a content component in Sections page can not be used by a product.

8.3.1.3 Store- and Section-Level Content

The rules that determine the display of section-level content has two levels: Store-level and section-level.

- **Section-Level Content** --- Section-level content occurs when, in the **Sections > Content** pages, you create an association between a section content component and a media object. Again, the content that actually displays in the Customer UI is determined by the content files linked to the media object and any store/language mappings for the content files. If this level of association is not made, then Oracle iStore uses the store-level content.

The content components available in the **Sections > Content** page are those that apply to section display.

- **Store-Level Content** --- When you map a content component to a media object in the **Advanced > Content Component** screens, you are choosing a default media object at store level. Of course, the content that actually displays in the Customer UI is determined by the content files linked to the media object and any store/language mappings for the content files.

Store -level content is only presented if no product, category, or section associations exist.

8.3.2 Media Objects and Content Components Classes

Media objects and content components are categorized by **Class**, based on their content purpose. For lists of the classes, see:

- [Section 8.3.2.1, "Seeded Content Component Classes"](#)
- [Section 8.3.2.2, "Seeded Media Object Classes"](#)

Content components of any class can be associated to any class of media object, and vice versa. Oracle iStore does not perform any validation of the classes; however, as a best practice, it is recommended that you use matching classes together.

By default, when the **Search and Select: Media Objects** page is retrieved from the content component mapping screens, the media objects LOV contains media objects of the same class as the content component being mapped.

8.3.2.1 Seeded Content Component Classes

The class designation of content components can be updated **only** for non-seeded content components for which there are no existing media object assignments.

Seeded content components classes are:

- **Product** -- For content components which display product content
- **Section** -- For content components which display section content
- **Section and Product** -- For content components which display both product and section content

8.3.2.2 Seeded Media Object Classes

The class designation of media objects can be updated **only** for non-seeded media objects -- i.e., media objects that you create. For seeded media objects, the class is read-only.

Seeded media objects classes are:

- **Product** -- For media objects which display product content
- **Section** -- For media objects which display section content
- **Section and Product** -- For media objects which display both product and section content
- **Message** -- For media objects which are text messages

Note: Seeded message-class media objects can be called directly from some Display Templates, without having to first be mapped to a content component

- **Others** -- For all other classes of media objects, and for backward compatibility
- **Logo** -- For the display of logo-type elements of the web pages

8.3.2.3 Media Object Classes and iStore JSP Calls

All classes of the media objects can be called directly from the template by using the API, `DisplayManager.getMedia(<accessName>)`. This, however, requires customizing the JSPs.

As a best practice, to avoid having to customize the JSPs, use the seeded media objects with class of Product, Section, or Section and Product, with the seeded content components that match these categories.

The seeded media objects of class Others and Logo are called directly from the JSPs. Therefore, for these classes, you do not need to map them to content components in order for them to display.

The Media objects of class Message are called directly by using the API, `DisplayManager.getTextMediaOrFndMsg()`.

A list of seeded media objects can be found in [Section E.13, "Media Objects"](#).

See also:

- [Section 8.5.0.6, "Media Objects Guidelines and Behavior"](#)
- [Section 8.5.1.1, "Message-Class Media Objects Guidelines and Behavior"](#)

8.3.2.4 Class Name and Description Lookup

The class name for media objects and content components is defined as extensible lookup in Oracle Application Object Library (AOL). This means you can add additional lookup names and definitions, or change the existing ones, through the AOL Oracle Forms interface.

The name of the lookup is `IBE_M_MEDIA_OBJECT_APPLI_TO`.

For directions on how to modify seeded lookups, see [Section 14.4, "Modifying Oracle Application Object Library Lookups"](#).

8.4 Understanding Content Components

Oracle iStore's seeded Display Templates contain programmatic access names of specific content components. The content components are placeholders in the templates that expect a certain type of content. Content components define the types of media objects that can display on a web page. All but the Message, Other, and Logo classes of media objects must be linked to a content component in order to present content in the Customer UI. A template's category or type determines which of the seeded content components it may call.

You can set up content component-media object mappings using the following paths:

- **Catalog > Sections > Content** --- For steps, see [Section 7.4.5, "Adding Content to Sections"](#).
- **Catalog > Products > Content** --- For steps, see [Section 7.5.6, "Setting Content at the Product Level"](#).
- **Advanced > Content Components** --- For steps, see [Section D.5.2, "Assigning Media Objects to Content Components at the Store Level"](#).
- **Advanced > Categories > Assign Content** --- For steps, see [Section D.5.4, "Configuring Product Presentation at the Category Level"](#).

Each media object also must link to at least one content source file. See [Section 8.5, "Understanding Media Objects"](#), for more information.

8.4.1 Seeded Content Components

The following are the seeded content components:

- [Product Large Image](#)
- [Product Small Image](#)
- [Product Additional Information](#)
- [Section Small Image](#)
- [Section Additional Information](#)

8.4.1.1 Product Large Image

Use this content component to display a product large image. As a best practice, use with product-class media objects.

The programmatic access name is `STORE_PRODUCT_LARGE_IMAGE`.

8.4.1.2 Product Small Image

Use this content component to display a product small image. As a best practice, use with product-class media objects.

The programmatic access name is `STORE_PRODUCT_SMALL_IMAGE`.

8.4.1.3 Product Additional Information

Use this content component to display additional information for a product. As a best practice, use with product-class media objects.

The programmatic access name is `STORE_PRODUCT_ADDTL_INFO`.

8.4.1.4 Section Small Image

Use this content component to display a small image for a section. As a best practice, use with section-class media objects.

The programmatic access name is `STORE_SECTION_SMALL_IMAGE`.

8.4.1.5 Section Additional Information

Use this content component to display additional information at the section level. As a best practice, use with section-class media objects.

The programmatic access name is `STORE_SECTION_ADDTL_INFO`.

8.5 Understanding Media Objects

In Oracle iStore, media objects allow you to present content in the Customer UI beyond the name and description information provided through the section and product catalog functionality. For example, you can map an image file to a media object, and then link this image to a product.

Types of content allowed include image files, html files, "additional information", and text messages. You can configure the content to display at the product or section level. You also can set up content to display at the Inventory category level, or at the store level.

The multi-layer structure allows you to reuse a single media object in several different areas, by associating different content source files to different combinations of stores and languages.

8.5.0.6 Media Objects Guidelines and Behavior

Following is the behavior of media objects, and some guidelines:

- Each media object links to at least one content source file. This source file presents the content. For example, you link an image file such as a .gif to a media object, and the .gif provides the actual content, while the media object provides the display logic. In addition to this association, the template must be able to find the media object to display the content. Templates can find media

objects either directly or through content components, depending on the media object used.

- Most of the commonly used media objects (all but Message-class, Other-class, and Logo-class media objects) must be linked to a content component to be usable in the Customer UI.
- Media object associations can be made at the store, section, product, or Inventory category levels. See [Section 8.3, "Content Overview"](#), for more information.
- By default, a media object's content source file is linked to All stores and All languages. However, in the case of a multi-store and/or multi-language implementation, content items can be mapped to store and language combinations to present specific content for different stores and languages.
- Media objects can use as their source files the following file types:
 - *image files* -- examples include: .jpg, .gif, .bmp
 - *html files* -- examples include: .htm, .html
 - *text messages* --- see [Section 8.5.1, "Using Media Objects to Present Message Text"](#), for more information.
- Each seeded media object has a programmatic access name. For media objects called directly from the templates, the templates use this programmatic access name to call the media object and display its content. In the case of a media object linked to a content component, the template calls the content component's programmatic access name, not the media object's --- so in this case, a media object's programmatic access name is not used.

[Section 8.5.4, "Assigning Content Items to Media Objects"](#), contains steps to associate content items (files) to media objects.

The following figure shows the **Media Objects** page.

Figure 8–1 Media Objects Page

Media Objects

Search

Search

Results

Create Media Object

View

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Name	Programmatic Access Name	Keywords	Description	Type	Update	Delete
Accessories Section	Accessories_Section	Accessories Section	Accessories Section	Media		
Bin Close Image	STORE_BIN_CLOSE_IMAGE		Bin Close Image	Media		
Bin Open Image	STORE_BIN_OPEN_IMAGE		Bin Open Image	Media		
Calalogue Item Dropdown Image	STORE_CTLG_ITEM_DROP_DOWN_IMAGE		Calalogue Item Dropdown Image	Media		
Catalogue Section Link image	STORE_CTLG_SCT_LINK_IMAGE		Catalogue Section Link image	Media		
Comms 10pt Horizontal Spacer	COMMS_10PT_HORIZONTAL_SPACER			Media		
Comms 10pt Vertical Spacer	COMMS_10PT_VERTICAL_SPACER			Media		
Comms Cable Internet 1	COMMS_PRD_CABLE_INTERNET_1			Media		
Comms Cable Internet 2	COMMS_PRD_CABLE_INTERNET_2			Media		
Comms Cable Internet 3	COMMS_PRD_CABLE_INTERNET_3			Media		

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8.5.1 Using Media Objects to Present Message Text

Oracle iStore ships with hundreds of Customer UI text messages, and several of these text messages are presented in the Media Objects pages as a messages that you can map as content to individual stores.

Text messages for Oracle iStore are stored in the Oracle Application Object Library (AOL) schema. More information about these can be found in [Chapter 14, "Implementing Messages and Prompts"](#).

You map new content for the message-class media objects in the same way as other media objects, although the behavior is somewhat different. Use the steps in [Section 8.5.4, "Assigning Content Items to Media Objects"](#), to assign new content to the message-class media objects. See [Section 8.5.1.1, "Message-Class Media Objects Guidelines and Behavior"](#), below, for details about the behavior and guidelines.

The table below, Oracle AOL Text Messages Seeded as Media Objects of Message Class, shows the AOL messages that are also media objects.

Table 8–1 Oracle AOL Text Messages Seeded as Media Objects of Message Class

Media Object Name	Programmatic Access Name	Description	Default Text
Tax Message 1	IBE_PRMT_ORD_IS_IT_TAXABLE	Prompts the user whether the order is taxable or not.	Is this Order Taxable?
Payment book PO message	IBE_PRMT_PMTBK_PO_MSG	Payment book PO message.	If you have a purchase order, please enter Purchase Order Number:
New credit card message	IBE_PRMT_ORD_NEW_CREDIT_CARD	New credit card message.	New Credit Card
Payment book fax credit card message	IBE_PRMT_PMTBK_FAX_CC_MSG	Payment book fax credit card message.	Print and fax your completed Order Confirmation page to 123-456-7890
Order Confirmation Message 1	IBE_CHKOUT_ORD_CONFIRM_TEXT	Prompts the user to note order information.	Please print this page and keep it for your records. If you are faxing your credit card number or purchase order, remember to complete the Faxed Order section below before faxing.
Order Confirmation Message 2	IBE_CHKOUT_ORD_FAX_PO_MSG	Prompts the user on the Order Confirmation page for Purchase Order and fa.x	Please fill in the blanks and fax us this Order Confirmation page and Purchase Order.
Help message	IBE_PRMT_HELP_MESG_G	Message for online help.	This is the help area to be customized by merchant.
iStore System Saved Cart Name	IBE_PRMT_SC_DEFAULTNAMED	Default cart name for system-saved carts.	Store Saved
iStore Unnamed Cart Name	IBE_PRMT_SC_UNNAMED	Default name for unsaved carts	Store

8.5.1.1 Message-Class Media Objects Guidelines and Behavior

Following are guidelines and behavior for message-class media objects:

- If you associate a message-class media object with a source file and map it to All stores and All languages, you override the Oracle AOL text mapping for the message. To avoid this, you can associate the message-class media object with a

source file and map it to a specific store-language combination. In this case, the Oracle AOL text mapping will still remain at the All Stores-All Languages level.

- The tables that contain the message-class media object information and the AOL text messages are not synced. Therefore, if you update AOL messages in Forms, they will not appear as updated in the Store Administration UI Media Object pages, and vice versa.
- Message-class media objects do not need to be associated with content components in order for them to display in the Customer UI.
- Each message-class media object has a programmatic access name which the Display Template uses to display the message.

8.5.2 Seeded Media Objects

For a list of seeded media objects, see [Appendix E, "Display Templates and Media Objects"](#).

8.5.3 Creating New Media Objects

You may wish to create new media objects, if the seeded ones do not meet your business requirements. Use the steps below.

Directions on how to assign Section and Product content components to media objects can be found in [Section 7.4.5, "Adding Content to Sections"](#), and [Section 7.5.6, "Setting Content at the Product Level"](#).

Steps

1. Log in to the Store Administration UI and navigate to the **Create Media Object** page, using one of the following paths:
 - **Sections > Content > Create Media Object** icon
 - **Products > Content > Create Media Object** icon
 - **Content > Media Objects > Create Media Object** button
 - **Advanced > Content Components > Create Media Object** icon
 - **Advanced > Categories > Assign Content > Create Media Object** icon

The figure below shows the **Create Media Object** icon:

Figure 8–2 Create Media Object Icon

2. In the **Create Media Object** page, enter the following information:
 - **Media Object Name** --- Enter a descriptive name for the media object. This name will not appear in the Customer UI.
 - **Programmatic Access Name** --- Enter a value in the textbox, using the following guidelines:
 - If this will be a media object used with a content component, then the value entered here will be used for your own internal business purposes.
 - If this will be a media object used without a content component (e.g., called directly from a Display Template), then this name must be unique and entered into the Display Template call to the media object. See [Appendix D, "Advanced Display"](#), and the *Oracle iStore API Reference Guide* for details on how to customize the Display Templates.
 - **Keywords** --- Optionally, enter keywords if desired, separated by commas. After you enter them in the system, you can search by keywords using the media object search utility.
 - **Description** --- Optionally, enter a description for the media object. This description will not appear in the Customer UI, and is for your internal business purposes only.
 - **Class** --- Select a class for the media object, based on its display purpose. See [Section 8.3.2, "Media Objects and Content Components Classes"](#), for guidelines.
3. Press the **Apply** button to save changes.

The figure below shows the **Create Media Object** screen.

Figure 8–3 Create Media Object Page

Create Media Object

* Indicates required field

* Media Object Name

* Programmatic Access Name

Keywords

Description

* Class

Section and Product

Section and Product

Message

Product

Logo

Others

Section

8.5.4 Assigning Content Items to Media Objects

Each media object you use in your stores must link to the content item you are displaying. Additionally, you can create optional store/language mappings, linking different content items to different stores and their supported languages.

Use this procedure to assign a content item to a media object and map a store and language combination to the content item.

Steps

1. Log in to the Store Administration UI and select the **Content** tab. Select the **Media Objects** subtab. The **Media Object** page appears, showing all media objects in your implementation.
- Optionally, search for media objects by **Name**, **Programmatic Access Name**, **Keywords**, or **Description**. Enter partial text in the textbox, using the % sign as a wildcard if desired. Press **Enter** or **Go** to launch the search.

2. In the **Media Objects** page, select the **Update** icon for the media object to which you are mapping the content item. The **Update Media Object** page appears.

Optionally, in this page you can update the basic information about the media object, such as name, keywords, and description.

3. Select the **Add Content** button to launch the **Add Content** page.

You also can access the **Add Content** page from the **Catalog** tab (**Sections > Content > Show Details** hyperlink and **Products > Content > Show Details** hyperlink).

4. **Add the content source file:** In the **Add Content** page, select the flashlight icon next to the **Source File Name** textbox to launch the **Search and Select: Source Files** page.

5. In the **Search and Select: Source Files** page, find and select a content source file from the Content Repository. Select a source file by activating its radio button and pressing the **Select** button.

If you have not yet uploaded the source file to the Content Repository, then, in the **Add Content** page, press the **Upload** button next to the **Source File Name** textbox to upload the source file. Browse for and select the source file from the file system.

- See [Section 8.6, "Using the Content Repository"](#), for more information.

6. **Map to store:** In the **Add Content** page, in the **Source File Mapping** area at the bottom of the page, select from the **Store** LOV the store that this source file should be mapped to.

To map the content to all stores and all languages, select **All**.

7. Once you have selected a store, the **Language** LOV in the table will become available, showing all languages supported by the selected store. Use the **Language** LOV to select the appropriate language for the source file.
8. Press **Apply** to save changes. The media object is now mapped to the content file.
9. Optionally, select the **View Mapping** button to retrieve a list of store-language mappings for the media object.

8.6 Using the Content Repository

Oracle iStore's **Content Repository** is a tool that allows source files to be readily available to you for use as content for media objects. You must first upload files

from your local file system to the database before they become available in the repository.

The files are uploaded into the database (FND_LOBS table), not to the file system of the server.

Note: The functionality of the Content Repository is impacted by a profile option -- See [Section 8.6.2, "Understanding IBE: Use Database for Media Storage"](#), below, for details.

Topics in this section include:

- [Section 8.6.1, "Content Repository Overview"](#)
- [Section 8.6.2, "Understanding IBE: Use Database for Media Storage"](#)
- [Section 8.6.3, "Updating Source Files"](#)
- [Section 8.6.4, "Uploading Source Files"](#)

8.6.1 Content Repository Overview

The **Content Repository** page lists the source files in your content repository, and allows you to preview the files. It also allows access to other pages where you can upload and update source files.

In the **Content Repository** page you can:

- View all source files that have been uploaded to the content repository.
- Delete source files from the content repository.
- Search for source files within the content repository.
- Access the **Upload/Update Source File** pages, where you can upload source files for the repository.

The figure below shows the Content Repository main summary page.

Figure 8–4 Content Repository Page

Content Repository

Search

SearchSource File NameGo

Results

Upload Source File

Previous1-10 of 77Next 10

Source File Name	Keywords	Description	Preview	Update	Delete
/OA_MEDIA/EOS10007.gif					
/OA_MEDIA/EOS10010.jpg					
/OA_MEDIA/EOS10014.gif					
/OA_MEDIA/EOS10018.gif					
/OA_MEDIA/enst.gif					
/OA_MEDIA/flmn.gif					
/OA_MEDIA/kberg.gif					
/OA_MEDIA/opmo.gif					
/OA_MEDIA/snscs.gif					
025_22A.JPG					

Previous1-10 of 77Next 10

8.6.2 Understanding IBE: Use Database for Media Storage

The profile option, **IBE: Use Database for Media Storage**, should be set to **Yes** at the site level in order to enable certain functionality in the **Content** tab, as described below:

When set to **Yes**:

- 1. In the **Add/Update Source File** page, the flashlight icon (which is used to launch the LOV for content repository) is displayed.
- 2. In the **Add/Update Source File** page, the **Upload File** button is displayed.
- 3. The **Content Repository** tab is displayed, and you can use it to upload source files.

When set to **No**:

- 1. In the **Add/Update Source File** page, the flashlight icon (which is used to launch the LOV for content repository) is NOT displayed.
- 2. In the **Add/Update Source File** page, the **Upload File** button is NOT displayed.

3. The Content Repository tab is still displayed. But when user clicks the tab, a warning message, *You do not have access to this page. To access this page, set IBE: Use Database for Media Storage to Yes.* is displayed.

8.6.3 Updating Source Files

Use the following procedure to update a source file in the Content Repository.

Steps

1. Log in to the Store Administration UI and select the **Content** tab. Select the **Content Repository** subtab. The **Content Repository** page appears, showing all content items available in the content repository.

Optionally, search for content source files by **Source File Name** or **Keywords**. Enter partial text in the textbox, using the % sign as a wildcard if desired. Press **Enter** or **Go** to launch the search.
2. In the **Content Repository** page, select the **Update** icon for the content item you wish to update. The **Update Source File** page appears.

The figure below shows the Update Source File page.

Figure 8–5 Update Source File Page

Update Source File

Current File Name /OA_MEDIA/EOS10007.gif

New File Name

Browse...

Keywords

Description

☐ Secured

3. Browse the file system for the file to replace the current file, using the Browse button. Select the file using your operating system’s conventions for selecting a file.
4. Optionally, select the **Secured** checkbox to apply security to the attachment.

Using the Secured checkbox allows Oracle iStore to use security for attachments. Oracle iStore checks the SECURED_FLAG column in JTF_AMV_

ATTACHMENTS_B table, and for secured attachments, security measures are used through jtfdownload. Unsecured attachments are loaded through jtfupload.

5. Select **Apply** to save the changes. The previous file is now replaced in the Content Repository with the newly uploaded one.

8.6.4 Uploading Source Files

Use the following procedure to upload files to the Content Repository.

Steps

1. Log in to the Store Administration UI and select the **Content** tab. Select the **Content Repository** subtab. The **Content Repository** page appears, showing all content items available in the content repository.

Optionally, search for content source files by **Source File Name** or **Keywords**. Enter partial text in the textbox, using the % sign as a wildcard if desired. Press **Enter** or **Go** to launch the search.

2. In the **Content Repository** page, select the **Upload Source File** button. The **Upload Source File** page appears.

The figure below shows the **Upload Source File** page.

Figure 8–6 Upload Source File Page

Upload Source File

TIP Upload multiple source files: compress all source files, then upload the compressed (.zip) file.

* Indicates required field

* Source File Name **Browse...**

Keywords

Description

☐ Secured

3. Browse the file system for the file to replace the current file, using the Browse button. Select the file using your operating system's conventions for selecting a file.
4. Optionally, select the **Secured** checkbox to apply security to the attachment.

Using the Secured checkbox allows Oracle iStore to use security for attachments. Oracle iStore checks the SECURED_FLAG column in JTF_AMV_ATTACHMENTS_B table, and for secured attachments, security measures are used through jtfdownload. Unsecured attachments are loaded through jtfload.

5. Select **Upload File** to save the changes. The file is now uploaded to the Content Repository, and can be mapped to media objects.

Implementing Pricing

This chapter contains information on how to implement price lists for an Oracle iStore 11*i* implementation.

Main topics in this chapter include:

- [Oracle iStore Price List Overview](#)
- [Pricing Functionality Overview](#)
- [Creating a Basic Price List](#)
- [Creating an Additional Price List](#)
- [Supported Price List Modifiers](#)
- [Creating a Price List Discount Modifier](#)
- [Display Options for Units of Measure](#)
- [Pricing Attributes](#)
- [Pricing Qualifiers](#)
- [Pricing Agreements](#)
- [Oracle iStore Pricing Profile Options](#)

9.1 Oracle iStore Price List Overview

Every item for sale in a specialty store must appear in at least one price list. Basic price lists are created using Oracle Order Management Suite's Basic Pricing module. Price lists are assigned to specific stores using the Oracle iStore Store Administration UI.

Oracle Order Management calls the Oracle Pricing Engine to retrieve pricing information for price lists. A pricing request contains information for the Pricing Engine, including:

- Customer information
- Customer attributes
- Product information
- Attributes associated to the product
- Pricing date

9.2 Pricing Functionality Overview

Oracle iStore retrieves price list information from either Oracle Order Management's Basic Pricing module or Oracle Advanced Pricing, depending on the value of the profile option, **IBE: Use Price List Associated with Specialty Store**.

- If set to **Yes**, Oracle iStore retrieves the basic price list from Oracle Order Management Suite's Basic Pricing.
- If set to **No**, Oracle iStore passes a null price list, with party ID and account ID, to the Oracle Advanced Pricing Engine. In this case, the Advanced Pricing Engine determines the best price for which the user qualifies. Note that when using this method, prices are not cached in the catalog -- therefore performance will diminish.

The only exception to this rule is for walk-in/guest users. Regardless of the value set for **IBE: Use Price List Associated to Specialty Store**, for walk-in users, the default price list is always determined by the value set in the Store Administration UI.

An Oracle iStore license includes Basic Pricing. Oracle Advanced Pricing is a separately licensed product. Features and functions described in this chapter relate to Basic Pricing.

Using **Basic Pricing** a price list can contain:

- Pricing formulas
- Pricing agreements
- Basic discounts
- Freight and logistic charges

Using **Advanced Pricing**, a price list can contain:

- Volume breaks
- Item or item hierarchy structure
- Simple or complex formulas
- Dynamically calculated prices
- Percentage, fixed and/or lump sum discounts and/or surcharges
- Customized qualifiers
- Qualifier sourcing rules
- Deals and promotions

Consult the following guides for details:

- Basic Pricing - *Oracle Order Management Suite Implementation Manual, Vol.1*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

9.2.1 Types of Price Lists

To organize the dissemination of price list information in this guide, price lists are characterized as three types:

- **Basic Price List** --- A basic price list reflects the currency, responsibility, language, and details native to the baseline implementation. For example, the native implementation details for Vision Corporation are based on U.S. values. Therefore, the **basic price list** for Vision Corporation contains English as the default language and the U.S. dollar as the default currency. See [Section 9.3, "Creating a Basic Price List"](#), for more information.
- **Additional Price List** --- Additional price lists can be created in for stores in the same language and perhaps different currencies for the same organization. If Vision Corporation implements an additional store for their Milwaukee Operation, an **additional price list** needs to be created. This additional price list would model the basic price list and perhaps would only include different items. See [Section 9.4, "Creating an Additional Price List"](#), for more information.

- **Global Price Lists** --- This type would be created for foreign implementations. In a global implementation, you would create **global price lists**. For example, if Vision Corporation implements another price list for their German Operations with perhaps a different organization, different currency, and targeted at a different language, then this price list would be a **global price list**. See [Section 16.3.6, "Enable Global Currencies and Price Lists"](#), for more information.

9.3 Creating a Basic Price List

To create a basic price list, follow these steps:

- [Set up Basic Price List](#)
- [Add Products to Price List](#)
- [Verify Price List Profile Option](#)
- [Associate Price List to Store](#)

9.3.1 Set up Basic Price List

To set up a basic price list:

Prerequisites

- Basic store is implemented. See [Section 4.2.2, "Creating a Store"](#).
- Necessary currencies and languages are installed. See [Section 2.8.1, "Setting up Currencies"](#), and [Section 16.3.2, "Install Languages and Currencies"](#).
- Oracle iStore price list profile option values is determined. See [Section 9.3.3, "Verify Price List Profile Option"](#).

Responsibility

Order Management Super User or Oracle Pricing Manager

Login

Oracle Forms

Steps

1. Log in to Oracle Forms as Order Management Super User or Oracle Pricing Manager.
2. Navigate to: **Price Lists > Price List setup**.

3. In the **Price List** form enter the following:
 - **Price List Name:** Use a name that reflects the store implementation. For example, VISION_US_PL.
 - **Description:** Include a short description of the price list. For example, Euro price list for VISION_US implementation.
 - **Currency:** Choose a default currency. For example, choose DOL for the VISION_US_PL.
4. Navigate to the **List Lines** tab.
 - Add products to the price list. For specific steps, see [Section 9.3.2, "Add Products to Price List"](#)
5. Save your work.

9.3.2 Add Products to Price List

Products reside in Oracle Inventory and are added to price lists in Oracle Order Management. Specific Oracle Inventory flags and attributes must be set to web-enable products; properly setting these will enable product visibility in the iStore Customer and/or Administration UI. For a list of these flags and attributes, see [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#).

Adding products to a price list:

- Add products to price list using the **List Lines** tab.
- Enter **Items** in the **Product Context** field.
- Enter **Prices** in the **Value** field.

For more information on price lists, see *Oracle Order Management Suite Implementation Manual, Vol.1, Chapter 6: Price Lists*.

9.3.3 Verify Price List Profile Option

After creating a basic price list, set the profile option **IBE: Use Price List Associated to Specialty Store**. To enable retrieval of basic price lists, set this profile to **Yes** at the iStore application level.

Prerequisites

- Basic price list is set up.
- Price list contains products .

Responsibility

iStore Administrator

Navigation

Oracle Forms

Steps

1. Log in to Oracle Forms with **System Administrator** Responsibility.
2. Navigate to **Profile > System**. The **Find System Profile Values** window opens.
3. From the **Application** LOV, select iStore. This enables the profile at the iStore application level.
4. In the **Profile** field, enter the profile name, **IBE: Use Price List Associated to Specialty Store**.
5. Click **Find**. The **System Profile Values** form opens, displaying the results of your search.
6. Set to **Yes** at application level.
7. Save your work.

9.3.4 Associate Price List to Store

Associate the price list to a store using the Store Administration UI's **Pricing** page.

Prerequisites

- At least one basic price list is set up.
- Profile option value is determined.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI.

2. Navigate to: **Stores** (select store) > **Update** > **Pricing**.
3. Click the **flashlight icon** to launch the **Search and Select: Price Lists** navigator. The results table displays all available price lists.

Choose a default price list for the three user segments:
 - **Walk-in Customers:** Also known as guest users.
 - **Individual Customers:** Also known as B2C customers.
 - **Business Customers:** Also known as B2B customers.
4. Select **Update** to save changes.

9.4 Creating an Additional Price List

Additional price lists, outside of those native to the implementation, can be in the same language and currency, or of a different language and currency. Oracle iStore supports all currencies supported by the Oracle E-Business Suite, including the Euro. By integrating with Oracle Applications Release 11i, the Oracle iStore Customer UI displays appropriate currency symbols for all currencies.

Price lists can be created for all currencies in which you perform transactions. The Oracle iStore Customer UI displays price lists linked to the customer's preferred currency.

If the additional price list contains a different language and currency, see the Prerequisite list below.

Prerequisites

- Additional currencies are enabled and their appropriate currency symbols are set up. See [Section 2.8.1, "Setting up Currencies"](#).

Responsibility

Order Management Super User or Oracle Pricing Manager

Login

Oracle Forms

Steps

1. Log in to Oracle Forms as Order Management Super User or Oracle Pricing Manager.

2. Navigate to: **Price Lists > Price List setup**.
3. In the **Price List** form, enter the following:
 - **Price List Name:** Use a name that reflects the implementation that the additional price list will be associated to. For example, VISION_EURO_PL.
 - **Description:** Include a short description of the additional price list. For example, Euro price list for VISION_EURO store.
 - **Currency:** Choose the default currency. For example, choose EUR for the VISION_EURO_PL.
4. Navigate to the **List Lines** tab
 - Add products to the price list. For specific steps see [Section 9.3.2, "Add Products to Price List"](#).
5. Save your work.
6. Associate the price list to a store using the Store Administration UI. See [Section 4.2.2, "Creating a Store"](#).
7. Ensure the setting of the Oracle iStore price list profile option. See [Section 9.3.3, "Verify Price List Profile Option"](#).

9.5 Supported Price List Modifiers

Oracle iStore supports the price list modifiers listed in the following table, Oracle iStore Supported Pricing Modifiers.

Table 9–1 Oracle iStore Supported Pricing Modifiers

Modifier Name	Description/Example
Discount	Receive a 10% discount on item A
Surcharge	10% surcharge is applied for purchase of 100 units of item A
Freight and Special Charges	\$200 freight charge is applied to entire order
Point Break	Purchase 150 units for \$75 each
Range Break	1-100 unit cost is \$100, 100-200 unit cost is \$75

Note: IBE and JTT middle-tier caches do not support responsibility-based pricing modifiers. To use responsibility-based pricing modifiers, disable the IBE or JTT

caches. If the cache is disabled, responsibility-based modifiers can be set up using the pricing formula functionality in Oracle Advanced Pricing.

9.6 Creating a Price List Discount Modifier

To create a price list that contains a discount, use the **Discount List Modifier**. This enables you to display a different price for **List Price** and **Your Price**. The value for List Price is from the basic price list, while the value for Your Price is the basic price list plus the associated discount list modifier.

This functionality also can be used to set up promotion codes. Oracle iStore-specific information can be found in [Section 11.1.11, "Using Promotion Codes in Shopping Carts"](#). See the *Oracle Order Management Suite Implementation Manual* for complete details.

The following figure shows an example of an implementation of Oracle iStore using the List Price/Your Price functionality.

Figure 9–1 Price List Discount



Order Management Suite's Basic Pricing module includes discount list modifier functionality. Although the discount is created using basic pricing, it must contain specific attributes to function properly in Oracle iStore.

To create a price list discount, follow these steps:

- [Create Price List](#)
- [Create Discount Modifier](#)

- [Run Concurrent Program](#)
- [Associate Discount Price List to Store](#)

9.6.1 Create Price List

Price list for discounts must contain:

- Product Attribute value - **ALL_ITEMS**
- Default Currency reflecting currency of store implemented

For specific steps to create a price list, see [Section 9.3.1, "Set up Basic Price List"](#).

9.6.2 Create Discount Modifier

To set up a price list displaying different values for **List Price** and **Your Price**:

Prerequisites

- Price list has been created.
- Price list includes products.

Responsibility

Oracle Pricing Manager

Login

Oracle Forms

Steps

1. Log in to Forms with **Oracle Pricing Manager** responsibility.
2. Choose **Modifiers > Modifier Setup**. The Define Modifier Form opens.
3. In the **Main** tab, enter the following fields:
 - In the **Type** field, enter `Discount List`.
 - In the **Name** field, enter a user-friendly name.
 - In the **Currency** field, choose a default currency for the modifier.
 - Check **Active** and **Automatic**.

Figure 9–2 Price List Discount Modifier

Define Modifier

Main | **Advanced**

Type: **Discount List** Number: **10** ☒ Active
 Name: **Discount_Modifier** Version: ☒ Automatic
 Currency: **USD** Start Date: -
 Description: []

Modifiers Summary | Discounts/Charges | Promotion Upgrades | Promotion Terms | Coupons | Price Breaks*

Modifier No	Level	Modifier Type	Start Date	End Date	Print On Invoice
18716	Line	Discount	01-OCT-2002		☒
18717	Line	Discount	02-OCT-2002		☒
18349	Line	Discount	24-SEP-2002	24-OCT-2002	☒
					☐
					☐

4. In the **Modifiers Summary** tab, enter the following values:
 - In the **Level** field, choose **Line**.
 - In the **Modifier Type** field, choose **Discount**.
 - In the **Start Date** field, pick the start date that applies.
 - Check **Automatic**.
 - In the **Pricing Phase** field, choose **List Line Adjustment**.
 - In the **Product Attribute** field, choose **ALL_ITEMS**. For a complete list of Product Attributes supported see [Section 9.8, "Pricing Attributes"](#).
 - In the **Volume** type field, choose **Item Amount**.

- In the **Break Type** field, choose **Point**.
 - In the **Operator** field, choose **Between**.
 - In the **UOM** field, choose **Ea**.
5. In the **Discounts/Charges** tab, enter the following values:
- In the **Formula** field, choose **Handling**.
 - In the **Application Method** field, choose **Percent**.
 - In the **Value** field, enter your discount percentage amount.
For example, enter 10.
6. Click **Save**.

9.6.3 Run Concurrent Program

After creating the pricing modifier run the pricing batch job, **Build Sourcing Rules** concurrent program. This will generate and display the correct prices. Bounce the Apache server after the concurrent program completes.

For specific procedures, see the *Oracle Advanced Pricing User's Guide*.

9.6.4 Associate Discount Price List to Store

After running the Build Sourcing Rules concurrent program, the price list is available in the Store Administration UI. To associate the discounted price list to a store see [Section 4.2.2.4, "Create a Store: Assigning Price Lists"](#).

9.7 Display Options for Units of Measure

For Oracle iStore products, you can determine whether all or only primary Units of Measure (UOM) are displayed in the Customer UI. To determine UOM display, set **IBE: Retrieve All Units of Measure for an Item**:

- If set to **Yes** at iStore application level, for each product, all UOMs and all prices will be displayed.
- If set to **No** at iStore Application level (default is No), for each product, only the primary UOM and prices are displayed.

If setting **IBE: Retrieve All Units of Measure for an Item**, set the profile option **IBE: Retrieve Price When Displaying Item**, to an opposite value.

Example 9–1 Setting Unit of Measure Display Profiles

Scenario 1: Customer UI displays all UOMs with all prices.

- IBE: Retrieve All Units of Measure for an Item is set to **Yes**.
- IBE: Retrieve Price When Displaying Items is set to **No**.

Scenario 2: Customer UI displays prices for an item's primary UOM.

- IBE: Retrieve All Units of Measure for an Item is set to **No**.
- IBE: Retrieve Price When Displaying Items is set to **Yes**.

9.8 Pricing Attributes

Pricing attributes are used to determine what is priced by Oracle Pricing. For example, if you use the pricing attribute `Item Category`, your promotions and discounts apply to an entire category of products rather than to a single product number.

The following table, Pricing Attributes Supported by Oracle iStore, lists the pricing attributes that Oracle iStore supports, along with their contexts and pricing levels.

Table 9–2 Pricing Attributes Supported by Oracle iStore

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

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

9.9 Pricing Qualifiers

Pricing qualifier attributes are used to calculate product prices based on certain attributes of the customer. 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, *Qualifier Attributes Supported by Oracle iStore*, lists the qualifier attributes that Oracle iStore supports, along with their contexts and pricing levels.

Table 9–3 Qualifier Attributes Supported by 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
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

Attribute Name	Context	Pricing Level
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

For information on how to set up Pricing Qualifiers, see the *Oracle Advanced Pricing User Guide*.

9.10 Pricing Agreements

Pricing agreements enable billing specifications that allow a quote (cart) to be priced. Pricing agreements are created in Oracle Order Management Suite's Basic Pricing module.

Universal and customer-specific pricing agreements can be created. However, Oracle iStore does not display Universal agreements in the Customer UI user pick-list. A Universal agreement can only be used if previously added to a quote through an integration with Oracle Quoting.

Attributes of a pricing agreement:

- Price list
- Purchase order number
- Bill-to address
- Bill-to contact
- Invoicing terms
- Payment terms
- Shipment terms

Attributes listed above set up and apply default pricing rules in Oracle Order Management. Each pricing agreement can only have one price list assigned to it. However, one list can be linked to multiple agreements.

Oracle iStore offers two different types of agreement functionalities:

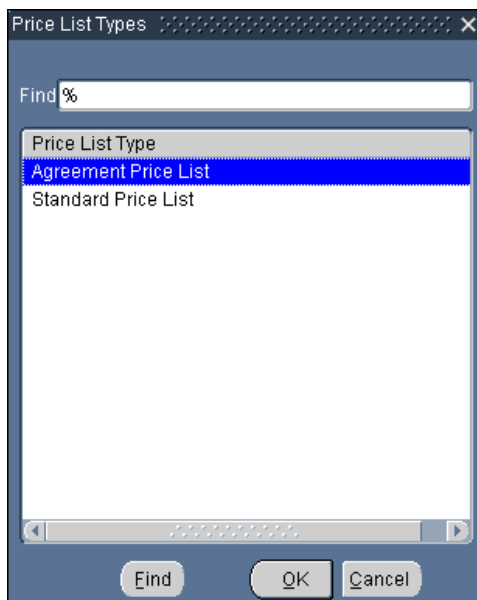
- **Standard Agreements** --- Standard Agreements use standard price lists. Price list lines are set up and maintained through the regular Price List Setup form. Use Standard Agreements to define special terms and conditions that are defaulted onto the order, but use prices that are available to other orders. Standard Agreements can be generic or can be specific to a customer or customer family.
- **Pricing Agreements** --- Pricing Agreements use Agreement Price Lists. These price lists are set up and maintained through the Agreements form. Use Pricing Agreements to setup special pricing arrangements with either a customer or a group of customers. You are also able to define special terms and conditions that are defaulted onto the order.

Each type of agreement serves different business needs. You will need to determine how you will use each type of agreement and thus establish controls around the naming, numbering and using of each. Any iStore Customer UI user who has the IBE_USE_PRICING_AGREEMENT permission can use either type of agreement (B2B).

For more information see *Oracle Order Management Suite Implementation Manual Volume 1 and Volume 2*.

The Oracle Forms figure below shows the two types of pricing agreements supported by Oracle iStore.

Figure 9–3 Oracle iStore Supported Pricing Agreement Types



For information on how agreements display in the shopping carts, see [Section 11.1.10, "Using Pricing Agreements in Shopping Carts"](#).

9.10.1 Creating Item-Level Agreements

B2B customers can select pricing agreements for a shopping cart at item level.

To enable item-level agreements for B2B users, set the profile option, **IBE: Use Line Agreements**, to **Yes** at iStore application level.

If a user is assigned the permission, **IBE_USE_PRICING_AGREEMENT**, and the profile option, **IBE: Use Line Agreements**, is set to **Yes**, the user can set cart and item-level agreements.

If a pricing agreement is assigned at the item level, the price will be retrieved by the corresponding price list. Otherwise, Oracle iStore will use the price list associated to the pricing agreement assigned at the cart level.

9.10.2 Using Line Level Commitments

In a B2B scenario, users can use commitments to complete the billing process by setting the profile option, **IBE: Use Commitments**, to **Yes**.

Commitments can be associated with an agreement. Thus, the agreement and corresponding price list can get pulled for the line, even if users do not have permission and the agreement profile is turned off. If those are off, then users will not be able to set agreements on the commitment page, but the agreements tied to commitments will still be pulled in, and so will the corresponding price list.

9.11 Oracle iStore Pricing Profile Options

For Oracle iStore to function properly, **IBE: Pricing Event for Shopping Cart**, must be set. This profile determines the pricing event for processing the shopping cart price in Oracle Pricing. Set to **Batch Processing** to ensure that the price lists, modifiers, discounts, promotion codes, and surcharges are applied correctly at header and line level.

Implementing Payment Types and Shipping Methods

This chapter contains information on how to implement payment types and shipping methods in Oracle iStore 11i.

Main topics in this chapter include:

- [Oracle iStore Payment Types Overview](#)
- [Oracle iStore Seeded Payment Types](#)
- [Oracle iStore Payment Types Functionality](#)
- [Setting up Basic Payment Types](#)
- [Setting up Purchase Orders](#)
- [Setting up Enhanced Payment Types](#)
- [Setting up a Threshold for Payment Types](#)
- [Setting up Item-Level Billing](#)
- [Setting up Payment Commitments](#)
- [Setting up Shipping Functionality](#)

10.1 Oracle iStore Payment Types Overview

Oracle iStore allows you to configure several payment types for your stores. Each store can use different payment types, depending on your business requirements. Oracle Order Management, Oracle Receivables, and the Oracle iStore Store Administration UI work together to enable **basic payment types** including:

- Cash

- Check
- Purchase Order
- Fax Credit Card
- Invoice

If your store needs to accept credit cards as a payment type, Oracle iStore can be configured to handle credit card payment processing and authorization. Oracle Order Management, Oracle iPayment, Oracle Receivables, and the Oracle iStore Store Administration UI work together to enable these **enhanced payment types**, including:

- Credit Card
- Credit Card Authorization

Note: An Oracle iStore license includes the ability to implement both basic and enhanced payment types.

For more information on setting up basic payment types see [Section 10.4, "Setting up Basic Payment Types"](#).

For more information on setting up enhanced payment types see [Section 10.6, "Setting up Enhanced Payment Types"](#).

10.2 Oracle iStore Seeded Payment Types

The seeded values for **basic payment types** are retrieved from the FND_LOOKUP_VALUES table for **IBE_PAYMENT_TYPE**.

The seeded values are:

- CASH - Cash
- CHECK - Check
- CREDIT_CARD - Credit Card
- FAX_CC - Fax Credit Card
- INVOICE - Invoice
- PO - Purchase Order

The seeded values for **enhanced payment types** are pulled in from the FND_LOOKUP_VALUES table for **CREDIT_CARD**.

The seeded values are:

- AMEX - American Express
- DINERS - Diner's Club
- DISCOVER - Discover
- MC - Master Card
- OTHERS - Others
- VISA - Visa

To implement cash, check, faxed credit card, or invoice, see [Section 10.4, "Setting up Basic Payment Types"](#).

To implement purchase orders see [Section 10.5, "Setting up Purchase Orders"](#).

To implement credit cards see [Section 10.6, "Setting up Enhanced Payment Types"](#).

10.3 Oracle iStore Payment Types Functionality

Basic payment types are enabled through Oracle Order Management and are processed as follows:

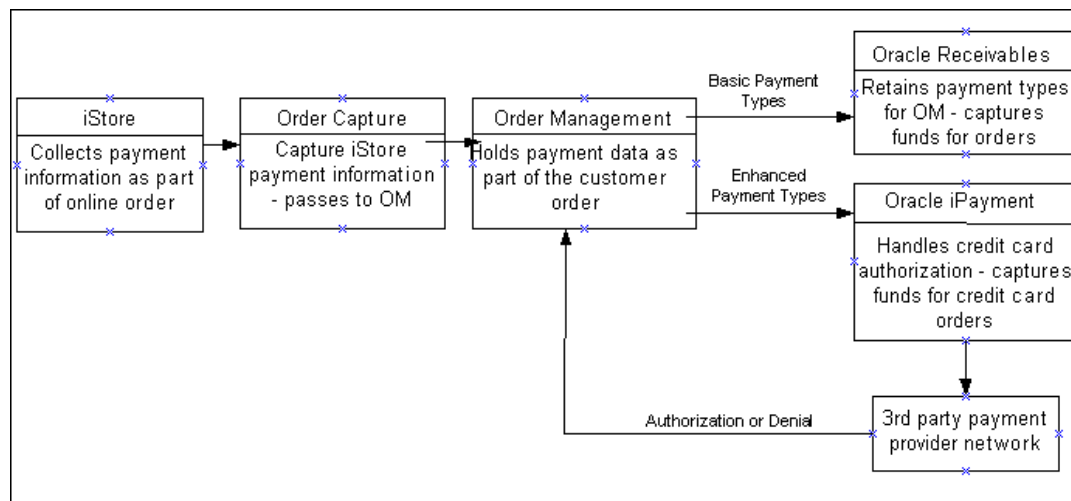
1. Customer chooses a basic payment type as payment method.
2. Checkout process is finalized and the order is placed through Oracle iStore.
3. Order information is passed to Oracle Order Management via Oracle Order Capture.
4. Oracle Order Management picks, ships, and delivers the order.
5. After shipment, Oracle Receivables handles payment remittance for applicable payment types.

Enhanced payment types are also enabled through Oracle Order Management, and are processed as follows:

1. Customer chooses an enhanced payment type as payment method.
2. Checkout process is finalized, and the order is placed through Oracle iStore.
3. Oracle Order Capture passes order information to Oracle Order Management.

4. Oracle Order Management interfaces with Oracle iPayment for credit card processing.
5. Oracle iPayment integrates with third-party payment providers to authorize the credit card, and passes transaction results back to Oracle Order Management.
6. If approved, Oracle Order Management picks, ships, and delivers the order.
7. After shipment, Oracle Receivables processes payment remittance.

Figure 10–1 Payment Processing Functionality



10.4 Setting up Basic Payment Types

To set up basic payment types in Oracle iStore:

1. Verify Receipt Classes -- See [Section 10.4.1, "Verify Receipt Classes"](#).
2. Set Payment Processing Profile Options -- See [Section 10.6.1, "Set Credit Card Authorization Profile Options"](#).
3. Enable Basic Payment Types -- See [Section 10.4.3, "Enable Basic Payment Types"](#).

10.4.1 Verify Receipt Classes

Receipt classes are used to determine required processing steps for receipts in which payment methods are assigned. In Oracle Receivables, a receipt class must be created for all payment types used in Oracle iStore. Use the following guidelines when creating payment types (basic or enhanced) for Oracle iStore.

- Receipt classes must be defined.
- Banks must be defined.
- Enter payment types in the **Payment Type** field.
- For enhanced payment types, choose **Credit Card**.

For setup steps, see the *Oracle Receivables User Guide*, Chapter 2: Setting Up.

10.4.2 Set Payment Processing Profile Option

Basic payment types are processed in Oracle Order Management. Thus, you will set your application to authorize payments online.

Note: Offline payment processing is used when obtaining third-party credit card authorizations.

To set offline payment processing profile options:

Prerequisites

- Business requirements for payment processing have been determined.
- Business requirements for payment types have been determined.
- Oracle iPayment has been properly implemented. See *Oracle iPayment Implementation Guide*.

Responsibility

System Administrator

Login

Oracle Forms

Steps

1. Log in to Oracle Forms with **System Administrator** responsibility.
2. Choose **Profile > System**. The Find System Profile Values form appears.

3. In the **Application** field, enter `iStore`, or use the LOV to search for and select `iStore`.
4. In the Profile field, enter `ibe%auth%` and click **Find**.
5. In the System Profile Values form, set the following profile option to **Yes** at the `iStore` application level:
 - **IBE: Authorize Payment Offline During Normal Checkout**
6. Save your work.

10.4.3 Enable Basic Payment Types

After verifying the receipt class in Oracle Receivables, enable the payment type in the Store Administration UI:

Prerequisites

- Receipt class is verified. See [Section 10.4.1, "Verify Receipt Classes"](#).
- Business requirements for payment types have been decided.

Responsibility

iStore Administrator

Navigation

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI. Select the store for which you are enabling the payment types.
2. The **Update Store: Details** page appears.
3. In the left area of the screen, select the **Payment** hyperlink. The **Payment Types** page appears, showing all payment types supported by this store.
4. To add payment types, select the **Add Payment Type** button. The **Select: Payment Types** page appears.
5. In the **Select: Payment Types** page, select the payment types you wish this store to support.

Press the **Select** button to add the payment type to the store.

6. When you have returned to the **Payment Types** page, select the **Apply** button to save changes.

The following figure shows the **Select: Payment Types** screen in the Store Administration UI.

Figure 10-2 *Selecting Enhanced Payment Types*

Select: Payment Types

Select

Cancel

Select All

Select None

Previous

1-9 of 9

Next

Select	Payment Code	Payment Type
☒	AMEX	Credit Card-American Express
☐	AmEx	Credit Card-American Express(Upgraded)
☐	DINERS	Credit Card-Diner's Club
☐	Diner's	Credit Card-Diner's Club(Upgraded)
☒	DISCOVER	Credit Card-Discover
☐	Discover	Credit Card-Discover(Upgraded)
☒	MC	Credit Card-Master Card
☐	OTHERS	Credit Card-Others
☒	VISA	Credit Card-Visa

Previous

1-9 of 9

Next

If enabling Purchase Order as a basic payment type, additional steps need to be performed. See [Section 10.5, "Setting up Purchase Orders"](#).

10.5 Setting up Purchase Orders

Oracle iStore allows you to set up purchase orders as a basic payment type. When purchase order is enabled, upon checkout, the **Purchase Order** textbox is displayed in the Customer UI's **Payment and Billing Information** page. Using this textbox, customers can enter a purchase order number to be assigned to their purchase.

Note: Purchase orders are not supported with item-level billing. For more information about setting up item-level billing see [Section 10.8, "Setting up Item-Level Billing"](#).

To set up purchase orders:

- Verify Receipt Classes -- See [Section 10.4.1, "Verify Receipt Classes"](#)
- Enable the Purchase Order Textbox -- See [Section 10.5.1, "Enable Purchase Order Textbox"](#)

10.5.1 Enable Purchase Order Textbox

To enable the Purchase Order textbox:

Prerequisites

- Purchase order receipt class is enabled in Oracle Receivables. See *Oracle Receivables User Guide*.
- Cash and invoice are enabled as payment types.

Responsibility

iStore Administrator

Login

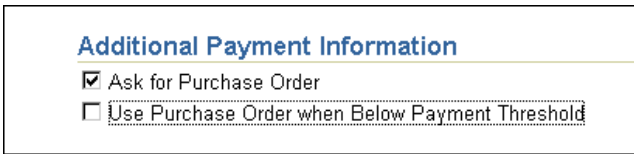
Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and select the store you are enabling purchase orders for. Click **Update**.
2. Select the **Payment** hyperlink.
3. Select **Ask for Purchase Order**. Indicate by placing a check in the checkbox.
4. Click **Apply**.

The following figure shows the checkbox for enabling the Purchase Order textbox in the **Payment** page in the Store Administration UI.

Figure 10-3 Ask for Purchase Order Checkbox



Additional Payment Information	
☒	Ask for Purchase Order
☐	Use Purchase Order when Below Payment Threshold

5. Verify that the **Purchase Order Textbox** appears in the Customer UI:

- a. Launch the Customer UI; log in using the appropriate responsibility.
- b. Add an item to the shopping cart.
- c. Proceed to checkout.
- d. Navigate to the **Payment and Billing Information** page. Verify that the textbox, **Purchase Order No:** appears.

The following figure shows how the Purchase Order textbox should appear.

Figure 10–4 Purchase Order Number Textbox



Purchase Order Information:
 If you have a purchase order, please enter it here:
 Purchase Order No:

10.6 Setting up Enhanced Payment Types

Many web stores are retail gateways for products. These web stores are often open to B2C and walk-in customers who may not have the ability to purchase products using invoices or purchase orders. As a result, many Oracle iStore deployments have business requirements mandating additional payment types, such as credit cards or debit cards.

Enabling credit cards as an acceptable payment type can ease the process of buying products, thus improving the overall efficiency of an Oracle iStore deployment. For a list of seeded values for credit cards, see [Section 10.2, "Oracle iStore Seeded Payment Types"](#).

Oracle iPayment obtains authorization for the credit card. It authorizes the amount by integrating with third-party payment providers, such as Cybercash. For additional information on setting up Oracle iPayment with third-party payment provider networks, see the *Oracle iPayment Implementation Guide*.

To set up enhanced payment types/credit cards:

- Verify Receipt Classes -- See [Section 10.4.1, "Verify Receipt Classes"](#).
- Set Payment Processing Profile Options -- See [Section 10.6.1, "Set Credit Card Authorization Profile Options"](#).
- Verify Merchant ID and Payee ID -- See [Section 10.6.2, "Verify Merchant ID and Payee ID"](#).

- Enabled Enhanced Payment Type --- See [Section 10.6.3, "Enable Enhanced Payment Type"](#).

10.6.1 Set Credit Card Authorization Profile Options

There are two places where online credit card payment authorization can happen: the iStore API call and the Order Capture API call. The iStore API call is no longer supported, and so the IBE profile that controls credit card payment authorization should be set to Yes at all levels (to turn it off), whether or not you want to use online authorizations. It is the Order Capture (ASO) profile option for credit card authorization that should be used to turn online authorization on or off. How to set these profile options is discussed below.

Use the following procedure to set credit card authorization profile options.

Prerequisites

- Payment processing business requirements have been determined.
- Business requirements for payment types have been determined.
- Oracle iPayment has been properly implemented. See the *Oracle iPayment Implementation Guide*.

Responsibility

System Administrator

Login

Oracle Forms

Steps

1. Log in to Oracle Forms with **System Administrator** responsibility.
2. Choose **Profile > System**. The Find System Profile Values form appears.
3. In the **Application** field, enter `iStore`, or use the LOV to search for and select `iStore`.
4. In the Profile field, enter `ibe%auth%` and click **Find**.
5. In the System Profile Values form, set the following profile option at the iStore application level:
 - **IBE: Authorize Payment Offline During Normal Checkout = Yes**

6. Return to the Find System Profile Values form.
7. In the **Application** field, enter `iStore`, or use the LOV to search for and select `iStore`.
8. In the Profile field, enter `aso%auth%` and click **Find**.
9. In the System Profile Values form, set the following profile option at the iStore application level:
 - **ASO: Credit Card Authorization = Yes**

This enables online credit card payment authorization. If you want to disable credit card authorization online, set this profile option to No.
10. Save your work.

10.6.2 Verify Merchant ID and Payee ID

For credit cards to be a valid payment type, the Merchant ID must hold the same value as the Payee ID. The Payee ID value is held in Oracle iPayment and the Merchant ID value is held in Oracle Receivables. The Payee ID identifies a business through the Oracle iPayment server by payment systems, credit card vendors and banks.

To verify the two values, refer to the *Oracle iPayment Implementation Guide* and the *Oracle Receivables User Guide*.

Prerequisites

- Merchant ID has been assigned to your business.
- Oracle iPayment integration is mandated by your business requirements.
- Oracle iPayment is implemented.

Responsibility

Order Management Super User

Login

Oracle Forms and Oracle iPayment Administration page

Steps

1. Log into Oracle Forms with Order Management Super User responsibility.

2. Navigate to **Receivables > Setup > Receipts > Receipt Classes**. The Receipt Classes form appears.
3. Query the receipt method with Name = **Credit Card**.
4. Note the value of the **Merchant Ref** field. The Merchant ID provided for a receipt class should be the same as the Payee ID defined in the iPayment Administration page.
5. Navigate to the Oracle iPayment Administration page.
6. Query the **Payee** field. The Payee Identifier should have the same value as the Merchant ID noted in the previous step.
7. In the event that a Payee Identifier has not been created, create one using the same number as the Merchant ID.

To create a payee:

- a. Navigate to the iPayment UI Administration page.
- b. In the Payee tab, click **Create**.
- c. Fill in the form. Make the Payee Identifier number the same value as the Merchant ID.
- d. Check the **Credit Card** checkbox.
- e. Click **Create** to save the record.

Oracle iStore uses customers' account ID numbers to store and track their credit card numbers in the AP_BANK_ACCOUT_USES_ALL table per the Oracle TCA model.

10.6.3 Enable Enhanced Payment Type

To associate the enhanced payment type to a particular store, follow this procedure:

Follow the steps in [Section 10.4.3, "Enable Basic Payment Types"](#), to add the payment types to the appropriate stores.

10.7 Setting up a Threshold for Payment Types

Mandating the use of credit cards for purchases less than a designated amount can provide a significant benefit to certain web stores. For many corporations, transactions below a certain threshold amount are written off as bad debt. Tracking and collecting payments for a small currency amount often isn't worth the

collection effort. Therefore, many businesses are moving toward mandating specific payment types for purchases that fall under a certain payment amount.

To accommodate this business requirement, Oracle iStore has the Payment Threshold feature that enables the merchant to limit payment methods when customers make low dollar amount transactions.

This feature has the following functionality:

- In a multiple-store deployment, some stores can have the Payment Threshold feature enabled, while other stores do not.
- Payment Threshold can be enabled for each installed currency.
- For purchases below the payment threshold, customers will only see appropriate payment types for which their order qualifies.
- You can exclude a customer, or group of customers, from the threshold restriction, by assigning a user the permission, **IBE_IGNORE_THRESHOLD**. For more information on user permissions in Oracle iStore, see [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).

From a technical standpoint, payment method threshold affects three tables in the database:

Table 10–1 Payment Method Threshold - Database Tables

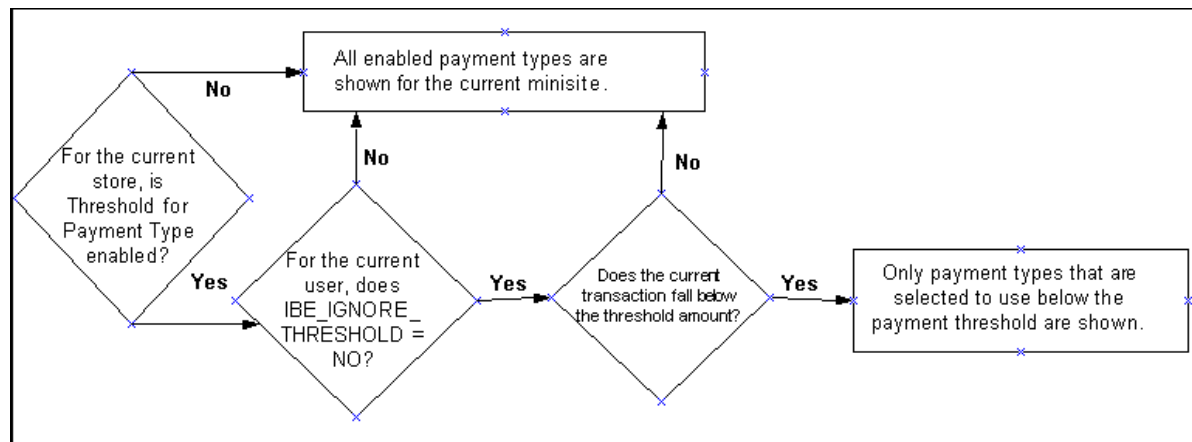
Table Name	Field Name Affecting Threshold	Comments
IBE_MSITES_B	PAYMENT_THRESHOLD_ENABLE_FLAG	Indicates if the payment threshold is enabled or not. "Y" is if it is enabled.
IBE_MSITE_CURRENCIES	PAYMENT_THRESHOLD	Holds the payment threshold value for the currency.
IBE_MSITE_INFORMATION	MSITE_INFORMATION2	Used to save the flag which indicates if this payment type can be used below the payment threshold. "Y" indicates that it can be used below the threshold.

For technical details regarding the Java APIs , see the *Oracle iStore API Reference Guide*.

From a functional perspective, the Oracle iStore payment detail page displays the appropriate payment types assigned to the payment method threshold. For

example, if it is designated that all orders under \$2000 must be paid with a credit card, when the customer proceeds to checkout, **credit card** is the only payment method available to them.

Figure 10–5 Payment Method Threshold Functional View



10.7.1 Enable Payment Threshold

To enable a Payment Threshold, follow these steps:

- Express Checkout Evaluation --- See [Section 10.7.2, "Evaluate Express Checkout Implementation"](#).
- Enable Threshold for Payment Type --- See [Section 10.7.3, "Enable Threshold for Payment Type Flag"](#).
- Validation and Testing --- See [Section 10.7.5, "Validate and Test"](#).

10.7.2 Evaluate Express Checkout Implementation

The implementation of the Express Checkout feature could affect the implementation of the Oracle iStore Payment Threshold feature. When Express Checkout has been enabled, the only payment type available to a customer using Express Checkout is Credit Card. Because of this, in the following scenarios, if you are attempting to use Payment Threshold, you should disable Express Checkout:

- If your users are **not** assigned the permission, **IBE_IGNORE_THRESHOLD**.

- If the store's business rules mandate that credit cards are **not** a valid payment type for purchases below the threshold amount.

If you decide not to accept credit cards below the payment threshold, you must set the following profile:

- **IBE: Use Express Checkout = No.**

See [Section 11.3.8, "Express Checkout"](#), for more information on Express Checkout.

10.7.3 Enable Threshold for Payment Type Flag

You will use the Store Administration UI to enable Payment Thresholds per store. Use the following procedure:

Prerequisites

- If the store is not accepting credit cards for amounts below the payment threshold, **Express Checkout** must be turned **off**.
- Business requirements and threshold amounts have been determined.

Responsibility

IBE_ADMINISTRATOR

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and select the store you are enabling the Payment Threshold for.
2. Select **Update**. The **Update Store: Details** page opens.
3. Place a checkmark in the **Enable Threshold for Payment Types** checkbox.
4. Click **Apply**.

10.7.4 Enable Payment Types and Threshold Limits

After enabling the threshold flag, assign Payment Threshold payment types and amounts. To establish these values:

Prerequisites

- Business requirements have been determined.
- The Payment Threshold flag is enabled.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and select the store you are enabling payment method threshold limits for.
2. Click **Update**. The **Update Store: Details** page opens.
3. Select the **Pricing** hyperlink.
4. In the **Payment Threshold** column, indicate the threshold amount for the currency and price lists selected. Enter the amount in whole numbers.
5. Click the **Apply** button to save changes.
6. Click the **Payment** hyperlink. The **Payment Types** page opens.
7. In the **Use Below Payment Threshold** column, check the payment types for which you'd like to apply the threshold. For example, if you want customers to use cash or check when making purchases under \$300, select Cash and Check in the Use Below Payment Threshold column.
8. Click **Apply** to save changes.

10.7.5 Validate and Test

To validate that your Payment Threshold is functioning properly:

Prerequisites

Payment Threshold flag is enabled and the threshold value is set. See [Section 10.7.4, "Enable Payment Types and Threshold Limits"](#).

Responsibility

IBE_CUSTOMER

Login

Oracle iStore Customer UI (ibeCZzdMinisites.jsp or ibeCZzpHome.jsp)

Steps

1. In the Store Administration UI, for your store, enable Cash and Check as payment types. For steps, see [Section 10.4.3, "Enable Basic Payment Types"](#).
2. Set the threshold limit to \$300. This indicates that all payments under \$300 need to be paid for by cash or check. For steps, see [Section 10.7.4, "Enable Payment Types and Threshold Limits"](#).
3. Log in to the Customer UI. Add an item to your cart that is less than \$300.
4. Proceed to checkout.
5. In the **Payment and Billing Information** page, you should only see Cash and Check as payment types.

10.8 Setting up Item-Level Billing

B2B customers can select bill-to contacts, customers, and addresses at item level during checkout.

Note: Payment type must be Cash or Invoice to use item-level billing. Also, when using item-level billing, Purchase Order is not supported.

Enable item-level billing by setting the following profile option at the iStore application level:

- **ASO: Enable Line Level Billing = Yes.** By setting this profile to Yes, users can enter item-level billing information in the billing information page during checkout. If set to No, the functionality is disabled.

The profile option defaults to No if not set. You also can set this profile option at the site and responsibility levels.

10.9 Setting up Payment Commitments

A commitment is a contractual guarantee with a customer for future purchases, usually with deposits or prepayments. In Oracle iStore, B2B users select commitments during checkout. A merchant then creates invoices against the commitment to absorb the deposit or prepayment. Customers can use commitments for item-level products with any cart-level payment method.

To set up Payment Commitments:

- Define Commitments -- See [Section 10.9.1, "Define Commitment"](#).
- Enable Commitments -- See [Section 10.9.2, "Enable Commitment"](#).

10.9.1 Define Commitment

Commitments are defined with deposits or guarantees. See the *Oracle Receivables User's Guide* for information on how to set up commitments.

10.9.2 Enable Commitment

To enable commitments:

1. Set the following profile option at the application level for Oracle iStore.
 - **IBE: Use Commitments = Yes**. If set to No, commitments are not available.
The profile option defaults to No if not set.
2. If you set the above profile option to Yes, you must also set the following profile option:
 - **IBE: Authorize Payment Offline During Normal Checkout = Yes**. This disables online credit card authorization -- important because online credit card authorization is not possible with commitments.
3. Set the profile Sequential Numbering to **Not Used** at the Oracle iStore application level. If you are using Sequential Numbering with Oracle Receivables and still want to use commitments, you can keep the Sequential Numbering turned on at the site level and still enable commitments at the application level.

10.10 Setting up Shipping Functionality

Shipping methods are defined in Oracle Inventory.

- See *Oracle Inventory User's Guide* for details on how to set up shipping methods.

This section contains:

- [Section 10.10.1, "Setting up Shipping by Store"](#)
- [Section 10.10.2, "Setting Preferred Shipping Methods at Responsibility or User Level"](#)

- [Section 10.10.3, "Allowing Item-Level Shipping Methods"](#)
- [Section 10.10.4, "Allowing Users to Enter Shipping Information"](#)

10.10.1 Setting up Shipping by Store

You can specify the available shipping methods for each store. At checkout, Oracle iStore allows the customer to choose any shipping method that is enabled for both the specialty store and the inventory organization that is the item validation organization of the user's operating unit.

All shipping methods set up in Oracle Order Management display to the store manager in the iStore Administration UI. However, only those shipping methods set as web-enabled and enabled will be available to customers in the Customer UI.

Prerequisites

- Shipping methods have been set up.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration, and select the store for which you wish to add/alter shipping methods. Select **Update**.
2. Select the **Shipping** hyperlink. The Shipping page appears.
3. Use the Select checkboxes to select or de-select the shipping methods.
4. Select **Update** to save changes.

10.10.2 Setting Preferred Shipping Methods at Responsibility or User Level

If you wish to enable a single, preferred shipping method to display in the checkout pages for a specific user or user responsibility, set the following profile option at the user or responsibility level:

- **IBE: Preferred Shipping Method** --- <shipping method name>

The default value for this profile option is `null`.

10.10.3 Allowing Item-Level Shipping Methods

You can allow users to enter different shipping methods at the item level by setting the following profile option at the application level for Oracle iStore:

- **IBE: Use Line Level Shipping** --- If set to **Yes**, users can enter item-level shipping information in the shipping information page during checkout. If set to **No**, the functionality is disabled.

The profile option defaults to value **Yes** if not set.

Caution: If the profile option **IBE: Use Line Level Shipping** is set to **Yes**, you should also set the profile option **IBE: Merge Shopping Cart Lines** to **No**. You cannot enable shopping cart line merging and line splitting simultaneously.

Also, if the item-level shipping is not working, then be sure that the B2B user has the `IBE_CREATE_SHIPTO_CONTACT_ADDRESS` permission.

10.10.4 Allowing Users to Enter Shipping Information

You can allow store customers to enter shipping information during checkout, by setting the following profile option at the application level for Oracle iStore:

- **IBE: Use Shipping Instructions** --- If set to **Yes**, users can enter shipping instructions on the shipping information page during checkout. Set to **No** to disallow this feature.

This profile option defaults to **Yes** if not set.

Implementing Carts and Orders

This chapter contains information on implementing and configuring Oracle iStore 11i shopping carts and lists, order placement, order tracking, and customer contact information functionality.

Main topics in this chapter include:

- [Shopping Carts](#)
- [Shopping Cart Sharing](#)
- [Checkout and Order Placement](#)
- [Orders Business Flow](#)
- [Order Cancellation](#)
- [Order Tracking](#)
- [Oracle iStore and Party / Account Merge](#)

11.1 Shopping Carts

In Oracle iStore's customer-facing pages (Customer UI), shopping carts enable customers to store products that they may wish to purchase and then ultimately to purchase these items.

From an implementation perspective, the ability of users to create and save shopping carts is automatically enabled in your online specialty stores. The two optional cart features -- shopping lists and shared carts -- are controlled by profile options whose setups are discussed in this chapter.

To use any quotes functionality, you must integrate with Oracle Quoting.

To allow users to reject Terms and Conditions, you must integrate with Oracle Sales Contracts.

Topics in this section include:

- [Section 11.1.1, "Shopping Carts Overview"](#)
- [Section 11.1.2, "Shopping Cart Types and Characteristics"](#)
- [Section 11.1.3, "Using Shopping Carts"](#)
- [Section 11.1.4, "Active/Saved Carts Process Flow"](#)
- [Section 11.1.5, "Viewing a List of Saved/Shared Carts"](#)
- [Section 11.1.6, "Accessing Saved Carts"](#)
- [Section 11.1.7, "Working with the Active Cart"](#)
- [Section 11.1.8, "System-Saved and Default-Named Shopping Carts"](#)
- [Section 11.1.9, "Automatic Re-pricing of Cart Items"](#)
- [Section 11.1.10, "Using Pricing Agreements in Shopping Carts"](#)
- [Section 11.1.11, "Using Promotion Codes in Shopping Carts"](#)
- [Section 11.1.12, "Using Attachments in Shopping Carts"](#)
- [Section 11.1.13, "Checking Item Availability in Shopping Carts"](#)
- [Section 11.1.14, "Shopping Lists"](#)
- [Section 11.1.15, "Using Direct Item Entry"](#)
- [Section 11.1.16, "Shopping Cart Security"](#)
- [Section 11.1.17, "Tax Display in Shopping Carts"](#)
- [Section 11.1.18, "Shopping Cart Expiration Values"](#)
- [Section 11.1.19, "Merging Duplicate Items in Cart"](#)
- [Section 11.1.20, "Decimal Quantities for Cart Items"](#)

Please refer to the following topics for additional information:

- **Cart Sharing** --- Cart sharing is enabled by setting a profile option. Cart sharing is covered in [Section 11.2, "Shopping Cart Sharing"](#).
- **Configured Items** --- Configured items require integration with Oracle Configurator. Information about configured items and Oracle iStore shopping carts is available in [Section 22.3.1, "Customer UI Configurator Business Flow"](#).

- **Bills of Material** --- Information about product model bundles can be found in [Section 21.2, "Oracle iStore Functionality with Oracle Bills of Material"](#).
- **E-mail Notification Events** --- Information about e-mail notification events related to shopping carts can be found in [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#).
- **Cart Display Templates** --- Information about the Display Templates that control the flow and appearance of the shopping cart pages can be found in [Chapter 8, "Implementing Customer UI Display"](#), and [Appendix E, "Display Templates and Media Objects"](#). Advanced display topics, including limited customizing information, can be found in [Appendix D, "Advanced Display"](#).

11.1.1 Shopping Carts Overview

For both B2B and B2C users, Oracle iStore shopping carts are characterized by the following:

- Users can add items to the active cart at any time.
- Users can maintain any number of carts.
- Users can save carts for retrieval up until the expiration date, which is specified in a profile option discussed in [Section 11.1.18, "Shopping Cart Expiration Values"](#). Oracle iStore resets the expiration date each time a user updates the cart or the cart is saved.
- Under various conditions, the system saves carts for users. This functionality is described in [Section 11.1.8, "System-Saved and Default-Named Shopping Carts"](#).
- The shared cart feature allows users to participate in collaborative shopping and purchasing. This feature can be turned on or off by setting a profile option. Oracle iStore automatically sends e-mail messages to users sharing carts.
- Carts can be saved as shopping lists and then re-utilized as carts; this functionality is controlled by a profile option.
- If integrating with Oracle Quoting, sales-representative-assisted carts become quotes that can be altered by sales representatives and then later published to the customer-facing pages in Oracle iStore. Quotes created in Oracle Quoting can also be published to the iStore customer.
- A full **Cart** menu enables self-service management of users' carts.
- As with all Customer UI pages, the pages that display shopping cart functionality use seeded Display Templates, allowing a wide range of display

possibilities. A complete list of Display Templates is contained in [Appendix E, "Display Templates and Media Objects"](#). For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

- Note that cart versioning no longer takes place in Oracle iStore with this release.

11.1.2 Shopping Cart Types and Characteristics

In Oracle iStore, shopping carts are categorized as follows:

- **Active Shopping Carts** --- In a user session in the Customer UI, an active cart is the cart currently being updated by the user. See [Section 11.1.7, "Working with the Active Cart"](#), for more information.
- **Saved Shopping Carts** --- A saved cart is a cart which has been saved for later use. See [Section 11.1.4, "Active/Saved Carts Process Flow"](#), [Section 11.1.6, "Accessing Saved Carts"](#), and [Section 11.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.
- **Quotes** --- Quotes are either sales representative-published quotes or carts for which users have requested sales assistance. Quotes can be shared. This functionality requires integration with Oracle Quoting. See [Section 11.2.6, "Quote Sharing"](#), [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), and [Section 11.3.4, "Requesting Sales Assistance During Checkout"](#), for more information.
- **Shared Shopping Carts** -- A shared cart is a shopping cart shared with other users. See [Section 11.2, "Shopping Cart Sharing"](#), for more information.

11.1.3 Using Shopping Carts

The **Cart** menu in the Customer UI allows users to manage their shopping carts. Users select the **Cart** icon in the Customer UI screen to access this menu. The following subtabs are available within the **Cart** menu, for both B2B and B2C users:

- **Shopping Cart Page** --- This page always shows the user's active cart. See [Section 11.1.7, "Working with the Active Cart"](#), for more information.
- **My Shopping Lists Page** --- This page contains a user's saved shopping lists, if this functionality is enabled. See [Section 11.1.14, "Shopping Lists"](#), for details.
- **My Carts Page** -- This summary page lists all of a user's shopping carts, including shared carts. See [Section 11.1.5, "Viewing a List of Saved/Shared Carts"](#), for more details.

- **My Quotes Page** --- This summary page lists all of a user's quotes, including shared quotes, if Oracle Quoting integration has been implemented. See:
 - [Section 26.2, "Oracle iStore Functionality with Oracle Quoting"](#), in [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#)
 - [Section 11.2.6, "Quote Sharing"](#)
- **Direct Item Entry Page** --- This page allows users to quickly add items to a shopping cart through the use of Oracle iStore's Direct Item Entry functionality. See [Section 11.1.15, "Using Direct Item Entry"](#).

11.1.4 Active/Saved Carts Process Flow

The following is a high-level process flow for active and saved shopping carts in Oracle iStore's Customer UI pages.

Note: Carts must be active to be modified by the user.

1. A user enters a specialty store and adds one or more items to the shopping cart by selecting the **Add to Cart** button. The cart, which is now the user's *active* cart, appears within the **Shopping Cart** subtab in the **Cart** menu, with the page title, **Your Shopping Cart**.

To add an item to an active cart, the user can be a guest or a signed-in user. The user will be required to sign in when he attempts to save the cart.

When the user selects the **Add to Cart** button in the catalog pages, if the user already has an active cart (whether an unsaved cart or a saved cart), Oracle iStore will add the items to the *existing* active cart.

If user has a *shared* cart as his active cart --- and the user has items in the cart and then signs-in --- Oracle iStore de-activates the shared cart and makes the guest cart the active cart. The user can retrieve the cart in the My Carts page.

2. The user can press the **Save Cart** button in the **Your Shopping Cart** page to save the active cart. This de-activates the cart. The user can then create a new active cart and access the saved cart at a later time.

In addition, please note the following:

- The user can verify that the cart has been saved by viewing the cart name at the top of the cart.
- A shopping cart can be saved at any time, until the order is placed with the cart. After order placement, the cart will no longer be available to the user,

whether he has saved it or not. The user does not need to save the cart to place an order with it.

- Cart versioning no longer takes place in Oracle iStore, beginning with the 11.5.9 release.
- 3. If the user attempts to save the cart and the cart does not yet have a user-defined name (it may already have a system-saved name), after selecting the **Save Cart** button, the user is given the following choices in the **Save Cart** page:
 - a. **Create a new saved cart** --- To create a new cart, the user selects the **Cart Name** radio button. The user must then enter a name for the cart. The name does **not** have to be unique.
 - b. **Add items to an existing cart** -- This option is only available if the user has at least one saved cart. To add items to an existing cart, the user selects the **Add to Existing Cart** radio button and selects an existing saved cart from the existing carts drop-list. If this option is chosen, all items added to the cart inherit cart-level information of the target cart.

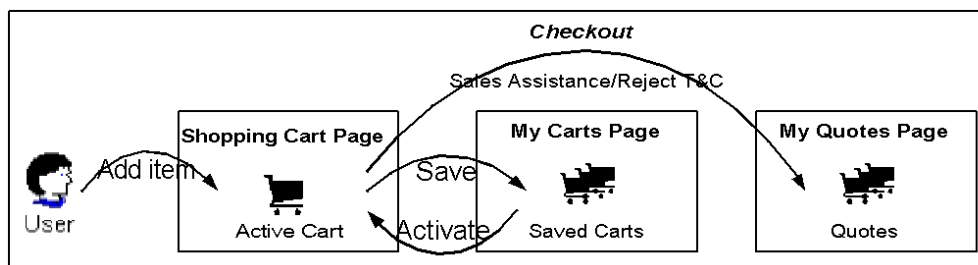
If the cart already has been saved/named by the user, then the cart is simply re-saved when the user presses the **Save Cart** button. Pressing the **Save Cart** button de-activates the cart, and a new, active cart becomes available.

- 4. To complete the save process, the user selects the **Apply** button and a confirmation message is displayed.

The expiration date for the cart is set to the value determined by the cart expiration profile value. The expiration date can be seen by the user in the **My Carts** and saved/shared carts details pages. See [Section 11.1.18, "Shopping Cart Expiration Values"](#), for more information.

- 5. The user can access the saved cart at any time. See [Section 11.1.6, "Accessing Saved Carts"](#). The user must log in to access a saved cart.

The following diagram shows the active/saved cart process.

Figure 11–1 Active/Saved Cart Process Flow

11.1.5 Viewing a List of Saved/Shared Carts

To view a list of saved or shared carts, both B2B and B2C registered users select the **Cart** icon in the Customer UI, and then select the **My Carts** subtab.

In the **My Carts** page, carts are organized by type, with the most recently created cart appearing first in its section. Each shopping cart also will display its expiration date in this page.

See also: [Section 11.1.7, "Working with the Active Cart"](#)

Note: The **My Carts** page is different for B2C and B2B users.

The main sections on the **My Carts** page are:

- **Saved Carts** --- This section contains a user's saved carts. Both B2C and B2B users will see this section.
- **Shared Carts** --- This section contains a user's shared carts, separated by type:
 - **Carts Shared By You** --- This section lists carts the user is currently sharing with other users. Both B2C and B2B users will see this section.
 - **Carts Shared With You** --- A section with this label exists only for B2B users. It lists carts that another user is sharing with the user.
 - **Cart Retrieval Textbox** --- Instead of a **Carts Shared With You** section, B2C users will see a cart retrieval textbox. By entering in the box the unique cart retrieval number, B2C users can retrieve a shared cart. See [Section 11.2.5, "B2C Shared Cart Retrieval Process"](#), for more information.

For B2B backward compatibility, this textbox also can be enabled to allow B2B users to enter a cart retrieval number from shared carts of previous Oracle iStore versions, and thus retrieve one of these older shared carts. For B2B users only, this textbox is enabled by a profile option. See [Section 11.2.4,](#)

"B2B Shared Cart Retrieval Process", and [Section 11.2.8, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#), for more information.

The cart names are hyperlinks with which the user can access the **Saved Cart Details** and **Shared Cart Details** pages. See [Section 11.1.6, "Accessing Saved Carts"](#), [Section 11.2.4, "B2B Shared Cart Retrieval Process"](#), and [Section 11.2.5, "B2C Shared Cart Retrieval Process"](#), for more information.

Additionally, the **My Carts** page has the following behavior:

- Quotes never appear on this page.
- If the user's active cart is a saved or shared cart, then the cart will have a graphic icon (star) next to it, to visually represent the cart. You can see an example of this icon in the **My Carts** page figures on the following pages.
- Once an order is placed with a cart (whether active, saved or shared) it no longer appears here.
- If a cart owner stops sharing a cart it disappears from the list of shared carts on this page.
- If a recipient removes access to a shared cart, the shared cart disappears from the recipient's lists of carts.

B2B and B2C users will see different versions of the **My Carts** page, as shown in the following two figures.

Figure 11–2 My Carts Page - B2BUsers

My Carts

 Indicates your current cart

Saved Carts

Click on a cart name to view the details.

Cart Name	Created Date	Expiration Date
Desktop for Home 	10-OCT-2001	30-OCT-2001
music	9-OCT-2001	30-OCT-2001

Shared Carts

Click on a cart name to view the details.

Carts Shared With You

Cart Name	Created Date	Expiration Date	Owner	Access Level
Christmas list	12-Mar-2002	12-Mar-2002	Sanjay Narang	Full
Published cart	15-Apr-2002	15-Apr-2002	Inderpreet Wadhwa	Read Only
computer	12-Mar-2002	12-Mar-2002	Ron Huddleston	Update
notebook	15-Apr-2003	15-Apr-2003	Ron Huddleston	Read Only

Carts Shared By You

Cart Name	Created Date	Expiration Date
test	12-Mar-2002	12-Mar-2002
Published cart	15-Apr-2002	15-Apr-2002

Figure 11–3 My Carts Page - B2C Users

My Carts

 Indicates your current cart

Saved Carts

Click on cart name links to view the details.

Cart Name	Created Date	Expiration Date
Desktop for Home	10-OCT-2001	30-OCT-2001
test2	9-OCT-2001	30-OCT-2001

Shared Carts

Retrieve Shared Cart

Please enter Sharee / Retrieval number from e-mail notification and click on 'Retrieve'

Carts Shared By You

Cart Name	Created Date	Expiration Date
Christmas list 	12-Mar-2002	12-Mar-2002
Published cart	15-Apr-2002	15-Apr-2002

For more information, see:

- [Section 11.1.6, "Accessing Saved Carts"](#)
- [Section 11.2.4, "B2B Shared Cart Retrieval Process"](#)
- [Section 11.2.5, "B2C Shared Cart Retrieval Process"](#)

11.1.6 Accessing Saved Carts

From the **My Carts** page, the user selects the hyperlink of the saved cart name to retrieve the **Saved Cart Details** page.

The following figure shows an example of the **Saved Cart Details** page.

Figure 11–4 Saved Cart Details Page

Saved Cart Details: Desktop for Home

Delete Cart

Share Cart

Express Checkout

Checkout

Cart Information

Update Cart

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
					Sub-Total: \$3,376.28 Tax: \$0.00 Shipping & Handling: \$14.95	
						Total: \$3,391.23

Customer Information

Customer: Oracle Corp.
Tim Smith
(408)234-5678
tsmith@oracle.com

Agreement: B2B
Contract: 12345

Shipping Information

Ship To: Tim Smith
 Oracle Corp.
 500 Oracle Park Way
 REDWOOD SHORES, CA 94404
 UNITED STATES

 Shipping Method: AIR
 Requested Delivery Date: Aug-12-2002
 Shipping Instructions: sent by UPS
 Packing Instructions: fragile

Billing and Payment Information

 Bill To: Tim Smith
 Oracle Corp.
 500 Oracle Park Way
 REDWOOD SHORES, CA 94404
 UNITED STATES

 Payment Type: Tim Smith, Visa,
 xxxxxxxxxx1111, 01/2003

 PO Number: CA18950

From the **Saved Cart Details** page, the user can perform the following actions:

1. **Activate (Update) the Cart** -- In order to activate the cart, the user must press the **Update Cart** or **Checkout** buttons --- a cart must be active in order for the user to modify it. An active cart always appears under the **Shopping Cart** subtab, with the page title, **Your Shopping Cart**. See [Section 11.1.7, "Working with the Active Cart"](#), for details about active carts.

If the user already has an unsaved active cart with at least one item in it and then presses **Update Cart**, Oracle iStore automatically saves the unsaved active cart and moves it to a inactive state; this system-saved cart will display on the **My Carts** page, in the **Saved Carts** area. The name of a system-saved cart is

determined by system settings. See [Section 11.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.

In the case where a user is working on another saved cart or shared cart, then these are automatically saved as well.

Whenever the user updates a cart, the items prices are re-verified by the Pricing Engine and are re-priced if necessary. See [Section 11.1.9, "Automatic Re-pricing of Cart Items"](#), for more information.

2. **Share the cart** --- If this functionality is enabled, the user may select the **Share Cart** button to begin the process of sharing the cart. See [Section 11.2, "Shopping Cart Sharing"](#), for details on cart sharing functionality.
3. **Checkout/Place Order** --- Once he retrieves the cart, the user can press the **Checkout** button to enter the checkout phase and place an order with the cart. Once the order is placed, the cart is no longer available to the user.
4. **Delete the cart** --- The user may select the **Delete Cart** button to delete the cart. After pressing **Delete Cart**, the user will see a warning message --- the user can select **Yes** to delete the cart or **No** to cancel the delete cart operation. The user will not be able to access a deleted cart. A confirmation message is shown when the user deletes the cart.
5. **View Line Details** --- An icon displays in a column entitled Line Details, if **any** of the following four profiles options is enabled; this link/icon will **not** appear if **all** of these profiles are turned off. The profiles are:
 - **IBE: Use Line Level Shipping**
 - **ASO: Enable Line Level Billing**
 - **IBE: Use Line Agreements**
 - **IBE: Use Commitments**

The following figure shows an example of the **Line Details** page.

Figure 11–5 Line Details Page

Line Details: Vision Pad DX - Mobile Computer	
Ship To:	Tim Smith Oracle Corp. 500 Oracle Park Way REDWOOD SHORES, CA 94404 UNITED STATES
Shipping Method:	AIR
Requested Delivery Date:	Aug-12-2002
Shipping Instructions:	sent by UPS
Packing Instructions:	fragile
Bill To:	Tim Smith Oracle Corp. 500 Oracle Park Way REDWOOD SHORES, CA 94404 UNITED STATES
Agreement:	ORCB2B12345
Commitment Name:	

[Close](#)

Once the user activates the cart by pressing the **Update Cart** or **Checkout** buttons, the cart becomes the active cart. See [Section 11.1.7, "Working with the Active Cart"](#), for more information.

11.1.7 Working with the Active Cart

The active cart is the cart currently being updated by the user. It always appears under the **Shopping Cart** subtab within the **Cart** menu, and has the page title, **Your Shopping Cart**. Only one cart can be active for a user at a time.

To activate a saved or shared cart, the user must press either the **Update Cart** or the **Checkout** button in the **Saved** or **Shared Cart Details** pages.

If no items are in the active cart, then the only button shown in the cart page is the **Continue Shopping** button. However, if the user had added items --- and/or other information, such as address or payment options, or if the system had defaulted in the information for the user --- and the user proceeds to remove all the items in the cart, the system will still allow the user to save or share the cart.

In the active cart, the user can perform the following actions:

1. **Continue Shopping** --- The user may select the **Continue Shopping** button to continue browsing the web site and potentially add more items to the active cart.
2. **Save the cart** --- See [Section 11.1.4, "Active/Saved Carts Process Flow"](#), for details.
3. **Delete items** --- The user can select the **Delete** icon to remove items from the cart.
4. **Recalculate the cart** --- The user can press the **Recalculate** button to recalculate the cart totals.
5. **Access Pricing Agreements** --- See [Section 11.1.10, "Using Pricing Agreements in Shopping Carts"](#), for details.
6. **Use Promotion Codes** --- See [Section 11.1.11, "Using Promotion Codes in Shopping Carts"](#), for details.
7. **Add Attachments** --- See [Section 11.1.12, "Using Attachments in Shopping Carts"](#), for details.
8. **Check Item Availability** --- See [Section 11.1.13, "Checking Item Availability in Shopping Carts"](#), for details.
9. **Share the cart** --- See [Section 11.2, "Shopping Cart Sharing"](#), for details.
10. **Save the cart as a list** --- See [Section 11.1.14, "Shopping Lists"](#), for details.
11. **Checkout** --- The user can press **Checkout** to place the order. See [Section 11.3, "Checkout and Order Placement"](#), for more information.
12. **Express Checkout** --- The user press the Express Checkout button to submit the cart as an Express Checkout order. See [Section 11.3.8, "Express Checkout"](#), for details.

Note that some of this functionality requires additional setup steps.

The following figure shows an example of the **Your Shopping Cart** page.

Figure 11–6 Your Shopping Cart Page

Your Shopping Cart

Continue Shopping Express Checkout Checkout

Items Pricing Agreements Promotion Codes Attachments Check Availability

Save Cart Save To List Share Cart

✓ This saved cart 'Desktop for Home' expires on 01-Aug-2002.

Delete	Part Number	Item	UOM	Quantity	Unit Price	Total Price
	AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<12.50> Net: \$237.49	List: \$249.99 Discount: \$<12.50> Net: \$237.49
	AS66311	Sentinel Custom Desktop Configuration Details	Each	1	List: \$2,803.99 Discount: \$<140.20> Net: \$2,663.79	List: \$2,803.99 Discount: \$<140.20> Net: \$2,663.79
	CM76840	Lightning Inkjet Printer	Each	1	List: \$300.00 Discount: \$<15.00> Net: \$285.00	List: \$300.00 Discount: \$<15.00> Net: \$285.00

Delete Cart

Sub-Total: \$3,376.28
Tax: \$0.00
Shipping & Handling: \$14.95

Recalculate **Total: \$3,391.23**

11.1.7.1 Identification of Active Carts for Users

The following behavior exists with active carts and user identification:

- For returning and guest users for whom there is a cookie, the active cart is identified from the cookie.
- For logged-in users -- when there is no cookie for the user -- the active cart is identified from the database. Otherwise, the active cart is identified from the cookie.
- For guest users who do not have an associated cookie, a new cart is created. The cart creation happens in the background and is transparent to the guest user.

11.1.8 System-Saved and Default-Named Shopping Carts

Whenever a new cart is created by the system --- for example, when a user adds an item to a cart for the first time --- it is given a default name, which can be defined by the merchant. When this default-named cart gets saved while activating another cart, it becomes a system-saved cart and is given the system-saved name, as set up by the merchant.

Example:

1. A user with no active cart selects the **Add to Cart** button. A cart is immediately created for the user, which is now the user's active cart (Cart A).

At this point, the system has named Cart A, "**Store**" (this name can be specified by the merchant -- see [Section 11.1.8.1, "Naming Behavior for System-Saved and Default-Named Carts"](#), below).

2. The user leaves this active cart (Cart A) and navigates to the **My Carts** page. He selects a previously saved cart (Cart B) and updates/activates it (by pressing **Update** or **Checkout** button).

At this point, the system gives Cart A the default system-saved name, **Store Saved** (this name can be specified by the merchant -- see [Section 11.1.8.1, "Naming Behavior for System-Saved and Default-Named Carts"](#), below).

3. At any point in this process, the user can explicitly save the cart by selecting the **Save Cart** button. See [Section 11.1.4, "Active/Saved Carts Process Flow"](#), for more information.

11.1.8.1 Naming Behavior for System-Saved and Default-Named Carts

The default name given to default-named and system-saved carts can be controlled by mapping a source file to the message-class media objects associated with these carts, or by updating the FND message text in Oracle Forms.

Note: It is not required that you change the names of system-saved and default-named carts. By default, their names will be **Store** (default-named) and **Store Saved** (system-saved). However, these names can be changed if desired.

Out-of-the-box, these media objects have no store/language mapping. Oracle iStore uses an API to get the cart name, and this API returns a custom prompt (media object store/language mapping), if defined; otherwise, it returns the FND message text.

A cart name can be mapped to all stores and all languages, or can be mapped by store/language, using standard Oracle iStore media object store mapping functionality. For more information, see [Section 8.5, "Understanding Media Objects"](#).

To change the name of the carts using Oracle Applications text messages, you can update the FND message text. See [Section 14.2, "Modifying Text Messages"](#), for steps.

Following are the values for the two message-class media objects for default-named and system-saved carts:

- **iStore Default-Named Cart Name** media object:

Programmatic access name: IBE_PRMT_SC_UNNAMED

Default FND message text: Store

- **iStore System-Saved Cart Name** media object:

Programmatic access name: IBE_PRMT_SC_DEFAULTNAMED

Default FND message text: Store Saved

11.1.9 Automatic Re-pricing of Cart Items

Items in shopping carts get re-priced any time a user updates the cart. This includes, for example, adding items to the cart or changing shipping/billing information. Only an active cart can be modified -- users must press the **Update Cart** or the **Checkout** button in order to activate a cart.

Assuming **IBE: Use Price List Associated with Specialty Store** profile is **Yes** (meaning that the store where the user is shopping is using a static, assigned price list for a particular currency), if an item has been re-priced on the assigned price list, Oracle iStore's Pricing Engine finds and displays the correct, updated price. In the case where an item in the user's cart has been removed from the price list, then an error message will display in the cart.

If **IBE: Use Price List Associated with Specialty Store** profile is **No**, Oracle iStore will be retrieving "best prices" dynamically from the Pricing Engine, and will not be retrieving prices from a static price list (except for guest users). In this case, if an item has been deleted from available price lists, an error will occur when the user updates the cart. See [Chapter 9, "Implementing Pricing"](#), for more information on pricing.

Note: In previous releases, the profile option, **IBE: Shopping Cart Price based on Owner**, could be used in shared carts functionality to change the pricing in the cart from the cart owner to the recipient. In current share cart functionality, the cart pricing always will be based on the cart owner. The profile option, **IBE: Shopping Cart Price based on Owner**, is obsolete in this release of Oracle iStore.

11.1.10 Using Pricing Agreements in Shopping Carts

A B2B user with the IBE_USE_PRICING_AGREEMENT permission in his user role will see the **Pricing Agreements** link in the **Your Shopping Cart** page. For a list of seeded roles and their default permissions, see [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).

Note: Pricing Agreements must first be implemented before they can be selected by a user in the Customer UI. See [Section 9.10, "Pricing Agreements"](#), in [Chapter 9, "Implementing Pricing"](#), for setup information.

Cart-level and item-level scenarios are possible with pricing agreements:

- **Cart-Level Agreements** --- When the user selects the **Pricing Agreements** link, the page will display a *Cart Agreements* section showing any previously selected cart-level agreements.

To select a new agreement, the user selects the **Assign Agreement** button to select from a list of agreements that have been implemented. Optionally, if an agreement has been selected, the user can press the **Remove Agreement** button to remove the agreement association for the shopping cart.

- **Item-Level Agreements** --- If the profile option, **IBE: Use Line Agreements**, has been enabled, the user also will see a section entitled *Item Agreements*. In this section, the user can use the **Assign Agreement** and **Remove Agreement** buttons to add/remove item-level agreements in the shopping cart.

The figure below shows an example of the **Pricing Agreements** page within the **Your Shopping Cart** page.

Figure 11–7 Pricing Agreements Page

Your Shopping Cart

[Items](#)
[Pricing Agreements](#)
[Promotion Codes](#)
[Attachments](#)
[Check Availability](#)

Cart Agreement

Remove Agreement

Assign Agreement

Agreement: iStoreQAPrcAgr1

Payment Terms: 30 Net

Price List: iStoreQA1

Item Agreements

Select an Item and...

Remove Agreement

Assign Agreement

Select	Part Number	Item	UOM	Quantity	Agreement Name	Payment Terms	Price List
☐	AS66311	Vision Pad DX - Mobile Computer	Each	1	iStore Line Level Agreement	30 Net	iStoreLineLevel
☐	AS66311	Vision Pad DX - Mobile Computer	Each	1	iStore Line Level Agreement	30 Net	iStoreLineLevel
☐	AS66311	Vision Pad DX - Mobile Computer	Each	1	iStoreQAPrcAgr1	30 Net	iStoreQA1

11.1.11 Using Promotion Codes in Shopping Carts

The **Promotion Codes** link in the **Your Shopping Cart** page allows both B2C and B2B users to enter promotion codes that have been set up through Oracle Order Management.

Note: Promotion codes are modifiers set up through the Oracle Order Management Pricing module. Promotion codes must first be set up before customers will be able to enter them in the shopping cart. Limited setup information can be found in [Section 9.6.2, "Create Discount Modifier"](#), in [Chapter 9, "Implementing Pricing"](#). See the *Oracle Order Management Suite Implementation Manual* for complete details. A profile option controls the appearance of the Promotion Codes link; see [Section 11.1.11.1, "Setting the Promotion Codes Profile Option"](#), below.

After the user selects the **Promotion Codes** link, the screen refreshes with the **Promotion Codes** area showing in the page. Any previously entered promotion codes will display. To enter a new promotion code, the user presses the **Add Promotion Code** button and enters the code in the **Promotion Code** textbox. The user selects the **Apply** button to save the entry.

The figure below shows an example of the **Promotion Codes** page within the **Your Shopping Cart** page.

Figure 11–8 Promotion Codes Page

Your Shopping Cart

[Items](#) [Pricing Agreements](#) [Promotion Codes](#) [Attachments](#) [Check Availability](#)

Enter your Promotion Codes and click 'Add'. Please note that Promotion Codes are case sensitive.

Promotion Code:

11.1.11.1 Setting the Promotion Codes Profile Option

The **Promotion Codes** link is enabled/disabled by the following profile option:

- **IBE: Use Promotion Code** --- This profile option controls the appearance of the Promotion Codes link in the shopping cart. Set the profile to **Yes** to enable the link and its related functionality, or to **No** to disable.

You can set this profile option at iStore application level, or at responsibility level to the iStore customer responsibility which maps to the applicable specialty store.

The default value at the iStore application level is **Yes**. Null also is treated as Yes.

11.1.12 Using Attachments in Shopping Carts

A B2B user with the **IBE_USE_ATTACHMENT** permission in his user role will see the **Attachments** link in the **Your Shopping Cart** page. For a list of seeded roles and their default permissions, see [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).

The Attachments functionality is not available for B2C users.

After the user selects the **Attachments** link, the screen refreshes and shows any previously selected attachments associated with the cart. To add an attachment from the file system, the user selects the **Add Attachment** button. In the file retrieval page that displays, the user selects the **Browse** button to select the attachment from the file system. Optionally, the user can enter a description for the

file in the **Description** textbox. The user selects the **Apply** button to save the file selection.

Optionally, in the **Attachments** page, the user can select the **Remove** icon to remove attachments from the cart.

The figure below shows an example of the **Attachments** page within the **Your Shopping Cart** page.

Figure 11–9 Attachments Page

Your Shopping Cart			
Items Pricing Agreements Promotion Codes Attachments Check Availability			
Add Attachment			
File	Description	Added Date	Remove
test.doc	this is a test document	May-18-2002	

11.1.13 Checking Item Availability in Shopping Carts

Both B2B and B2C users can select the **Check Availability** link in the **Your Shopping Cart** page to check whether items in their carts will be available for shipping by a specified date.

Note: You must first set up ATP before it will be available in the shopping cart. See [Section 6.4, "Providing Regular Available to Promise \(ATP\)"](#), and [Chapter 20, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#), for setup details.

After the user selects the **Check Availability** link, the **Your Shopping Cart** page refreshes, displaying a list of cart items, along with a calendar icon to select the date for which the customer would like to check availability. The user selects the date(s), then presses the **Check Availability** button to display the availability information in the table column labelled **Availability Info**.

The figure below shows an example of the **Check Availability** page within the **Your Shopping Cart** page.

Figure 11–10 Check Availability Page

Your Shopping Cart

Items

Pricing Agreements

Promotion Codes

Attachments

Check Availability

Part Number	Item	UOM	Quantity	Needed Date	Availability Info
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available
AS66311	Vision Pad DX - Mobile Computer	Each	1	May-17-2002 	Available

Check Availability

11.1.14 Shopping Lists

Shopping lists allow users to save items in shopping carts to lists. Users can copy items from these lists into their active cart. Shopping lists never expire. Users cannot check out with a shopping list.

The **IBE: Use Shopping Lists** profile option controls whether the shopping list functionality is available to users. See [Section 11.1.14.2, "Setting the Shopping Lists Profile Option"](#), for details.

Shopping lists are accessible in the **My Shopping Lists** subtab in the **Cart** menu in the Customer UI. The most recently saved list appears first in the table.

Users can update a shopping list at any time by selecting the hyperlink of the list name. See [Section 11.1.14.1, "Shopping List Process Flow"](#), below, for more information on the actions that can be performed in the shopping list details page.

Note that Express Checkout is not allowed from a shopping list, but can be accessed after the user drills down into the item details (assuming Express Checkout is enabled).

11.1.14.1 Shopping List Process Flow

Following is the process flow for shopping lists:

1. User presses the **Save To List** button in the **Your Shopping Cart** page.
2. The system prompts the user to enter a new name for the list or to merge the items to an existing list (if one exists). The list name must be unique.

Optionally, the user can enter comments for the list in the **Comments** textbox.

The user's current active cart -- including the items in it -- remains the active cart when a shopping list is saved.
3. To retrieve a shopping list, the user navigates to the **My Shopping Lists** page within the **Cart** menu, and selects the hyperlink of the desired list name. The **Shopping List Details** page appears.

The figure below shows an example of this page:

Figure 11-11 Shopping List Details Page

Shopping List Details: Shopping List for January 13

Delete List Update Quantity

Select Item(s) and... Delete Add to Cart

Select All | Select None

Select	Part Number	Item	UOM	Quantity
☐	Paithini Saree..	Paithini Saree	Each_US	1
☐	AS72111..	Envoy Deluxe Laptop	Each_US	1
☐	AS66311..	Vision Pad DX - Mobile Computer	Each_US	1

4. To add items to a cart, in the **Shopping List Details** page, the user selects the appropriate items in the shopping list and presses the **Add to Cart** button.
5. Optionally, in the **Shopping List Details** page, the user also can:
 - Update quantities for items in the list by entering the numerical values in the Quantity field and pressing the **Update Quantity** button.
 - Delete items in the list by activating an item's **Select** checkbox and pressing the **Delete** button (not the Delete List button).
 - Drill down to product details by selecting the hyperlink of an item name. At this point, the user can add the item to a new cart and checkout, including Express Checkout.

- Delete the entire list by selecting the **Delete List** button.
- 6. Once the user presses **Add to Cart** from the **Shopping List Details** page:
 - If an active cart with items is in use by the user, the items are added to the existing active cart.
 - If no active cart exists, a new cart is created which is the user's active cart.
 - The shopping list still will continue to appear in the **My Shopping Lists** page, with the original items in it.
- 7. The user can perform normal activities with the active cart. For more information on these flows, see: [Section 11.1.7, "Working with the Active Cart"](#).

11.1.14.2 Setting the Shopping Lists Profile Option

To enable shopping lists, set the following profile option at the application level to iStore:

- **IBE: Use Shopping Lists** --- This profile option specifies whether shopping list functionality is available to customers. Set to **Yes** to enable the feature, or **No** to disable the feature.

The profile option defaults to Yes if not set.

11.1.14.3 Shopping Carts and Shopping Lists Serve Different Purposes

Shopping carts and shopping lists serve different purposes for Customer UI users. The following two sections note some differences and similarities between the use of shopping carts and shopping lists.

11.1.14.3.1 Shopping Carts Shopping carts are transactional entities used to checkout with and purchase products from the Customer UI.

- Shopping carts are associated with the organization specified in the MO: Operating Unit profile option. In this way, the same shopping cart can potentially be accessed across different stores.
- The user creates a shopping cart by pressing the Add to Cart button in the catalog pages.
- The merchant can set an expiration time period for carts.
- Shopping carts can be shared with other users, if this functionality is enabled.

- Shopping carts contain transactional data (item prices, shipping/handling, tax, and total amounts) and customer information (addresses, billing, and shipping preferences).

11.1.14.3.2 Shopping Lists Shopping lists are non-transactional entities that store products the user may wish to purchase. They help to enable future repeated purchases.

- The user creates a shopping list by pressing the **Save to List** button from active cart (**Your Shopping Cart** page).
- The merchant can turn shopping list functionality on/off with a profile option.
- Users can add comments to shopping lists.
- A shopping list must have a unique name when saved.
- A shopping list never expires.
- Shopping lists do not contain any transactional information, such as item prices; they also do not show customer address, billing, or shipping data.
- A shopping list cannot be shared with other users.

11.1.15 Using Direct Item Entry

For B2B users in the shopping cart pages, Oracle iStore's Direct Item Entry functionality allows the following:

- Users can enter data quickly without having to add items one at a time from the catalog.
- The user can enter an Oracle Inventory product number in the **Direct Item Entry** form and proceed to checkout with the item in his cart, eliminating the steps required to browse for the item, add it to the cart, and checkout.
- Optionally, if you set up merchant-to-customer part number mapping in Oracle Inventory, the Direct Item Entry functionality allows users to place orders with their company's internal part numbers in a similar manner.

Note that this functionality is available only for B2B users.

11.1.15.1 Direct Item Entry Flow in Customer UI

Following is the process flow for Direct Item Entry:

1. A user logs into a specialty store.

2. The user selects the **Cart** icon to retrieve the **Cart** menu.
3. The user selects the **Direct Item Entry** subtab within the **Cart** menu. The Direct Entry Form appears.
4. To place an order for an Oracle Inventory product, the user enters the known part number in the **Part Number** field. The user can select the **Fill Details** button to populate the form with the description of the item.
5. If merchant-to-customer part number mapping has been established, the user can enter a known part number in the **Customer Part Number** column. The user can select the **Fill Details** button to populate the form with the description of the item.
6. The user activates the checkboxes next to the items he wishes to order.
7. The user selects **Add to Cart**. The items are added to the shopping cart and the user can proceed to checkout.

11.1.15.2 Enabling Direct Item Entry

This section contains high-level steps for implementing the Direct Item Entry functionality in Oracle iStore.

Steps

1. Set iStore's Direct Item Entry profile option:

To enable Direct Item Entry functionality in Oracle iStore, set the following profile option to **Yes** at the **iStore** application level:

- **IBE: Use Direct Item Entry** --- This profile option specifies whether the Direct Item Entry functionality is available in the Carts menu.

2. Optionally, set up Item Mapping in Oracle Inventory.

Before B2B customers can use their companies' internal part numbers for Direct Item Entry, mappings must be established between the customer items and the merchant items in Oracle Inventory.

For directions on how to map customer items to items in Oracle Inventory, refer to the *Oracle Inventory User's Guide*.

3. Regenerate flexfields in Oracle Applications.

You must regenerate the flexfields in Oracle Applications after making the Inventory item mapping changes. Refer to *Oracle Applications System Administrator's User Guide* for details.

The guides discussed in this section are available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

11.1.16 Shopping Cart Security

Oracle iStore uses security authentication to keep different users from accessing each others' shopping carts and shopping lists by manipulating the URL. When a user attempts to retrieve a cart, Oracle iStore verifies that the user is actually the owner of the shopping cart or a user to whom the cart has been shared; if the user is found to be neither the owner nor a recipient of the cart, then access is denied.

11.1.17 Tax Display in Shopping Carts

Oracle iStore supports both cart-level and item-level tax display in the shopping carts.

Tax information is set up in Oracle Receivables. See the *Oracle Receivables User Guide* for information on how to set up taxes.

11.1.17.1 Cart-Level Tax Display

Out-of-the-box, Oracle iStore displays cart-level tax only. Cart-level tax display includes the following, applicable to a specific cart:

- Tax codes (tax printable name)
- Tax rate
- Taxation amounts

11.1.17.2 Item-Level Tax Display

If enabled, item-level taxes applicable to the item are displayed below every item in the shopping cart.

To display item-level taxes, map the logical template, **STORE_CART_LINE_TAX**, to the JSP page, **ibeCScdShowCartLineTax.jsp**, which is provided by Oracle iStore. Map the template for the stores in which you wish to display item-level taxes.

To map the template, see [Section D.1.7, "Setting up Template Store-Language Mappings"](#).

11.1.17.3 Displaying Amounts for More than One Tax Code

Some countries charge more than one tax (for example: VAT, local tax, provincial tax, etc.). In such cases, Oracle iStore will display the applicable amounts for each tax code at the cart level. If item-level tax display is enabled, the applicable amounts for each tax code for the item are displayed.

11.1.18 Shopping Cart Expiration Values

Two profile options control the number of days that active and saved carts are available to users before they expire. Expired carts are no longer accessible to users. The expiration date gets reset every time the cart is updated by the user.

When you change the value of the expiration profile options, existing saved carts are not affected.

Shopping cart expiration dates are shown on the **Your Shopping Cart** and **My Carts** pages.

1. To set the expiration for *active* carts, set the following profile option at the application level to iStore:
 - **IBE: Active Cart Expiration Duration (# days)** --- Enter the number of days that active shopping carts are available before expiration. The expiration date is calculated from the last updated date of the cart.

The default value of this profile option is **30** (days).

2. To set the expiration for *saved* carts, set the following profile option at the application level to iStore:
 - **IBE: Saved Cart Expiration Duration** --- Enter the number of days that saved shopping carts are maintained and available before expiration. The expiration date is calculated from the last updated date of the cart.

The default value of this profile option is **90** (days).

11.1.19 Merging Duplicate Items in Cart

You can enable Oracle iStore to merge lines on an order if the items are identical. In this case, Oracle iStore increases the quantity by one for each identical item merged.

This ability is controlled by setting the following profile option:

- **IBE: Merge Shopping Cart Lines** -- 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. When this occurs, the quantity is increase appropriately.

Caution: If you set the profile option to **Yes**, you must set the profile option **IBE: Use Line Level Shipping** to **No**. You cannot enable shopping cart line merging and line splitting simultaneously. For more information on Line Level Shipping, see [Section 10.10.3, "Allowing Item-Level Shipping Methods"](#).

The profile option defaults to **No** if not set.

11.1.20 Decimal Quantities for Cart Items

When adding an item or updating quantity in the Oracle iStore shopping cart, the customer can enter a decimal quantity if the item is divisible. Oracle iStore 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 unit of measure (UOM).

To prevent the customer from selecting a decimal quantity of an item, follow this procedure.

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. This will be the organization defined in the profile option, IBE: 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**.

11.2 Shopping Cart Sharing

This section contains topics related to shopping cart sharing for Oracle iStore's Customer UI.

Topics include:

- [Section 11.2.1, "Cart Sharing Overview"](#)
- [Section 11.2.2, "Shared Cart Behavior"](#)

- [Section 11.2.3, "Shared Cart Access Levels"](#)
- [Section 11.2.4, "B2B Shared Cart Retrieval Process"](#)
- [Section 11.2.5, "B2C Shared Cart Retrieval Process"](#)
- [Section 11.2.6, "Quote Sharing"](#)
- [Section 11.2.7, "Setting the Cart Sharing Profile Option"](#)
- [Section 11.2.8, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#)

11.2.1 Cart Sharing Overview

Oracle iStore's shopping cart sharing functionality allows multiple users to shop and purchase products collaboratively, utilizing the same shopping cart. Cart sharing has the following main features:

- **Collaborative purchasing** --- All Customer UI registered users -- both B2B and B2C users -- can share shopping carts with any number of other iStore users. This enables multiple users to make changes to a shopping cart (depending upon access levels). The updates can be seen in real-time by other users sharing the cart. The cart owner or a recipient with Full access can then place an order with the cart.
- **Available to B2B and B2C users** --- The functionality is available to both B2B and B2C users, with the following rules:
 - B2B users are only allowed to share carts with other registered users within their organization who use the same account number.
 - B2C users can share carts with any other user who has a valid e-mail address. Recipients must be registered Oracle iStore users, however, to update the shared cart.
- **E-mails keep participants informed of activity** --- Several Oracle iStore notification event e-mails keep participants informed about shared cart actions. For example, when the owner stops sharing a cart or an order is placed with a shared cart, all recipients are notified by e-mail that the cart is no longer available. The e-mails are sent automatically to the participants, through integration with Oracle Workflow. See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), for a list of and details about these notification events.
- **Shared cart roles** --- The user who shares a cart with other users is the cart *owner*. Only the cart owner can stop sharing a cart or set access levels for the other members. Users who are receiving the shared carts are called cart

recipients; the actions they can perform as a recipient are controlled by access levels set by the owner.

- **Available for all cart types and statuses** --- Carts can be in active or saved status to be shared. A cart can be shared in the checkout pages as well.
- **Shared cart access levels** --- The actions that a recipient can perform with a shared cart depend upon the access level given by the owner of the cart. These access levels can be updated at any time by the owner. See [Section 11.2.3, "Shared Cart Access Levels"](#), for more information.
- **Flexibility** --- At any time, the cart owner can delete the cart, add/remove recipients, or place the order. Recipients are automatically notified when a shared cart is deleted or when the owner has stopped sharing the cart.

See [Section 11.2.2, "Shared Cart Behavior"](#), for additional information.

11.2.2 Shared Cart Behavior

The following points describe shared cart behavior:

- If a user has a cart with items in it before signing in, and after sign-in --- if the last active cart was a shared cart --- then the shared cart will become de-active and the user will continue to have the unsaved cart as the active cart.
- For B2B users, only other store users within their organization and using the same account can be the recipients of a shared cart.
- B2C users can share with anyone who has a valid e-mail address. These users do not need to be registered Oracle iStore users to receive the notification e-mail and view the cart, but will need to register to update the cart in any way.
- In order to update a shared cart, all users involved in the sharing must be registered Oracle iStore users.
- Where a registered B2B user does not have an e-mail address in the system, the cart owner can specify an ad hoc e-mail address for the recipient at the time the cart sharing is initiated. This ad hoc e-mail address will be used to send an e-mail to the user, but it will not be entered into the personal information section for the recipient. This allows the recipient to know that a cart has been shared with him, and allows the recipient to add the desired e-mail address in the Personal Information area within the **Profile** menu.
- Field-level validations are done on e-mail addresses entered. When entering e-mail addresses, users should use standard e-mail format.

- When searching for recipients, B2B users can use the % sign as a wildcard. There is no search mechanism for B2C users.
- Cart retrieval by B2C users is always done using the URL in the e-mail notification message, or by entering the unique cart retrieval number in the **My Carts** page within the **Cart** menu. For B2C users, the cart retrieval textbox always appears in this page.
- Cart retrieval by B2B users is always done via the URL in the e-mail notification message, or by accessing the *Carts Shared With You* area of the **My Carts** page within the **Cart** menu. For B2B users, the merchant also can enable the optional cart retrieval number textbox on this page. See [Section 11.2.8, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#), for details.
- For backward compatibility with the **Sharee Number** of previous Oracle iStore releases, a profile option (**IBE: Cart Retrieval By Number For B2B**) can be set to enable B2B users of previous releases to use a Sharee Number. This allows the B2B recipient to enter the Sharee Number from a notification and retrieve the cart. See [Section 11.2.8, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#), for details.
- Recipients of a shared cart cannot request Sales Assistance.
- Recipients of a shared cart can review but not reject Terms and Conditions
- All the recipients get e-mail messages with details of the shared cart. The e-mail notifications leverage Oracle iStore's integration with Oracle Workflow. See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), for more information.
- Recipients cannot share the cart with anyone else.
- Cart pricing will always be done based on the sold to customer who is the owner of the cart.
- Share cart expiration behaves the same way as any saved cart. See [Section 11.1.18, "Shopping Cart Expiration Values"](#).
- If a shared cart is active, user can click on **Save Cart** and the shared cart will become de-active. A new cart will be created for the user when an item is added.
- Multiple recipients can activate and work on a shared cart simultaneously. Changes made to the shared cart are immediately visible to the owner and all recipients.
- Recipients cannot delete a cart shared with them.

11.2.3 Shared Cart Access Levels

The following are the B2B and B2C user access levels that control which actions a recipient can perform with a shared cart:

- **Full** --- Recipients can update/activate and checkout/place an order with the cart, as well as remove access to the cart.
- **Update** --- Recipients can activate the cart and update, but cannot place an order. They can remove their cart access using the **Remove Cart Access** button.
- **Read-only** --- Recipients can view but not activate the cart. They can remove their cart access by pressing the **Remove Cart Access** button. No checkout is allowed.

The names and descriptions of these seeded values can be changed. See [Section 14.4, "Modifying Oracle Application Object Library Lookups"](#), for details.

11.2.4 B2B Shared Cart Retrieval Process

For B2B users in the Customer UI, the following is a typical process flow for retrieving a shared cart:

1. The B2B user retrieves a shared cart via one of the following methods:
 - a. Recipient selects the URL hyperlink in the shared cart e-mail notification message. The **Shared Cart Details** page appears for the user, without requiring him to sign in. The user must sign in, however, to update or check out with the cart.
 - b. Recipient accesses the **My Carts** page within the **Cart** menu in the Customer UI. The *Carts Shared With You* area of the **My Carts** page shows all carts being shared with the user. The user selects the hyperlink of the cart name to retrieve the **Shared Cart Details** page. A user also can select the **Retrieve Saved/Shared Carts** link in the Welcome bin -- this retrieves the **My Carts** page, where the user can retrieve the cart.

To see an example of the **My Carts** page for B2B users, see [Section 11.1.5, "Viewing a List of Saved/Shared Carts"](#).

2. Depending on their access levels --- see [Section 11.2.3, "Shared Cart Access Levels"](#) --- recipients can perform the following actions once they have accessed the **Shared Cart Details** page:
 - a. **View Cart Details** --- All recipients can see cart details, including items, amounts, and shipping/billing information. Note that sensitive credit card information will not display (only the last four digits of a card display).

- b. **Remove Cart Access** --- When a user presses the **Remove Cart Access** button in the **Shared Cart Details** page, the system sends the owner an e-mail telling him that the recipient is finished working with the cart. The cart disappears from the *Carts Shared With You* list in the recipient's **My Carts** page. Recipients of all access levels can utilize the Remove Cart Access button to signal that they are finished updating the cart.
- c. **Checkout/Place Order** --- A user with Update access level can use the **Checkout** button to check out with the cart, and a user with Full access level can place the order with the shared cart. The checkout action activates the cart. The following rules apply to the checkout/place order action:
 - Even if a user has Full access level, he also must have the seeded user permission, **IBE_CREATE_ORDER**, to place the order. This permission is seeded in the Business User Role, Primary User Role, and Reseller User Role. See [Section 12.3.4, "Seeded Oracle iStore User Permissions Descriptions"](#), for more information.
 - Recipients of a shared cart cannot Request Sales Assistance or Reject Terms and Conditions. They can review the Terms and Conditions.
 - If a B2B recipient views the cart by clicking on the link in the e-mail notification, and then signs in to update/checkout with the cart, Oracle iStore will check if the account number of the owner of the cart and the account number of the signed-in user (recipient) are identical. If the account numbers are not identical, i.e., the owner and recipient do not work with the same account number, an error message will tell the user that access to the shared cart is not permitted.
- d. **Update Cart** --- For users with Full and Update access levels, when the **Update Cart** button is pressed, the shared cart becomes active and the user can add/modify/delete items.

The figure below shows the **Shared Cart Details** page for B2B recipients.

Figure 11–12 Shared Cart Details Page - B2B Recipients

Shared Cart Details: Christmas list

Click on 'Remove Cart Access' button to remove this cart from the list of carts shared to you. Cart owner will be notified of this change via email. [Remove Cart Access](#) [Checkout](#)

Recipients

List of recipients with whom this cart is shared

Name	Email	Access Level
Tim Smith	tim.smith@oraclevad.com	Full
Jim Tyler	jim.tyler@oraclevad.com	Update
Mary Allen	mary.allen@oraclevad.com	Read Only

Cart Information [Update Cart](#)

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
					Sub-Total: \$3,376.28 Tax: \$0.00 Shipping & Handling: \$14.95	
					Total: \$3,391.23	

Customer Information

Customer: Oracle Corp. Tim Smith (408)234-5678 tsmith@oracle.com	Agreement: B2B Contract: 12345

Shipping Information	Billing and Payment Information
Ship to: Tim Smith Oracle Corp.	Bill to: Tim Smith Oracle Corp.

3. The cart owner can perform the following actions after the cart has been shared:
 - a. **Stop Sharing** --- When the owner presses the **Stop Sharing** button, all recipients are notified via e-mail that the cart sharing has ended and that the cart will no longer be accessible. The cart disappears from the list of shared carts for all recipients and the owner; the cart becomes a saved cart for the owner.
 - b. **Checkout** --- When the owner presses the **Checkout** button, the cart becomes active and the owner can check out and place the order.

Note: A user must have the seeded user permission, **IBE_CREATE_ORDER**, to place the order. This permission is seeded in Business User Role, Primary User Role, and Reseller User Role. See [Section 12.3.4, "Seeded Oracle iStore User Permissions Descriptions"](#), for more information.

- c. **Update Cart** --- When the owner presses the **Update Cart** button, the cart becomes active and he can add/modify/delete items.
 - d. **Delete Cart** --- After the owner presses the **Delete** button and confirms the delete action, the **My Carts** page displays with a confirmation message. All recipients of the shared cart will get an e-mail notifying them that the cart is no longer available.
 - e. **Modify Recipients and their Access Levels** --- The owner can add/delete recipients and modify their access levels. A notification e-mail is sent to recipients for whom the access level has been changed. No changes to cart status are made in this action. See [Section 11.2.3, "Shared Cart Access Levels"](#), for a list of access levels.
- 4. If the cart owner requests sales assistance, the cart becomes a quote. Oracle iStore sets all recipients' access levels to **Read Only**, and the recipients receive e-mail notification of this change. See [Section 11.3.4, "Requesting Sales Assistance During Checkout"](#), for more information on this functionality.
 - 5. If the recipient places the order, both the owner and recipient receive the order confirmation e-mail notification. All other recipients receive notification that they cannot access the cart any longer.
 - 6. If the recipient places the order, he will be able to track the order.
The owner also will be able to track the order, provided:
 - The profile option, **IBE: Use Auth Permissions in Order Tracker**, is **off**; or
 - The profile option is **on** and the owner has **IBE_VIEW_ORDER** permission in his user role.

See [Section 11.5.2, "Enabling Permission Checking in Order Tracker"](#), for more information.

The figure below shows the **Shared Cart Details** page for B2B owners.

Figure 11–13 Shared Cart Details Page - B2B Owners

Shared Cart Details: Christmas list

Click on 'Stop Sharing' button if you don't want to share the cart with recipients anymore.
Delete Cart
Stop Sharing
Checkout

Recipients

List of recipients for the cart. You can add/modify/remove recipients at any time.
Add/Modify Recipient

Name	Email	Access Level
Tim Smith	tim.smith@oraclevad.com	Full
Jim Tyler	jim.tyler@oraclevad.com	Update
Deborah Smith	deb.smith@oraclevad.com	Read Only

Cart Information
Update Cart

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
					Sub-Total: \$3,376.28 Tax: \$0.00 Shipping & Handling: \$14.95	
					Total: \$3,391.23	

Customer Information

Customer: Oracle Corp.
Tim Smith
(408)234-5678
tsmith@oracle.com
Agreement: B2B
Contract: 12345

Shipping Information

Ship To: Tim Smith

Billing and Payment Information

Bill To: Tim Smith

11.2.4.1 Shared Cart Modification Rules for B2B Users

The following table, Shared Cart Modification Rules for B2B Users, describes the modification activities and behavior for B2B users with shared carts.

Table 11–1 Shared Cart Modification Rules for B2B Users

Cart Attribute	Modification Rule
Sold to customer and contact	Since a cart can only be shared within the organization, the sold to customer will never change. The sold to contact for a shared cart will always be the cart owner, even if a recipient places a shared cart as order
Cart items	Items can be added based on availability in the specialty store.
Cart Pricing	Prices are based on the sold to customer
Promotion codes	During checkout, promotion codes are validated against the sold to customer.
Pricing agreements	During checkout, pricing agreements are validated against the sold to customer.
Payment Information	During checkout, recipients can specify payment information from the payment book available to them. Payment information entered by recipients will not be linked/copied to the cart owner

11.2.5 B2C Shared Cart Retrieval Process

B2C users can share a cart with any other B2C user with a valid e-mail address. A cart can be shared with multiple recipients with Full, Update or Read Only access. The following is a typical process flow for shared cart functionality with B2C users.

1. User retrieves a shared cart via one of the following methods:
 - a. A shared cart e-mail recipient clicks on the URL hyperlink in the e-mail message. The **Shared Cart Details** page appears, without requiring user sign-in. The user must sign in, however, to update or check out with the cart. Recipients do not need to be registered users to be able to view the cart. But if the user tries to activate the cart, then sign-in/registration is enforced.
 - b. In the **My Carts** page, the recipient enters the cart retrieval number in the the Cart Retrieval Number textbox. When a user shares a cart, a unique cart retrieval number is generated for each recipient.

The owner can see the cart retrieval number in the Share Cart Confirmation page which appears to the cart owner after a cart has been shared. This number also appears in the owner’s *Carts Shared By You* area in the **My Carts** page.

To see an example of the **My Carts** page for B2C users, see [Section 11.1.5, "Viewing a List of Saved/Shared Carts"](#).

2. Depending upon their access levels, the B2C shared cart recipients can do the following in the **Shared Cart Details** page:
 - a. **View Cart Details** --- Shared cart recipients of all access levels will see the cart details, such as items in the cart, amounts, and shipping/billing information. Note that sensitive credit card information will not display (only the last four digits of a card display).
 - b. **Remove Cart Access** --- When a recipient presses the **Remove Cart Access** button in the **Shared Cart Details** page, Oracle iStore sends the owner a notification e-mail. The cart disappears from the recipient's **My Carts** page. Users of all access levels utilize the Remove Cart Access button to signal that they are finished updating the cart.
 - c. **Update Cart** --- Users with Update and Full access levels can press the **Update Cart** button to activate the cart and modify it. Users with Update access level can activate and modify the cart -- and can provide shipping and billing information -- but cannot place it as an order.
 - d. **Checkout/Place Order** --- A user with Update access level can use the **Checkout** button to check out, and a user with Full access level can place the order. This action activates the cart. Note that recipients cannot Request Sales Assistance or Reject Terms and Conditions.

The figure below shows the **Shared Cart Details** page for B2C recipients.

Figure 11–14 Shared Cart Details Page - B2C Recipients

Shared Cart Details: Christmas list

Click on 'Remove Cart Access' button to remove this cart from the list of carts shared to you. Cart owner will be notified of this change via email.

Remove Cart Access

Checkout

Recipients

List of recipients with whom this cart is shared

Name	Email	Access Level
Tim Smith	tim.smith@oraclevad.com	Full
Jim Tyler	jim.tyler@oraclevad.com	Update
Mary Allen	mary.allen@oraclevad.com	Read Only

Cart Information

Update Cart

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
					Sub-Total: \$3,376.28 Tax: \$0.00 Shipping & Handling: \$14.95	
					Total: \$3,391.23	

Customer Information

Customer: Oracle Corp.
Tim Smith
(408)234-5678
tsmith@oracle.com

Contract: 12345

Shipping Information

Ship To: Tim Smith
500 Oracle Park Way
Redwood City, CA 94063

Billing and Payment Information

Bill To: Tim Smith
500 Oracle Park Way
Redwood City, CA 94063

3. The cart owner can do the following after the cart has been shared:

a. **Stop Sharing** --- When the owner presses the **Stop Sharing** button, the cart moves to de-active state and all recipients are notified via e-mail that the cart sharing has ended. The cart disappears from the list of shared carts for all recipients and the owner, and it becomes a saved cart for the owner.

b. **Checkout** --- When the owner presses the **Checkout** button, the cart becomes active and the owner can check out and place the order.

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- c. **Update Cart** --- When the owner presses the **Update Cart** button, the cart becomes active and he can add/modify/delete items.
 - d. **Delete Cart** --- After the owner presses the **Delete** button and confirms the delete action, the **My Carts** page displays with a confirmation message. All recipients of the shared cart will get an e-mail notifying them that the cart is no longer available.
 - e. **Modify Recipients and their Access Levels** --- The owner can add/delete recipients and modify access levels of the recipients. A notification e-mail is sent to recipients for whom the access level has been changed. No changes to cart status are made in this action. See [Section 11.2.3, "Shared Cart Access Levels"](#), for a list of access levels.
- 4. For B2C users, only the **owner** of the cart can track the order from Order Tracker. B2C recipients cannot track orders from shared carts.
 - 5. If the recipient places the order, both the owner and recipient receive the order confirmation e-mail notification message. All other recipients receive notification that they cannot access the cart any longer.
 - 6. If the owner requests Sales Assistance or rejects Terms and Conditions during checkout, Oracle iStore sets the access levels of all recipients to Read-Only.

The figure below shows the **Shared Cart Details** page for B2C owners.

Figure 11–15 Shared Cart Details Page - B2C Owners

Shared Cart Details: Christmas list

Click on 'Stop Sharing' button if you don't want to share this cart anymore.

Delete Cart

Stop Sharing

Checkout

Recipients

List of recipients for the cart. You can add/modify/remove recipients at any time.

Add/Modify Recipient

Name	Email	Access Level	Retrieval Number
Tim Smith	tim.smith@oraclevad.com	Full	2AWE254
Jim Tyler	jim.tyler@oraclevad.com	Update	2ATE387
Mary Allen	mary.allen@oraclevad.com	Read Only	2AQR208

Cart Information

Update Cart

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
					Sub-Total: \$3,376.28 Tax: \$0.00 Shipping & Handling: \$14.95	
					Total: \$3,391.23	

Customer Information

Customer: Tim Smith
(408)234-5678
tsmith@oracle.com

Contract: 12345

Shipping Information	Billing and Payment Information
Ship To: Tim Smith 500 Oracle Park Way REDWOOD SHORES, CA 94404	Bill To: Tim Smith 500 Oracle Park Way REDWOOD SHORES, CA 94404

11.2.5.1 Shared Cart Modification Rules for B2C Users

The following table, Shared Cart Modification Rules for B2C Users, describes the modification rules and behavior for B2C users with shared carts.

Table 11–2 Shared Cart Modification Rules for B2C Users

Cart Attribute	Modification Rule
Sold to customer	Sold to customer is always the person who shared the cart with others, even if a recipient places a shared cart as an order.
Cart items	Items can be added based on availability in the specialty store.
Cart pricing	Cart prices are based on sold to customer.
Promotion codes	Promotion codes are validated against the sold to customer.
Payment information	Recipients and owners can specify payment information from the payment book available to them. Payment information entered by recipients will not be linked/copied to the cart owner.

11.2.6 Quote Sharing

Quotes are available in the Customer UI under the **My Quotes** subtab within the **Cart** menu. The **My Quotes** summary page lists all of a user's quotes, including shared quotes. Quotes can originate from shopping carts that become quotes when the user presses the **Need Salesrep Assistance** button in the **Checkout: Review and Place Order** page, or they can be quotes published through the quote publishing feature of Oracle Quoting.

Note: Quote sharing functionality requires integration with Oracle Quoting. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for details.

To share a quote, both B2B and B2C users press the **Share Quote** button from the **Quote Details** page. After the Share Quote button is pressed, the quote sharing process for the owner is identical to cart sharing. See [Section 11.2.2, "Shared Cart Behavior"](#), for more details.

For retrieval of a shared quote, the B2B user actions are identical to the shared cart retrieval action; see [Section 11.2.4, "B2B Shared Cart Retrieval Process"](#), for this flow. For B2C users, shared quote retrieval also is identical to B2C shared cart retrieval -- for recipients, shared quotes do not appear in a list on the **My Quotes** page. Instead, the user must enter a quote retrieval number to access the quote, or use the URL in the notification e-mail. See [Section 11.2.5, "B2C Shared Cart Retrieval Process"](#), for more details.

11.2.6.1 Shared Quote Behavior

Quotes have the same behavior as shopping carts in terms of recipient rules. However, quotes **always are read-only** in terms of cart information --- the owner can change **only payment information**. Also note the following:

- Quotes never can be made active in the way a shopping cart can. Thus, when a user accesses a quote in the Customer UI, this never change the existing **cart** status.
- For quotes, Update access means the recipient also can update payment information. Full access means the recipient can place the order.

In the **My Quotes** page, quotes are organized by type, with the most recently created quote appearing first in its section.

Note: The **My Quotes** page is different for B2C and B2B users.

The main sections on the **My Quotes** page are:

- **Quotes** --- This area displays quotes that have been published to the user through Oracle Quoting integration. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for more information on this functionality.
- **Shared Quotes** --- This section contains a user's shared quotes, separated by type:
 - **Quotes Shared By You** --- This area displays quotes being shared by the user with another user. Both B2C and B2B users will see this section.
 - **Quotes Shared With You** --- A section with this label exists only for B2B users. It lists quotes that another user is sharing with the user.
 - **Quote Retrieval Textbox** --- Instead of a *Quotes Shared With You* section, B2C users will see a quote retrieval textbox. By entering in the box the unique quote retrieval number, B2C users can retrieve a shared quote.

B2B and B2C users will see different versions of the **My Quotes** page, as shown in the following two figures.

Figure 11–16 My Quotes Page - B2B Users

My Quotes

Published Quotes

List of quotes that you have created. Click on an quote name to view the details.

Quote Name	Quote Number	Expiration Date	Orderable
Fast Forward	174045294	11-SEP-2002	Yes
CRM In 90 Days	174045295	12-SEP-2002	No

Shared Quotes

Quotes Shared With You

List of quotes that have been shared with you. Click on an quote name to view the details.

Quote Name	Quote Number	Expiration Date	Created Date	Owner	Access Level	Orderable
eCommerce Suite	174045291	23-SEP-2002	23-OCT-2002	Sanjay Narang	Full	Yes
ERP Upgrade	274045221	02-OCT-2002	02-NOV-2002	Inderpreet Wadhwa	Read Only	No
Hosting	334045291	11-DEC-2002	11-JAN-2003	Ron Huddleston	Update	Yes
SFA Solution	174045291	24-DEC-2002	24-JAN-2003	Ron Huddleston	Read Only	No

Quotes Shared By You

List of quotes that you have shared. Click on an quote name to view the details.

Quote Name	Quote Number	Expiration Date	Orderable
SFA Solution test	174045294	11-SEP-2002	Yes
ERP In 30 Days	174045295	12-SEP-2002	Yes

The quote names are hyperlinks with which the user can access the **Quote Details** and **Shared Quote Details** pages. In the case of B2C customers, users must enter the unique quote retrieval number in the **My Quotes** page to retrieve the **Shared Quote Details** page.

Figure 11–17 My Quotes Page - B2C Users

My Quotes

Published Quotes

List of quotes that you have created. Click on an quote name to view the details.

Quote Name	Quote Number	Expiration Date	Orderable
Fast Forward	174045294	11-SEP-2002	Yes
CRM In 90 Days	174045295	12-SEP-2002	No

Shared Quotes

Retrieve Shared Quote

Enter quote retrieval number and click 'Retrieve'.

Quotes Shared By You

List of quotes that you have shared. Click on an quote name to view the details.

Quote Name	Quote Number	Expiration Date	Orderable
SFA Solution test	174045294	11-SEP-2002	Yes
ERP In 30 Days	174045295	12-SEP-2002	Yes

11.2.6.2 Shared Quote Owner Actions

The owner of the shared quote can access the **Quote Details** page by selecting the hyperlink of the quote name in the **My Quotes** page, in the *Quotes Shared By You* section. In addition to viewing quote details, the quote owner can perform the following actions on the shared quote:

1. **Stop Sharing** --- The quote owner can press the **Stop Sharing** button to end the quote sharing. The owner will see a confirmation message in the UI, and all of the recipients will receive an e-mail that they can no longer access the quote. For B2B recipients, the quote disappears from the *Quotes Shared With You* area of the **My Quotes** page. For the owner, the quote disappears from the list of published quotes.
2. **Checkout/Place Order** -- The quote owner can check out with the quote and place it as an order.
3. **Modify Recipients and Access Levels** --- The quote owner can add/modify the recipients and their access levels. Recipients receive an e-mail notification about the changes.

The following figure shows an example of the owner's **Shared Quote Details** page.

Figure 11–18 Shared Quote Details Page - Owners

Quote Details: Fast Forward (174045294)						
Click on 'Stop Sharing' button if you don't want to share the quote with recipients anymore.					Stop Sharing Checkout	
Recipients						
Add/Modify Recipient						
Name	Email	Access Level				
Tim Smith	tim.smith@oraclevad.com	Full				
Jim Tyler	jim.tyler@oraclevad.com	Update				
Mary Allen	mary.allen@oraclevad.com	Read Only				
Cart Information						
Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
Sub-Total:					\$3,376.28	
Tax:					\$0.00	
Shipping & Handling:					\$14.95	
Total:					\$3,391.23	
Customer Information						
Customer: Oracle Corp. Tim Smith (408)234-5678 tsmith@oracle.com			Agreement: B2B Contract: 12345			
Shipping Information			Billing and Payment Information			
Ship to: Tim Smith Oracle Corp. 500 Oracle Park Way			Bill to: Tim Smith Oracle Corp. 500 Oracle Park Way			

11.2.6.3 Shared Quote Recipient Actions

Shared quote retrieval is different for B2B and B2C recipients:

- B2B quote recipients** can access the **Shared Quote Details** page by selecting the hyperlink of the quote name in the **My Quotes** page, in the *Quotes Shared With You* section, or they can use the hyperlink provided in the shared quote notification e-mail. For backward compatibility, you may wish to set a profile option which enables a textbox on this page for entry of Sharee Numbers of

previous iStore releases -- see [Section 11.2.8, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#), for details.

- **B2C quote recipients** can access the **Shared Quote Details** page by entering the quote retrieval number into the quote retrieval textbox on the **My Quotes** page. This quote retrieval number is provided in the shared quote notification e-mail. B2C users also can access the shared quote by selecting the hyperlink in the notification e-mail.

In addition to viewing quote details, quote recipients can perform the following actions on the shared quote:

1. **Remove Quote Access** --- Users with Update and Full access levels will see the **Remove Quote Access** button in the **Quote Details** page. Pressing this button signals that the user is done updating the quote. After this button is pressed, the owner receives an e-mail notification that the recipient is done with the quote. The quote disappears from the list of quotes for the recipient.
2. **Checkout/Place Order** --- A recipient with Full or Update access levels can use the **Checkout** button to check out, and a user with Full access level can place the order. Pressing the Checkout button does not change the active cart of the user.

The following figure shows an example of the recipient's **Shared Quote Details** page.

Figure 11–19 Shared Quote Details Page - Recipients

Quote Details: Fast Forward (174045294)

Click on 'Remove Quote Access' button to remove this cart from the list of quotes shared to you. Quote owner will be notified of this change via email.

[Remove Quote Access](#) [Checkout](#)

Recipients

Name	Email	Access Level
Tim Smith	tim.smith@oraclevad.com	Full
Jim Tyler	jim.tyler@oraclevad.com	Update
Mary Allen	mary.allen@oraclevad.com	Read Only

Cart Information

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	Vision Pad DX - Mobile Computer	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
					Sub-Total: \$3,376.28	
					Tax: \$0.00	
					Shipping & Handling: \$14.95	
					Total: \$3,391.23	

Customer Information

Customer: Oracle Corp. Tim Smith (408) 234-5678 tsmith@oracle.com	Agreement: B2B Contract: 12345

Shipping Information

Ship to: Tim Smith
Oracle Corp.
500 Oracle Park Way
REDWOOD SHORES, CA 94404
UNITED STATES

Billing and Payment Information

Bill to: Tim Smith
Oracle Corp.
500 Oracle Park Way
REDWOOD SHORES, CA 94404
UNITED STATES

11.2.7 Setting the Cart Sharing Profile Option

To enable shopping cart sharing, set the following profile option:

- **IBE: Use Share Cart Functionality** --- This profile option specifies whether cart sharing is enabled in your specialty stores. Set to **Yes** to enable the functionality. Set to **No** to disable the functionality.

Set this profile option to the customer responsibility which maps to the applicable specialty store. You also can set it at site or application level. This profile option defaults to **No** if not set.

11.2.8 Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option

For backward compatibility with the **Sharee Number** of previous Oracle iStore releases, you can set the following profile option to **Yes** to enable the Cart Retrieval Number textbox in the **My Carts** and **My Quotes** pages:

- **IBE: Cart Retrieval By Number For B2B** --- For B2B users, this profile option enables a textbox (labelled Cart Retrieval Number) in the **My Carts** and **My Quotes** pages. B2B users can enter a Sharee Number from previous iStore releases to access carts previously shared.

Set this profile option to the customer responsibility which maps to the applicable specialty store. You also can set it at site or application level. The default value is **No**.

Note that this profile does **not** control the cart retrieval textbox for B2C users.

11.3 Checkout and Order Placement

Oracle iStore ships with full checkout and order placement capabilities in the Customer UI. This section discusses configurations for the checkout/order placement functionality.

Note: Some of the functionality in this section discussed requires integration with Oracle iStore dependencies and assumes you have performed the required setup tasks. For more information, see:

- [Chapter 2, "Before You Begin" \(Section 2.2.2, "Mandatory Dependency Implementation Steps"\)](#)
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#)
- [Chapter 9, "Implementing Pricing"](#)
- [Chapter 10, "Implementing Payment Types and Shipping Methods"](#)

Topics include:

- [Section 11.3.1, "Checkout/Order Placement Process Flow"](#)
- [Section 11.3.2, "Shopping Cart Defaulting"](#)
- [Section 11.3.3, "Deleted \(Invalidated\) Addresses in Shopping Carts"](#)

- [Section 11.3.4, "Requesting Sales Assistance During Checkout"](#)
- [Section 11.3.5, "Rejecting Terms and Conditions During Checkout"](#)
- [Section 11.3.6, "Mandating B2B Contact Information During Checkout"](#)
- [Section 11.3.7, "How Account Sites Are Generated with Orders"](#)
- [Section 11.3.8, "Express Checkout"](#)
- [Section 11.3.9, "Using Flexfields in Checkout Page"](#)

11.3.1 Checkout/Order Placement Process Flow

The following is the process flow for the Customer UI checkout phase:

1. The user presses the **Checkout** button from either the **Saved (or Shared) Cart Details** page or the **Your Shopping Cart** page. The **Checkout: Shipping Information** page displays.
2. In the **Checkout: Shipping Information** page, the user can perform the following shipping actions:
 - a. **Select a shipping method** --- If shipping methods have been implemented and assigned to the store, the user can select from available shipping methods using the **Shipping Method** drop-list. See [Chapter 10, "Implementing Payment Types and Shipping Methods"](#), and [Chapter 4, "Implementation Tasks for Oracle iStore"](#), for setup information.
 - b. **Select a shipping address** --- B2C users select from a drop-list of existing addresses. B2B users will see **Change** buttons to change customer, contact, and address -- if they have the required permissions in their user roles. See [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).
 - c. **Enter shipping instructions** --- If this functionality has been enabled, the user can enter Requested Delivery Date, Shipping Instructions, and Packing Instructions. See [Section 10.10.4, "Allowing Users to Enter Shipping Information"](#), for setup information.
 - d. **Enter item-level shipping** --- If this functionality is enabled, the user can enter separate shipping information for different items in the cart. See [Section 10.10.3, "Allowing Item-Level Shipping Methods"](#), for setup information.
3. After entering shipping information, the user selects the **Continue Checkout** button. The **Checkout: Payment and Billing Information** page displays.
4. In the **Checkout: Payment and Billing Information** page, the user can:

- a. **Select payment type** --- In the *Payment Information* area, select from a list of available payment types, such as Credit Card, Invoice, etc. See [Chapter 10, "Implementing Payment Types and Shipping Methods"](#), and [Chapter 4, "Implementation Tasks for Oracle iStore"](#), for setup information.

If Commitments have been set up, the user can select the **Use Commitment** button to select commitments and their related Agreements. See [Section 9.10, "Pricing Agreements"](#), for more information.
 - b. **Select billing contacts and addresses** --- B2C users select from a drop-list of existing addresses. B2B users will see **Change** buttons to change customer, contact, and address -- if they have the required permissions in their user roles. See [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).
 - c. **Enter tax information** --- In the *Tax Information* area, select whether the order is taxable. If the order is not taxable, the user must select a reason from the **Reason Code** drop-list. A **Tax Certification** textbox in this area allows the user to enter a non-taxable certification number.
 - d. **Enter item-level billing information** --- If this functionality is enabled, the B2B user can enter separate billing information for different items in the cart. See [Section 10.8, "Setting up Item-Level Billing"](#), for setup information.
5. After entering billing information, the user selects the **Continue Checkout** button. The **Checkout: Review and Place Order** page appears.
6. The **Checkout: Review and Place Order** page shows the user's cart items, cart totals, and shipping/billing information. From this page, the user can:
 - a. **Review Terms and Conditions** --- The user can select the **review terms and conditions** hyperlink to review the terms and conditions of the standard contract (set up through Oracle Sales Contracts). See [Section 11.3.5, "Rejecting Terms and Conditions During Checkout"](#), and [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#), for more information.
 - b. **Request sales representative assistance** --- The user can select the **Need Salesrep Assistance** button to launch the **How can we assist you in finalizing your order?** page. In this page the user enters some basic information and submits the form. See [Section 11.3.4, "Requesting Sales Assistance During Checkout"](#), and [Chapter 13, "Implementing Customer Assistance"](#), for more information about the sales assistance feature and flows.
 - c. **Change quantities of items** --- The user can change the quantity of an item by entering new values in the **Quantity** textboxes.

- d. **Recalculate** --- The user can press the **Recalculate** button to recalculate the total amounts in the cart -- this is useful if, for example, after changing item quantity.
- e. **Change shipping/billing information** --- In the **Review and Place Order** page, both B2C and B2C users will see **Change** buttons which they can use to return to the shipping and billing pages to select or enter new information.
- f. **Place the order** --- The user can select the **Place Order** button to place the order. The **Confirmation** page is displayed, showing the unique order number, the items in the order, and total amounts. In this page, a **Continue Shopping** button is available for the user as well -- this allows the user to navigate back to the catalog pages.

See [Section 11.4, "Orders Business Flow"](#), for the post-order-placement flow.

11.3.2 Shopping Cart Defaulting

In the Oracle iStore Customer UI, as the user goes through the checkout process, Oracle iStore defaults certain information into the users' checkout pages. This information includes shipping and billing information related to the user.

Shopping cart defaulting both improves the performance of the checkout flow, and improves the defaulting capabilities of Oracle iStore. The feature defaults in the shipping addresses, billing addresses, primary credit card, and preferred shipping method of the user when the user adds the first item to the cart.

The following are the triggers that activate cart defaulting:

- A signed-in user creates a cart by adding an item to it
- A guest user has items in an active cart and then signs in

11.3.2.1 Defaulting for Shipping Data

The following shipping fields are populated when shipping information defaulting occurs:

- **Shipping Method** --- If the user has a preferred shipping method and has a primary shipping address, then the preferred shipping method is defaulted into the cart. If the user does not have a preferred shipping method, then it can be set by the user in the *Preferences* area within the **Profile** menu. The preferred shipping method also is set when a user who does not have a preferred shipping method checks out with his first cart and chooses a shipping method. This shipping method then becomes the user's preferred shipping method. In

all cases, the existing validation of shipping methods per store, and those applicable for the current organization, will be done.

- **Ship to Customer** --- In a B2C case, the logged in person is always the default ship-to customer. In a B2B case, the organization of the logged-in user is the default ship-to customer.
- **Ship to Contact** --- In both B2C and B2B cases, the logged in user is the default ship to contact.
- **Ship to Address** --- If the user already has a default (preferred) shipping address, Oracle iStore will use that address as the default shipping address for the cart, provided the user also has a preferred shipping method. Otherwise, the user can create a new address in the checkout process. The address used in the first order placed by the user becomes the default ship-to address, and will be defaulted the next time.

11.3.2.2 Defaulting for Billing Data

The following billing fields are populated when billing information defaulting occurs:

- **Bill to Customer** --- In a B2C case, the logged in person is always the default bill-to customer. In a B2B case, the organization of the logged-in user is the default bill-to customer.
- **Bill to Contact** --- In both B2C and B2B cases, the logged in user is the default bill to contact.
- **Bill to Address** --- If the user already has a default (preferred) billing address in the address book, Oracle iStore will use that address. Otherwise, the user can create a new address during the checkout process. The bill-to address used in the first order placed by the user becomes default bill-to address, and will be defaulted the next time.
- **Payment Method** --- If the user has a default credit card and the merchant has set up that credit card type as a valid form of payment in the specialty store the user is in, then the default credit card is defaulted into the cart as the payment option when the user adds the first item to a new cart.

If this defaulting does not take place, then New Credit Card is displayed as the payment option on the billing and payment checkout page. If credit card is not enabled by the merchant as a payment type, then Invoice, Cash and Check (in this order) will be chosen, depending on which payment types have been enabled by the merchant. If the user does not have a default credit card in his profile and creates a new credit card, the new credit card is used in the checkout

process and becomes the default credit card; this card then will be defaulted the next time.

11.3.3 Deleted (Invalidated) Addresses in Shopping Carts

Once a B2B or B2C user places a shipping or billing address into his shopping cart, Oracle iStore will keep these addresses in the cart even if these addresses get deleted (invalidated) before the user checks out with the cart. This ensures that users never are allowed to checkout without addresses in their shopping carts.

This rule applies to:

- B2C billing and shipping addresses
- B2B contact person billing and shipping addresses
- B2B party site addresses
- Addresses in shared shopping carts
- Addresses deleted through the user's Address Book (within the Profile menu)
- Addresses deleted through the Express Checkout preferences menu
- Addresses invalidated through Oracle Forms

The following shopping cart checkout flow examples illustrate the rule:

Standard Checkout:

1. A user add items to the cart and proceeds to checkout.
2. The user picks a shipping and a billing address to use in the cart.
3. The user switches to the Profile menu's Address Book and deletes the shipping and/or billing address used for the cart.
4. The user returns to checkout with the same cart -- the shipping and/or billing address continue to appear in the shipping and billing section cart-level settings.

Checkout with a Shared Cart:

1. A user adds items to the cart.
2. The user proceeds to checkout and shares the cart with another recipient.
3. The user picks a shipping and a billing address to use in the cart.
4. The user switches to the **Profile** menu's Address Book and deletes the shipping and/or billing address, and then logs out.

5. Recipient of the shared cart retrieves the cart and checks out with it -- the shipping and/or billing addresses continue to appear in the shipping and billing section cart-level settings.

Express Checkout:

1. A uUser enters shipping and billing address information in Express Checkout Preferences page.
2. The user places items in his shopping cart for automatic retrieval by the concurrent program.
3. The user goes to the **Express Checkout Preferences** page and deletes his express checkout billing and/or shipping address.
4. Express Checkout concurrent program submits the order with the previously-deleted shipping and/or billing addresses.

11.3.4 Requesting Sales Assistance During Checkout

If a user requests sales assistance in the checkout phase, the cart becomes a quote and the user's sales representative receives an e-mail notification of the request.

This functionality requires that both Oracle Quoting and the Sales Assistance feature have been implemented. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), and [Section 13.2, "Setting up Sales Assistance"](#), for more information.

11.3.5 Rejecting Terms and Conditions During Checkout

If a user rejects the standard Terms and Conditions in the checkout phase, the cart follows one of two paths, depending upon the value of the profile option, **IBE: Reject Terms and Conditions**.

- **Quoting** --- If the profile is set to **Quoting**, then the cart becomes a quote and appears on the **My Quotes** page, *Quotes* list.

This requires that Oracle Quoting has been implemented. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.

- **Contracts** --- If the profile is set to **Contracts**, then the cart appears in the **My Carts** page, *Saved* carts list. The contract number will display in the **Saved Cart Details** page.

Oracle Sales Contracts integration must be complete for this to occur. See [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#), for more information about the Contracts flow.

11.3.6 Mandating B2B Contact Information During Checkout

Merchants have the ability to mandate whether B2B users must enter ship to and bill to contact information during checkout. Oracle iStore APIs validate this information against database tables used by Oracle Receivables.

This functionality is enabled by setting the following profile option at the application level for iStore:

- **IBE: Mandate Contacts For Billing and Shipping** --- Enter **Yes** to mandate that B2B users enter contact information before an order will be submitted. Enter **No** to disable the mandate.

This profile option defaults to No if not set.

A warning message is displayed if the user attempts to continue without providing the required information. The user cannot continue without providing the required information.

Note: B2B users must have the permission, IBE_CHANGE_BILLTO_CONTACT and IBE_CHANGE_SHIPTO_CONTACT, in their user role in order for them to be able to change ship to and bill to contact information.

11.3.7 How Account Sites Are Generated with Orders

At order creation, Order Capture (iStore's backend API layer) will create a valid account site use for the given party site and account number, if none exists. During this process, if the Oracle Receivables (AR) system parameter `auto_site_numbering` is No, then the location field when creating an account site use will be concatenated with the site use code, city, and account site use id. If the AR system parameter `auto_site_numbering` is Yes, then Order Capture APIs (which Oracle iStore uses to pass information to AR) will not populate the field, but instead will let AR generate the value for the Location field (to be the same as the account site use id).

11.3.8 Express Checkout

Available for all registered users, Express Checkout allows orders to be submitted as batch jobs by using a concurrent program, **iStore - Express Checkout Order Submission**. In addition to the concurrent program, the functionality is enabled by setting two profile options.

Topics in this section include:

- [Section 11.3.8.1, "Express Checkout Process Flow"](#)
- [Section 11.3.8.2, "Setting Express Checkout Profile Options"](#).

See [Section B.4.1, "iStore - Express Checkout Order Submission"](#), for more information on the concurrent program.

Note: If you are integrating Oracle iStore with Oracle9iAS Web Cache, and you are using the web cache to cache your catalog pages, you should not use Express Checkout in your specialty stores for the following reason:

If you set up Oracle9iAS Web Cache to cache your catalog pages and the Express Checkout profile is on at the application level: then, if User 1 has Express Checkout turned on, while User 2 has Express Checkout turned off, User 2 may still be able to see the Express Checkout button in the UI. When User 2 clicks on the cached Express Checkout button, he will receive an error.

11.3.8.1 Express Checkout Process Flow

Following is the process flow for Express Checkout:

1. In Oracle Forms, an administrator sets the profile options discussed in [Section 11.3.8.2, "Setting Express Checkout Profile Options"](#).
2. In the Oracle iStore Customer UI, the Express Checkout preferences link appears in the **Welcome** bin, and the **Express Checkout Preferences** page is available through the **Profile** menu.
3. Oracle iStore user sets up Express Checkout preferences.
 - a. User enters a valid credit card number and contact information in Express Checkout Preferences page, and selects the **Save Settings** button.
 - b. The system checks for valid addresses and credit card information before saving the settings. An error message is returned if the user has entered invalid information.
4. User enables Express Checkout by selecting the **Turn on Express Checkout** button in the **Express Checkout Preferences** page.
5. Once the user preferences are set up and Express Checkout is enabled, to purchase items through Express Checkout, the user does the following:
 - a. Selects the **Express Checkout** button that appears next to products in the specialty store catalog pages. This adds the item to the Express Checkout queue.

Note: Express Checkout does not apply to bundle items that have been enabled in Oracle Bills of Material; hence, the Express Checkout button will not appear next to these items.

- b. Select the **Express Checkout** button in the **Your Shopping Cart** page. This adds all items in the cart to the Express Checkout queue.

Note that any time a user changes Express Checkout preferences, subsequent Express Checkout items will be added to a new queue. For example, if a user selects Express Checkout, changes Express Checkout preferences, and then selects Express Checkout again, the items submitted after he changed preferences will be entered into a separate Express Checkout order.

6. The store then forwards the user to the **Pending Express Checkout Orders** page where he can cancel the order if desired. If he does nothing, the concurrent program will pick up the order and submit it.
7. The concurrent program, [iStore - Express Checkout Order Submission](#), automatically picks up the Express Checkout queue and submits the orders.

11.3.8.2 Setting Express Checkout Profile Options

To use Express Checkout in your web stores, set the following profile options at the application level to iStore.

- **IBE: Use Express Checkout** --- This profile option enables the Express Checkout functionality in all of your stores. Set to **Yes** to enable Express Checkout, or set to **No** to disable the functionality.

The default value for this profile option is **Yes**.

- **IBE: Express Checkout Consolidation Time Interval** --- This profile option determines the amount of time that an Express Checkout order will remain available to be "added to" before the concurrent program can submit it. The concurrent request, iStore - Express Checkout Order Submission, attempts to submit Express Checkout orders based upon its schedule, e.g., how often the concurrent request is set to be run (every *n* hours, every day, etc.).

Enter values for this profile option in *minutes*. The default value for this profile option is **60** (minutes).

See [Section B.4.1, "iStore - Express Checkout Order Submission"](#) for more information on the concurrent program.

11.3.9 Using Flexfields in Checkout Page

Oracle iStore allows the addition of descriptive flexfields (DFFs) to the Payment And Billing Information page (checkout page), and saves the information they contain to the cart/quote in Oracle Quoting. It passes the contents of the flexfields on to Oracle Order Management as well. 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.

Note: Descriptive flexfield support in iStore is only meant for storing additional information in the form of comments in non-validated fields. Only **global** segments of a flexfield are supported. Also, at this time only header level DFFs are supported in the checkout page, not line-level DFFs.

Specify flexfields at the checkout page using the following procedure.

Steps

1. Log in to Oracle Forms with the **Application Developer** responsibility.
2. Choose **Flexfield > Descriptive > Segments** to open the Descriptive Flexfields Segments window.
3. Choose **View > Find**, and query for the flexfield with:
Application: Oracle Order Capture
Title: Header: Additional Information
4. Uncheck the **Freeze Flexfield Definition** checkbox (to allow for changes to the flexfield definition).
5. Set up flexfield segments: Select **Segments** and then map each segment you wish to use to a column, specified by the names `ATTRIBUTE1` through `ATTRIBUTE15`. This column data (attributes 1-15) corresponds to columns with the same name in the `ASO_QUOTE_HEADERS_ALL` table.
Example: Map "Sales Rep Email" to "ATTRIBUTE1."
See *Oracle Applications Flexfields Guide* for additional details.
6. 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.
- 7. Test your checkout page using the following steps:
 - a. Check out 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, check if the Sales Rep Email flexfield information is present in Oracle Order Management.
- 8. Customize the prompts for the flexfields, if desired.

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.

See [Section 14.2, "Modifying Text Messages"](#) in [Chapter 14, "Implementing Messages and Prompts"](#), for instructions.

11.4 Orders Business Flow

The orders flow is as follows

1. An order is placed in a web store when the user selects the **Place Order** button.
2. If the order uses standard checkout, Oracle Order Capture APIs send order data to Oracle Order Management.
 - *Booked* orders are ready to move to the next stage in the order process (for example, shipping).
 - *Entered* orders must then move to the Booked stage before completion.

If the order is placed using Express Checkout, the iStore Express Checkout Order Submission concurrent program loads the order data into the Oracle Order Management tables.

- See [Section 11.3.8, "Express Checkout"](#), for details.
- 3. The order is then processed through OM, Oracle Shipping, and Oracle Receivables.

4. Users can view the order details --- including shipping, invoice, and payment information --- using the Order Tracker functionality in the web stores.
 - See [Section 11.5, "Order Tracking"](#), for details on Order Tracker.
 - For more information, see the following documentation available on [Oracle MetaLink](#).
 - *Oracle Order Management Suite Implementation Manual* for additional information on how orders are processed in Order Management
 - *Order Capture API Reference Guide* for information on APIs that send and retrieve orders information
 - Oracle Financials documentation for more information on Oracle Receivables

11.5 Order Tracking

Once an order is submitted in an Oracle iStore web store, customers can log into the web store and access their order details (including invoices, payments, and shipping details) in Order Tracker, if the administrator has enabled this functionality. This section contains information about enabling Order Tracker in your web stores.

Note: Information on **order cancellation** functionality is in its own section: [Section 11.6, "Order Cancellation"](#).

Topics in this section include:

- [Section 11.5.1, "Order Tracker Overview"](#)
- [Section 11.5.2, "Enabling Permission Checking in Order Tracker"](#)
- [Section 11.5.3, "Setting Number of Invoice/Order Lines to Display"](#)
- [Section 11.5.4, "Disabling Invoice Details in Order Tracker"](#)
- [Section 11.5.5, "Disabling Payments Details in Order Tracker"](#)
- [Section 11.5.6, "Providing Shipping Details in Order Tracker"](#)
- [Section 11.5.7, "Order Tracker User Hook for Shipping Lines"](#)

11.5.1 Order Tracker Overview

In the Customer UI, Order Tracker is available to registered users through the **Orders** button.

The Order Tracker menu includes the following subtabs:

- **Track Orders subtab** -- The Track Orders page contains search screens and a list of submitted orders. B2B users will see all orders submitted by their organization.

By selecting the **Order Number** hyperlink, users can access the **Order Details** page, which will display:

- Reference numbers for the order, including order number, reference number, and web confirmation number
 - Purchase Order number, if applicable
 - Date ordered
 - Date booked
 - Part numbers and names of products ordered
 - Quantities ordered
 - Unit selling prices of products ordered
 - Units of measure for products ordered
 - Monetary totals by line item
 - Order Status, including line-level status of the order lines (entered, booked, cancelled, closed, etc.)
 - Scheduled Ship date
 - Promise Date
 - Links to shipping details
- **Pending Express Checkout subtab** -- If Express Checkout is enabled, users will see the details of their express checkout orders.
See [Section 11.3.8, "Express Checkout"](#), for more details.
 - **Invoices subtab** --- If enabled, in the Invoices page, users can search for invoices by Invoice Date, Invoice Number, PO Number, and Invoice Type. Results are returned in table format.
 - **Payments subtab** --- If enabled, in the Payments page, users can search for payments by Payment Number, Customer Name, Receipt Date, Payment Type, and Payment Amount. Results are returned in table format.

11.5.2 Enabling Permission Checking in Order Tracker

You can control whether Oracle iStore checks user permissions in the Order Tracker pages, through the use of the following profile option:

- **IBE: Use Auth Permissions in Order Tracker** --- This profile option determines whether iStore checks that a B2B user has the following permissions:
 - **IBE_VIEW_INVOICE**
 - **IBE_VIEW_ORDER**
 - **IBE_VIEW_PAYMENT**

when attempting to view invoices/orders/payments in Order Tracker. These three permissions in the user's role determine whether or not the B2B user can view invoices/orders/payments details for the user's entire organization.

If the profile option is set to **Yes**, iStore checks whether B2B users have these permissions in their roles, and users **without** the permissions **cannot** see invoices/orders/payments across the organization; only the user's own data will display.

If set to **No**, no permission checking is performed on these three permissions, and all B2B users will be able to see orders across the organization.

The profile option defaults to **No** if not set.

11.5.3 Setting Number of Invoice/Order Lines to Display

The number of rows to display in Order Tracker when users view their orders, invoice, or payment data is controlled by setting the following profile option at the application level to iStore:

- **IBE: Number of Invoice/Order Lines displayed** --- This profile option specifies the number of rows to display in the page table when a user views invoice, order, and payment information in Order Tracker. Enter a numerical value for the number of rows to display. For example, to display 25 lines, enter **25** in the value field.

If not set, the profile option defaults to 10.

11.5.4 Disabling Invoice Details in Order Tracker

By default, an **Invoices** link displays in the Customer UI in Order Tracker. The link can be disabled, however, by setting the following profile option at the application level for Oracle iStore:

- **IBE: Enable Invoices in Order Tracker** --- This profile option specifies whether the Invoices link is displayed in the third level menu of Order Tracker. Set to **Yes** to display the link, or **No** to disable the link.

The profile option defaults to Yes if not set.

11.5.5 Disabling Payments Details in Order Tracker

By default, a **Payments** link displays in the Customer UI in Order Tracker. The link can be disabled, however, by setting the following profile option:

- **IBE: Enable Payments in Order Tracker** --- This profile option specifies whether the Payments link is displayed in the third level menu of Order Tracker. Set to **Yes** to display the link, or **No** to disable the link.

The profile option defaults to Yes if not set.

11.5.6 Providing Shipping Details in Order Tracker

In the Order Tracker pages in the Customer UI, both B2B and B2C users can view shipping information for their orders, provided the related shipping functionality has been implemented.

To view shipping information for an order, the user navigates to **Orders > Track Orders** and selects the order number hyperlink of the order he wishes to track. Shipping details are shown in the **Order Detail** page. The shipment detail is based on the database view, IBE_SHIP_DETAIL_V, rendered into the Java layer by the region, IBE_SHP_DTL.

To enable you to extend shipping details, Oracle iStore provides a customizable user hook. See [Section 11.5.7, "Order Tracker User Hook for Shipping Lines"](#), below, for details.

11.5.7 Order Tracker User Hook for Shipping Lines

By implementing a region item in the **Shipment Details** page within Order Tracker, you can enable an extra column in the page which links to an additional processing page. Both pages are Oracle iStore Display Templates -- one is a detail template and one is a processing template. For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

In the processing template, you can insert custom logic to fulfill your organization's business requirements. For example, in the processing page you could provide

additional shipment tracking mechanisms, such as a link to a carrier web site where users could track the shipment of their purchases.

Following are the implementation steps:

- [Enable Region Item in Shipment Details Page](#)
- [Customize Shipping Details Processing JSP](#)

11.5.7.1 Enable Region Item in Shipment Details Page

The region item, **IBE_SD_ADDITIONAL**, is **disabled** by default. After the region is enabled, a column, labelled **Details**, is automatically shown with a icon on the **Shipment Details** page.

Following are the steps to enable the region item:

Steps

1. Log in to Oracle Forms with **System Administrator** responsibility.
2. Choose **Application Developer Common Modules**.
3. From Navigator, choose **Define Regions**.
4. From the Region ID field, query for **IBE_SHP_DTL_R**.
5. Go to **Region Items**.
6. Scroll through the list and locate **IBE_SD_ADDITIONAL**.
7. Check **Node Display** to enable the region item. (Uncheck to disable.)
8. Save the changes.
9. Bounce the middle tier.

11.5.7.2 Customize Shipping Details Processing JSP

Next, customize the **Shipping Details Custom Processing** page with your own business logic.

Following are the details about this page and the main Shipping Details page:

Shipping Details Custom Processing Page:

The physical file for this page is an empty page, allowing you to provide your own content. The mapped physical file and Display Template information for the **Shipping Details Custom Processing** page are:

- **Physical file** --- ibeCOtpShpDtlCustom.jsp

- **Programmatic Access Name** --- STORE_SHIP_DETAIL_CUSTOM_P

Shipping Details Page:

The mapped physical file and Display Template information for the **Shipping Details** page are:

- **Physical file** --- ibeCOtdShpDtl.jsp
- **Programmatic Access Name** --- STORE_PSI_SHIPMENT_DETAIL_D

Programmatically, the Shipping Details page table is constructed in a loop iterating through all region items. Each column is essentially a region item. Inside this loop, the URL to the Shipping Details custom processing page template is constructed. You can pass additional information to the destination by appending parameters to the URL (detailsURL). For example, you could provide information such as tracking numbers and shipping carriers. Such information can simply be stored in a variable to be used later.

For example:

```

        else if (itemName.equals("IBE_SD_ADDITIONAL"))
        {
            String tplName = "STORE_SHIP_DETAIL_CUSTOM_P";
// You can append parameters to detailsURL to pass additional information
// to the processing page.
            String detailsURL =
                DisplayManager.getTemplate(tplName).getFileName();
            %>
            <td class="tableDataCell" valign="top" align="left">
                <a href="<%= detailsURL %>">
                    
                </a>
            </td>
            <%
        }

```

For sample code, see the Shipping Details Custom Processing page physical file (ibeCOtpShpDtlCustom.jsp). The sample code shows how to retrieve the parameter and process it. At the end of the page, the code simply redirects to Order Tracker; however, you can customize it to redirect to any page you want.

11.6 Order Cancellation

Oracle iStore allows B2B and B2C users to cancel orders if the orders are in Booked or Entered status in Oracle Order Management. The cancel order feature is enabled

by setting a profile option and ensuring that your B2B users have the appropriate permissions in their user roles. This section includes:

- [Section 11.6.1, "Setting the Cancel Order Profile Option"](#)
- [Section 11.6.2, "Setting Cancel Order Permissions"](#)
- [Section 11.6.3, "Order Cancellation Process Flow"](#)

11.6.1 Setting the Cancel Order Profile Option

To enable the cancel order feature, set the following profile option at the application or responsibility level:

- **IBE: Enable Order Cancellation in Order Tracker** --- This profile option specifies whether registered users (B2B and B2C) can cancel their orders in OT. If the profile option is set to **Yes**, users can cancel their orders. If the profile option is set to **No**, users cannot cancel orders.

The profile option defaults to **No** at the application level not set. There is no default value at the responsibility level.

11.6.2 Setting Cancel Order Permissions

Out-of-the-box, the cancel order functionality is enabled for B2C users, after you have set the profile option discussed in the previous section.

For B2B users, the following is the permission that enables the functionality:

- **IBE_CANCEL_ORDER**

This permission is seeded for the roles:

- **IBE_PRIMARY_USER_ROLE**
- **IBE_BUSINESS_USER_ROLE**

Note: If you wish to enable Cancel Order for B2B users who were created before the 11.5.8 release, you must manually add the **IBE_CANCEL_ORDER** permission to the role. You can add permissions to roles either through the Oracle CRM Technology Foundation System Administration Console (login to the JTF login as sysadmin) or through the Oracle iStore User Management pages.

- More information can be found in [Section 12.3.2, "Setting Roles for Oracle iStore B2B Users"](#).

11.6.2.1 Allowing B2B Users to Cancel Organization Orders

Oracle iStore ships with functionality that allows B2B users to view all orders for their organization, but **modify** only (including cancelling) orders that *they have placed*.

To enable B2B users to cancel orders for their organizations, assign their role the permission:

- **IBE_CANCEL_ORGANIZATION_ORDER**

You can use the Oracle CRM Technology Foundation System Administration Console to modify user roles. The sysadmin console is available by logging into the Oracle E-Business Suite HTML login (JTF login) as sysadmin and navigating to the Users screens.

- For more information on the Sysadmin Console, see *Oracle CRM Technology Foundation Implementation Guide* and *Oracle CRM Technology Foundation Concepts and Procedures*.

11.6.3 Order Cancellation Process Flow

The process flow for order cancellation is as follows:

1. Oracle iStore manager sets the profile option, **IBE: Enable Order Cancellation**, to **Yes** at the application level for iStore, and bounces the Apache server.
2. User accesses the Order Summary or Order Details pages, and initiates the order cancellation process by selecting the **Cancel Order** button.

Users who have enabled Express Checkout will be able to cancel Express Checkout orders before they are submitted to Order Management.

- See [Section 11.3.8.1, "Express Checkout Process Flow"](#), for details.

Note: The Cancel Order button displays in the Customer UI only if the profile option has been set to **Yes** and the order is **cancellable** (in Entered or Booked status).

3. Once a user initiates the cancellation request, the system checks to see if the order is cancellable. If it is, the user is taken to the **Order Cancellation** page.

If the order is not cancellable, the cancellation process is aborted and a message is presented to the user which informs him that the order is not cancellable online and to contact his sales representative.

The programmatic access name of the message is IBE_PSI_ORDER_CANCEL_FAILED.

4. In the Order Cancellation page, the user is prompted to select a Cancellation Reason from a drop-list. The Java API, `Order.getCancellationReason()` provides this list.

The programmatic access name of the message is `IBE_PSI_ORDER_CANCEL_HINT`. The programmatic access name for the text beside the reasons list is: `IBE_PRMT_REASON`. See [Chapter 14, "Implementing Messages and Prompts"](#), for more information on messages in the Customer UI.

5. Once the cancellation request is submitted and accepted, a confirmation message displays on the UI.
6. Oracle iStore Alert Workflow **Cancel Order** sends an e-mail to the user confirming that the order has been cancelled.

For more information, see:

- [Section 31.2.2, "Oracle iStore Seeded Notifications"](#)
- [Section 7.7, "Setting up Section Display Templates Text Messages"](#)

11.7 Oracle iStore and Party/Account Merge

Party Merge and Account Merge functionalities are part of the Data Quality Management tools provided by Trading Community Architecture (TCA). They allow you to identify and resolve duplicates present in the Trading Community registry. Different applications throughout the Oracle E-Business Suite have data associated with both Parties and Customer accounts. Any references to Party and Accounts should be updated when Parties or Accounts are merged. This ensures data integrity across the Oracle E-Business Suite.

This section discusses Oracle iStore's behavior with TCA's concurrent programs which effect Party/Account Merge operations.

For more information on the TCA functionality discussed in this section, visit [Oracle MetaLink](#); use keywords: TCA, Trading Community Architecture.

This section includes the following main topics:

- [Section 11.7.1, "Party/Account Merge Overview"](#)
- [Section 11.7.2, "Oracle iStore's Behavior with Party/Account Merge"](#)
- [Section 11.7.3, "Best Practice: Run Account Merge after Party Merge"](#)
- [Section 11.7.4, "Oracle iStore Foreign Keys Used in Party/Account Merge"](#)

11.7.1 Party/Account Merge Overview

Party Merge and Account Merge are TCA utilities which merge or transfer party and account data in the trading partner database. There are important differences between the two operations, as discussed in the following sections:

- [Section 11.7.1.1, "Party Merge"](#)
- [Section 11.7.1.2, "Customer Account Merge"](#)

11.7.1.1 Party Merge

Party Merge eliminates duplicate data in the registry layer in order to keep the trading partner database accurate and clean. It consolidates duplicate parties after they have been entered in the system. The merging enables users to have a single view of each party.

Party Merge can merge information for:

- **Parties** --- Merge duplicate parties
- **Party sites** --- Merge duplicate party sites for a party; for example, merge duplicated manufacturing locations of a party
- **Party relationships** --- Related child entities are merged, such as party relationships, contact information, party profiles, customer accounts and information obtained from third-party sources

There are two types of operations performed by Party Merge:

- **Merge** --- Inactivates an entity and transfers its dependent entities
- **Transfer** --- Moves an entity from one parent to another, if a duplicate does not exist

Example:

ABC Company has implemented the Oracle E-Business Suite

While checking the quality of its data, ABC Company determines that duplicate records exist for a party, Vision Corporation. Data for this party were entered into the database under the names Vision Corp. and Vision Inc. Using the Party Merge utility, ABC Company plans to merge the two Vision parties -- Vision Corp. and Vision Inc.

Party Merge will:

1. **Inactivate** the Vision Corp. party record

2. Either **merge** or **transfer** the details of Vision Corp., e.g., transfer or merge party sites: 500 Oracle Pkwy. and 600 Vision Pkwy.
3. **Transfer** party site 500 Vision Pkwy. to Vision Inc.

11.7.1.2 Customer Account Merge

Customer Account Merge is a tool that merges transactions from one customer account to another customer account. The merging or transferring of these duplicate records allows the consolidation of customer account transactions --- such as orders, invoices and payments --- into one customer account relationship.

11.7.2 Oracle iStore's Behavior with Party/Account Merge

Oracle iStore supports and treats Party / Account Merge in various ways, as discussed in the following sections:

- [Section 11.7.2.1, "Shopping Lists"](#)
- [Section 11.7.2.2, "Express Checkout Preferences"](#)
- [Section 11.7.2.3, "Store Access Restrictions"](#)
- [Section 11.7.2.4, "Shared Carts"](#)
- [Section 11.7.2.5, "Active, Default-Named, and System-Saved Carts"](#)

In Party / Account Merge operations, Oracle iStore's access to party data is accomplished through foreign keys on the data. These are summarized in [Section 11.7.4, "Oracle iStore Foreign Keys Used in Party / Account Merge"](#).

11.7.2.1 Shopping Lists

Account Merge updates both the party and account IDs of the merge-from party to point to the merge-to party. Thus, merge-to party, after the account merge, will see additional shopping lists from the merge-from party.

In addition, with Party or Account Merge:

- Merge-to users will have access to the same shopping lists as before the merge.
- New shopping lists are created during the transfer.
- If more than one shopping lists exists for a user, these will **not** be merged into a single list.

The Oracle iStore foreign key to the party and account layer for shopping lists data is IBE_SH_SHP_LISTS_ALL.

11.7.2.2 Express Checkout Preferences

In a Party Merge, Express Checkout preferences do not change in the merge-to party.

The Oracle iStore foreign key to the party layer for Express Checkout is IBE_ORD_ONECLICK_ALL.

11.7.2.3 Store Access Restrictions

In a Party Merge, merge-to settings override merge-from settings for access restrictions. The following table, Store Access Restrictions - Expected Behavior After Party Merge, shows the expected behavior of these preferences after Party Merge.

Table 11–3 Store Access Restrictions - Expected Behavior After Party Merge

Preference	Merge-from	Merge-to	Expected Behavior
No restriction	On or Off	On or Off	Merge-to settings take priority and are not changed.
Only the following organizations can access the store	On	On	Additional organizations are added to the merge-to list from the merge-from list.
Only the following organizations can access the store	Off	On	Merge-to settings take priority and are left On.
Only the following organizations can access the store	On or Off	Off	Merge-to settings take priority and are left Off.
The following organizations cannot access the store	On	On	Additional organizations are added to the merge-to list from the merge-from list.
The following organizations cannot access the store	Off	On	Merge-to settings take priority and are left On.
The following organizations cannot access the store	On or Off	Off	Merge-to setting take priority and are left Off.

The Oracle iStore foreign key to the party layer when dealing with minisite access is: IBE_MSITE_PRTY_ACCSS.

11.7.2.4 Shared Carts

In Party Merge, Oracle iStore shared carts have the following rules:

- Shared carts in the merge-from party are transferred to the merge-to party

- If parties have the same cart, then the merge-from cart is ignored (deleted)

In Account Merge, Oracle iStore shared carts follow these rules:

- Account ID and Party ID of the merge-from party will be changed to that of the merge-to party
- A duplicate row is defined as having identical party_id, account_id and quote_header_id

The Oracle iStore foreign key to the party layer for shared carts is IBE_SH_QUOTE_ACCESS.

11.7.2.5 Active, Default-Named, and System-Saved Carts

In Party or Account Merge, the following is the behavior for active, default-named, and system-saved carts:

Note: Default-named and system-saved carts are carts that are named by the system. See [Section 11.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.

- **Active carts** --- No changes are made to any active cart items or names in the merge-to party or account.
- **System-saved carts** --- System-saved carts, whose default name is "**Store Saved**", are not altered in any way in the merge-to party or account.
- **Default-named carts** --- These carts, whose default name is "**Store**", are renamed to the default name for system-saved carts ("**Store Saved**") in the merge-to party or account.

The Oracle iStore foreign key to the party layer for active carts is IBE_ACTIVE_QUOTES_ALL.

11.7.3 Best Practice: Run Account Merge after Party Merge

By running Party Merge without Account Merge there is the possibility for a party to have two accounts. To avoid multiple accounts to one party, it is recommended to run Account Merge after Party Merge.

See the following for examples on how the accounts are treated in the two scenarios:

- [Section 11.7.3.1, "Party Merge Only Scenario"](#)
- [Section 11.7.3.2, "Run Party Merge Then Account Merge Scenario"](#)

11.7.3.1 Party Merge Only Scenario

In the scenario where only Party Merge is run, the following table, Account Numbers in Party Merge Only Scenario, shows what should be expected:

Table 11–4 Account Numbers in Party Merge Only Scenario

Merge	Party ID	Account ID
Before Party Merge		
To	1000	2000
From	1100	1800
After Party Merge		
To	1000	2000
		1800

Party ID 1000 will have two accounts. At login, the system will pick the account **created first**. In the example above, account 1800 (from system) will be used at login.

11.7.3.2 Run Party Merge Then Account Merge Scenario

In the scenario where Account Merge is run **immediately after** Party Merge, the following table, Account Numbers in Account Merge After Party Merge Scenario, shows what should be expected:

Table 11–5 Account Numbers in Account Merge After Party Merge Scenario

Merge	Party ID	Account ID
Before Party Merge and Account Merge		
To	1000	2000
From	1000	1800
After Party Merge and Account Merge		
To	1000	2000 (1800 merged)

11.7.4 Oracle iStore Foreign Keys Used in Party/Account Merge

The following table, Oracle iStore Foreign Keys Used in Party / Account Merge, shows the foreign keys used in Party / Account Merge.

Table 11–6 Oracle iStore Foreign Keys Used in Party/Account Merge

Entity Name	Description
IBE_SH_SHP_LISTS_ALL	Shopping lists
IBE_ORD_ONECLICK_ALL	Express Checkout preferences
IBE_MSITE_PRTY_ACCSS	Store access restrictions
IBE_SH_QUOTE_ACCESS	Shared carts
IBE_ACTIVE_QUOTES_ALL	Active carts

For more information on the TCA functionality discussed in this section, visit [Oracle MetaLink](#); use keywords: TCA, Trading Community Architecture.

Implementing Users and Registration

This chapter contains information on implementing and maintaining user management and store registration functionality in Oracle iStore 11*i*.

Note: This chapter assumes you have performed the mandatory setups listed in the following chapters:

- [Chapter 2, "Before You Begin"](#)
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#)

Topics include:

- [Overview of Oracle iStore Users](#)
- [User Registration](#)
- [User Security and Access](#)
- [Oracle iStore User Management Pages](#)
- [Setting up Self-Service Login Assistance](#)

12.1 Overview of Oracle iStore Users

In addition to the administrative users described in [Section 4.1.2, "Set up Administrators"](#), Oracle iStore also supports the following customer user types:

- Business-to-business (B2B) users
- Business-to-consumer (B2C) users
- B2B Primary users
- B2B Reseller users

Note: Access to the web stores is controlled through the use of *responsibilities* and -- in the case of B2B users -- by associating *roles* with the users. If you are unfamiliar with the Oracle Applications concepts of responsibilities and roles, then you can read about them in this chapter ([Section 12.3, "User Security and Access"](#)) and in the *Oracle CRM Technology Foundation Concepts and Procedures* User Management documentation available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

This section contains:

- [Section 12.1.1, "Guest Users"](#)
- [Section 12.1.2, "Registered B2C Users"](#)
- [Section 12.1.3, "Registered B2B Users"](#)
- [Section 12.1.4, "Primary Users"](#)
- [Section 12.1.5, "Reseller Users"](#)

12.1.1 Guest Users

Guest users (also called *walk-in* users) can browse web store catalogs and create shopping carts. However, they **cannot**:

- Set up a user profile
- Save a shopping cart
- Share a shopping cart
- Create a shopping list
- Submit an order
- Search or view order details

Walk-in users who visit your web stores are 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 different guest users cannot see each other's changes.

- See [Section 4.3.1, "Set up Guest User Access"](#), for details on how to define the guest user account.

12.1.2 Registered B2C Users

Registered business-to-consumer (B2C) users are individual customers not associated with an organization. By default, when they register in a web store, they are immediately approved.

12.1.2.1 Setting the Use B2C Profile Option

You can control whether or not B2C users are allowed to register in your specialty stores by setting the profile option, **IBE: Use Business to Customer Features**. To use B2C functionality in your web stores, set to **Yes** at iStore application level. If the profile is set to **No**, then B2C users cannot register. The profile option's default value is **Yes**.

Unlike B2B users, for B2C users, out-of-the box you cannot:

- Assign roles
- Use any approval mechanisms - B2C users always are approved automatically

After B2C users register, they have full permissions in the web stores, including the ability to:

- Place orders
- Cancel orders
- View order details in Order Tracker
- Retrieve published Quotes in the Cart menu pages
- Save and share carts
- Request sales representative assistance

12.1.3 Registered B2B Users

Registered business-to-business (B2B) users represent customer organizations whose information is stored in Oracle Trading Community Architecture. Typically, when B2B users self-register, they enter an organization number created when the first user from that organization registered.

All B2B user information is stored in the Oracle Trading Community Architecture (TCA) schema. See [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) for more information.

12.1.3.1 Setting the B2B Registration Approval Profile Option

You can control whether new B2B users require approval before accessing the web stores. The profile option, **IBE: Use Business User Auto Approval**, controls this functionality. Set this at the application level to iStore. If this profile option is set to **Yes**, then B2B users are automatically approved; if set to **No**, then the users must be explicitly approved.

Note: If the profile option, **IBE: Use Business User Auto Approval**, is set to **Yes**, the **Organization Number** textbox on the Business User Registration page (ibeCAcpRegistration.jsp) will **not** appear.

If you are using the Oracle CRM User Management module, then this iStore profile option overrides any B2B approval settings you have defined in the CRM User Management pages.

12.1.3.2 Explicitly Approving B2B Users

If you have set up B2B registration to require approval, then these users must be explicitly approved. There are two ways to approve these users in the HTML applications:

- The system administrator can approve them in the user management module using Oracle CRM Technology Foundation sysadmin console. See the *Oracle CRM Technology Foundation Concepts and Procedures* (User Management chapter) for more information.
- The iStore Primary User can approve them by assigning them roles and accounts in the iStore User Management pages. See [Section 12.4, "Oracle iStore User Management Pages"](#), for details. Note that Primary Users can view and approve only those users who are registered within their organization, as specified by organization ID.

12.1.3.3 Setting the Use B2B Features Profile Option

The profile option, **IBE: Use B2B Features**, specifies whether B2B users are supported in your stores. Set this at the application level to iStore. Set to **Yes** to use B2B functionality; set to **No** to disable. The default value is **Yes**.

Where to Find More Information

- See [Section 12.3.2, "Setting Roles for Oracle iStore B2B Users"](#) for information on the default roles that B2B users receive when they register.
- A list of permissions associated with the B2B roles can be found in [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).

- See [Section 12.2.4, "Self-Registration Steps for B2B Users"](#), for steps B2B users can use to self-register.
- See [Section 12.1.3.2, "Explicitly Approving B2B Users"](#), for steps Primary Users can use to approve B2B users who have self-registered.
- See [Appendix F, "Customer UI Process Flows"](#), for a B2B user page flows.

12.1.4 Primary Users

Primary Users are B2B users who are responsible for creating and managing other users within their organizations. Typically, the first user who registers in Oracle iStore is considered the Primary User. When the first user from an organization registers in Oracle iStore, the company is assigned an organization ID in Oracle TCA. Subsequent users who register then can use this organization ID when registering, provided that B2B auto-approval is turned **off** (see [Section 12.1.3.1, "Setting the B2B Registration Approval Profile Option"](#)).

Included in the default Primary User role are the administrative permissions, **IBE_USER_ADMIN** and **IBE_ROLE_ADMIN**. See [Section 12.3.3.2, "Primary User Role Seeded Permissions"](#), for more information on these two permissions.

In Oracle iStore, user management tasks are performed in the Customer UI **User Management** and **Role Management** pages accessible through the **Profile** button at the top right of the screen.

See [Section 12.3.2, "Setting Roles for Oracle iStore B2B Users"](#) for more information.

12.1.5 Reseller Users

The seeded **IBE_RESELLER_ROLE** is appropriate to assign to users who sell your products but are not internal to your organization. If you are integrating with Oracle Quoting, Reseller Users can create shopping carts, but cannot 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.

For a list of the permissions associated with this role, see [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).

12.2 User Registration

Oracle iStore leverages the Oracle CRM Technology Foundation HTML technology stack, which contains a complete user management module known as the Oracle CRM User Management Framework. Oracle iStore also has its own limited user

registration and management capabilities. You can either use the CRM Technology Foundation User Management functionality, the Oracle iStore user management functionality, or a combination of both.

This section contains:

- [Section 12.2.1, "Registering Using the Oracle CRM User Management Framework"](#)
- [Section 12.2.2, "Registering Using Oracle iStore User Management"](#)
- [Section 12.2.3, "Opting In/Opting Out"](#)

12.2.1 Registering Using the Oracle CRM User Management Framework

The Oracle HTML User Management pages are contained in the Oracle CRM Technology Foundation's HTML System Administrator console. This sysadmin console is accessible by logging into the Oracle E-Business Suite HTML login (JTF login) as system administrator (sysadmin).

To begin registration, users select the **Register Here** link on the JTF login page, and then select their user type from a list of user type choices. Depending upon the approval mechanisms in place, users are either automatically approved or approved by an administrative user.

For more information on utilizing the capabilities of the Oracle CRM Technology and Application foundations, see the following:

- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle CRM Technology Foundation Concepts and Procedures* (User Management chapter)
- *CRM Application Foundation Implementation Guide*
- *CRM Application Foundation User Guide*

These guides are available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

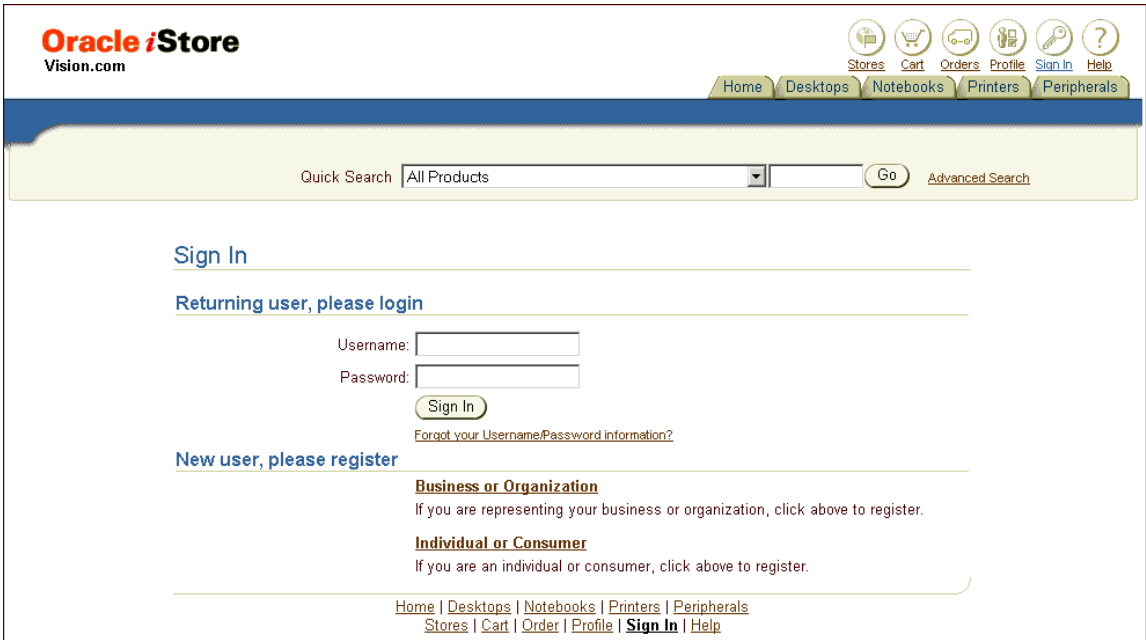
12.2.2 Registering Using Oracle iStore User Management

Oracle iStore users also can register in the Customer UI registration page. This page is accessible by selecting the **Sign In** button at the top right of the screen. This page also appears automatically when a guest user attempts to access functionality that is available only to signed-in users.

For steps to self-register as a B2B user, see [Section 12.2.4, "Self-Registration Steps for B2B Users"](#).

The following figure shows the **Sign In** page.

Figure 12–1 Oracle iStore Sign In Page



12.2.2.1 Sign In Page Messages

Oracle iStore is seeded with Oracle Applications (AOL) Message Dictionary messages for both B2B 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 by the setting of the profile options discussed earlier in this chapter (**IBE: Use Business to Customer Features** and **IBE: Use B2B Features**).

Oracle iStore is also seeded with a **Sign In** page message to display for returning users. You can change the text of the seeded messages. See [Chapter 14, "Implementing Messages and Prompts"](#), for details on how to access and modify the messages.

The following table summarizes the seeded **Sign In** page messages.

Table 12–1 Oracle iStore 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.
Label for B2C registration link	IBE_PRMT_IND_REG_MSG	If you are an individual or consumer, click above to register.
Link to self-service login assistance	IBE_PWD_FORGET	Forgot your Username/Password information?

12.2.3 Opting In/Opting Out

Oracle iStore users can choose whether or not to receive marketing communications based on their registration in a store. Users can specify their preference at registration and modify it later in their **Profile > Preferences** menu.

Note: The **Opt Out** state is assumed unless a user explicitly **Opts In** by selecting the *Send me marketing communications* checkbox and saving the preference (updating the page).

Opt In/Opt Out preferences are stored at the Party level (party_id in TCA schema), using the table, **HZ_CONTACT_PREFERENCES**.

12.2.3.1 Opt In/Opt Out Checkbox

In Oracle iStore, there are two locations where users can select Opt In/Opt Out preferences:

1. Unregistered user arrives at the **Registration** page. Or,
2. Registered user navigates to **Profile > Preferences**.

By default, the opt in/opt out preference checkbox always is *unchecked*.

The label on the checkbox is *Send me marketing communications*, which has the AOL message key, **IBE_PREF_OPT_IN_OUT**.

12.2.3.2 Table Entry with Explicit User Behavior

Following is the opt in/opt out action in the **HZ_CONTACT_PREFERENCES** table, according to specific actions on the part of the user:

- **User Explicitly Opt In** --- If the user explicitly elects to **Opt In** and updates the page, then the **Opt In** preference is stored automatically in **HZ_CONTACT_PREFERENCES** table, **Preference Code** column, as a **DO** entry.
- **User Explicitly Opt Out** --- If the user elects to **Opt Out** and updates the page, then the **Opt Out** preference is stored automatically in **HZ_CONTACT_PREFERENCES** table, **Preference Code** column, as **DO NOT** entry.

12.2.3.3 Table Entry with Creation of New B2B User by Primary User

Primary Users can create/register other B2B users for their organizations in Oracle iStore's User Management pages. In this case, no opt in/opt out data is stored for the created B2B user at the time of creation --- when the newly created user logs into the **Profile** pages for the first time, then the loading of these pages causes a row to be created in the **HZ_CONTACT_PREFERENCES** table for this user, with an entry of **DO NOT** in the **Preference Code** column, and an entry of **ALL** in the **Contact Type** column. At this point, the user implicitly is opted out of receiving communications. Only after the user explicitly elects to opt in does the table populate his row with **DO** in the **Preference Code** column.

12.2.4 Self-Registration Steps for B2B Users

B2B users can use the steps below to self-register using Oracle iStore's registration pages.

Steps

1. Navigate to the Customer UI and select the **Sign In** button at the top right of the screen. The Oracle iStore **Sign In** page appears.
2. In the **New user, please register** area, select the **Business or Organization** hyperlink. The **Business User Registration** page appears.
3. Select one of the following radio buttons:
 - **Existing Organization** --- If you know your organization ID (this is the same as Party ID, not account number), select the *Existing Organization* radio button and enter the organization ID in the textbox. Note that this textbox will **not** appear if B2B auto-approval is turned **on** (see [Section 12.1.3.1, "Setting the B2B Registration Approval Profile Option"](#)).

- **New Organization** --- To register as a user from a new organization, select the *New Organization* radio button.
- 4. If you have selected **New Organization**, fill out the required fields in the *Business Information* and *User Information* areas.
- 5. If you have selected **Existing Organization**, only fill out the required fields in the *User Information* area.
- 6. Optionally, check the **Opt In/Opt Out** checkbox, *Send me marketing communications*. For more information on opting in/opting out, see [Section 12.2.3, "Opting In/Opting Out"](#).
- 7. Select the **Submit** button to submit the information. A confirmation message will appear.

Note: Following their registration, B2B users receive an e-mail notification notifying them that they have been registered. However, they still need to be approved before they have full access to the Customer UI. No e-mail notification is sent to users upon their approval. The Primary User for the user's organization can follow the steps in [Section 12.1.3.2, "Explicitly Approving B2B Users"](#), to approve the user.

12.3 User Security and Access

In Oracle Applications, user security and access permissions are controlled through the use of *responsibilities* and *roles*. Users without a current session responsibility are considered *anonymous* users.

Responsibilities ---- When a registered user initially logs in to the Oracle E-Business Suite HTML login, the system checks the user's current responsibility and then passes the user into the menu structure associated with the HTML application to which that responsibility is linked. In this way, different user types can have different responsibilities and therefore can have different menus assigned to them.

Note that without customization, in Oracle iStore's Customer UI, you cannot assign different menu structures to different responsibilities. Oracle iStore comes with a seeded customer responsibility, IBE_CUSTOMER.

Responsibilities can either be granted automatically upon registration, through the use of the CRM User Management Framework, or on a case-by-case basis by an administrator. See the *Oracle CRM Technology Foundation Concepts and Procedures* (User Management chapter) for more information on responsibilities in the Oracle E-Business Suite applications.

Roles ---- Within each HTML page, granular permissions control which resources on a page a user is allowed to access. These resources may be a button, a data manipulation permission, a view permission, and so on. In Oracle HTML Applications, permissions are grouped into roles which can then be granted to users. Roles are granted either automatically (depending upon your configuration) or on a user-by-user basis by an administrator. See the *Oracle CRM Technology Foundation Concepts and Procedures* (User Management chapter) for more information on setting up roles.

This section contains:

- [Section 12.3.1, "Setting Responsibilities for Oracle iStore Users"](#)
- [Section 12.3.2, "Setting Roles for Oracle iStore B2B Users"](#)
- [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#)
- [Section 12.3.4, "Seeded Oracle iStore User Permissions Descriptions"](#)

12.3.1 Setting Responsibilities for Oracle iStore Users

If you are using Oracle iStore user management capabilities, you must specify the Oracle iStore 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 and B2C responsibilities are the Oracle CRM Technology Foundation default responsibilities for these user types.

Important: When you set the default responsibilities, the default application ID for both user types must be **671**, to indicate Oracle iStore. The responsibility ID can be **IBE_CUSTOMER** or any other Oracle iStore customer responsibility that you create.

- See *Oracle CRM Technology Foundation Concepts and Procedures* for instructions on setting Oracle CRM Technology Foundation default responsibilities.
- See *Oracle Applications System Administrator's Guide* for information on creating additional responsibilities.

12.3.2 Setting Roles for Oracle iStore B2B Users

In the context of Oracle iStore, roles apply only to B2B users. B2B users can be either regular B2B or Primary B2B users. Primary B2B users are identical in their security to regular B2B users, except that their role has two additional permissions **IBE_USER_ADMIN** and **IBE_ROLE_ADMIN** for user management and role management, respectively.

If self-registering, every B2B user receives, by default upon approval, the following roles:

- **IBE_PRIMARY_USER_ROLE** --- Primary User (administrative user) role.
- **IBE_BUSINESS_USER_ROLE** --- Regular B2B User role.
- **IBE_DEFAULT_ROLE** --- This is a non-current role which remains in the application for backward compatibility.

Important: Since all B2B users who self-register will automatically receive the Primary User role upon approval, the Primary User should manually remove this role from other B2B users after they are approved (as appropriate). See [Section 12.4, "Oracle iStore User Management Pages"](#), for instructions on using these pages.

Note: A B2B Primary User can only grant a role if he has that role himself.

If the seeded B2B user roles do not meet your business needs, you can create new roles with any combination of permissions. Use Oracle CRM Technology Foundation to create new roles.

- See *Oracle CRM Technology Foundation Concepts and Procedures User Management* documentation for instructions on creating new roles and mapping permissions to roles.

12.3.3 Oracle iStore Seeded Roles and Permissions

This section lists the seeded user roles and shows the permissions that are assigned by default to each role. Sections include:

- [Section 12.3.3.1, "Business User Role Seeded Permissions"](#)
- [Section 12.3.3.2, "Primary User Role Seeded Permissions"](#)
- [Section 12.3.3.3, "Reseller User Role Seeded Permissions"](#)

For permission descriptions, see [Section 12.3.4, "Seeded Oracle iStore User Permissions Descriptions"](#).

12.3.3.1 Business User Role Seeded Permissions

The following are the permissions that are seeded in the B2B user role, **IBE_BUSINESS_USER_ROLE**.

- **IBE_CANCEL_ORDER**
- **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

12.3.3.2 Primary User Role Seeded Permissions

The permissions that are seeded in the B2B Primary user role, IBE_PRIMARY_USER_ROLE, are identical to the ones in the normal B2B user role (IBE_BUSINESS_USER_ROLE), except for the additional permissions:

- **IBE_USER_ADMIN** --- This permission allows Primary Users to create and maintain other users within their organization in the Oracle iStore User Management pages, accessible through the Profile menu. See [Section 12.4, "Oracle iStore User Management Pages"](#), for more information.
- **IBE_ROLE_ADMIN** --- This permission allows Primary Users to perform role management tasks in the Oracle iStore Role Management pages, accessible through the Profile menu. See [Section 12.4.4, "Role Management Page"](#), for more information.

12.3.3.3 Reseller User Role Seeded Permissions

The following are the permissions that are seeded in the Reseller user role, IBE_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

Note: The B2B role for previous releases, IBE_DEFAULT_ROLE, is also seeded in Oracle iStore with identical permissions to IBE_BUSINESS_USER_ROLE, for backward compatibility.

12.3.4 Seeded Oracle iStore User Permissions Descriptions

This section describes the seeded role permissions that are supported for use in Oracle iStore.

Note: Some permissions enable certain UI objects to appear in the Customer UI, for the users with those permissions. For example, a user with IBE_CHANGE_BILLTO_CONTACT permission will see a Change button in the shipping and billing information pages. Similarly, a customer with IBE_CANCEL_ORDER permission will see a Cancel button next to orders that are cancellable in the Order Tracker pages. For users without these permissions, these UI objects do not appear.

Remember, however, that roles (and thus permissions) do not apply to B2C users. When they register, they automatically receive their default Customer UI permissions, which are the same as the B2B permissions with a few exceptions in

cart permissions. See [Chapter 11, "Implementing Carts and Orders"](#), for more information.

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. This permission is seeded in the application, but not seeded in any roles.

IBE_CANCEL_ORDER

Allows users to cancel orders that are in Booked or Entered state in Oracle Order Management.

IBE_CANCEL_ORGANIZATION_ORDER

Allows B2B users to cancel orders for their organizations.

IBE_CHANGE_BILLTO_CONTACT

Allows a user to change the bill-to contact name from the default (if any) bill-to contact name. This permission works in tandem with **IBE_CHANGE_BILLTO_CUSTOMER**.

IBE_CHANGE_BILLTO_CUSTOMER

Allows a user to change the bill-to customer from the default bill-to customer.

Note: If you explicitly grant this permission to a user, you should also grant the **IBE_CHANGE_BILLTO_CONTACT** permission to the user.

IBE_CHANGE_SHIPTO_CONTACT

Allows a user to change the ship-to contact name from the default (if any) ship-to contact. This permission works in tandem with **IBE_CHANGE_SHIPTO_CUSTOMER**.

IBE_CHANGE_SHIPTO_CUSTOMER

Allows a user to change the ship-to customer from the default ship-to customer.

Note: If you explicitly grant this permission to a user, you should also grant the **IBE_CHANGE_SHIPTO_CONTACT** permission to the user.

IBE_CREATE_BILLTO_CONTACT

Allows the user to create a new contact name 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.

IBE_CREATE_ORDER

Allows a user to submit a quote or cart as an order.

IBE_CREATE_SHIPTO_CONTACT

Allows the user to create a new contact name 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_IGNORE_THRESHOLD

Exempts a user from any Payment Threshold restrictions that are in place.

IBE_OVERRIDE_ITEM_PRICE

Allows the user to override prices manually.

IBE_ROLE_ADMIN

Allows a user to create additional roles for users in his or her organization.

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 attach files in the shopping cart.

IBE_USE_PRICING_AGREEMENT

Allows the user to use pricing agreements.

Note: The profile option, **IBE: Use Line Agreements**, specifies whether B2B users with the **IBE_USE_PRICING_AGREEMENT** permission can select pricing agreements at item level, in addition to the cart-level agreement selection enabled by the permission. This optional profile defaults to No if not set.

IBE_VIEW_CUST_WITHOUT_ACCOUNT

Allows a user to search on and retrieve existing customers without an account.

IBE_VIEW_INVOICE

Allows a user to view invoices related to the entire organization, through Order Tracker. Oracle iStore 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 Order Tracker. Oracle iStore 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 Order Tracker. Oracle iStore checks this permission only if the profile option, **IBE: Use Auth Permissions in Order Tracker**, is set to **Yes**.

12.3.4.1 iStore Permissions Not Currently Used

The following permissions are not currently used, but are seeded in some roles.

- IBE_CREATE_ADDRESS
- IBE_CREATE_PAYMENT_INSTRUMENT
- IBE_MODIFY_CART
- IBE_MODIFY_ORDER
- IBE_VIEW_ADDRESS
- IBE_VIEW_PAYMENT_INSTRUMENT

12.4 Oracle iStore User Management Pages

Oracle iStore Primary Users can use the **User Management** and **Role Management** pages within the Customer UI **Profile** menu to:

- Create users for their organizations
- Assign roles to users
- Assign an account to users who have self-registered, thus approving the users
- Create new roles and assign permissions to the new roles
- Update the permissions assigned to existing roles
- Reset passwords

Note: Primary Users can only perform these tasks for other B2B users within their organizations. See [Section 12.1.4, "Primary Users"](#), for more information on Primary Users, and [Section 12.1.3, "Registered B2B Users"](#), for more information on regular B2B users.

The User Management pages are available to users with the **IBE_USER_ADMIN** permission. The Role Management pages are available to users with **IBE_ROLE_ADMIN** permission. Both permissions are seeded only in the **IBE_PRIMARY_USER_ROLE**.

12.4.1 User Management Page

In the User Management pages, Primary Users can:

- View all users in his organization, even if he did not create them
- View and modify role assignments for these users
- Reset passwords for users within his organization

The following figure shows the User Management page available to the Primary User.

Figure 12–2 Oracle iStore User Management Page

User Management					
					Apply
					1 to 4 of 4
First Name	Middle Name	Last Name	Email	Username	Password
cmymrick_b2b		cmymrick_b2b	cmymrick@oracle.com	CMYRICK_B2B	
test		user3	carmen.myrick@oracle.com	TESTUSER3	
test		user1	cmymrick@oracle.com	TESTUSER1	
test		user4	carmen.myrick@oracle.com	TESTUSER4	
					1 to 4 of 4

The First Name fields in the User Management page table are hyperlinks that lead to the **User Details** page for a specific user. In the **User Details** page, the Primary User can assign roles to users and access the Assign Accounts functionality.

The following figure shows the **User Details** page.

Figure 12–3 User Details Page

User Details

Cancel

Apply

User

Username: TESTUSER3

Assign Accounts

Name: test user3

Account 1

Account Number: 3072

Account Name:

Assign Roles

Assign	Role Name	Description
☐	IBE_BUSINESS_USER_ROLE	Business User Role
☐	IBE_DEFAULT_ROLE	Default Role
☐	IBE_PRIMARY_USER_ROLE	Primary User Role

12.4.2 Creating B2B Users

To create another B2B user within his organization, the Primary User can follow these steps:

Steps

1. Sign in to the Customer UI and select a specialty store.
2. Select the **Profile** button at the top right of the screen. Reauthenticate, if necessary, by signing in again.
3. Select the **User Management** subtab.
4. In the **User Management** page, enter the user’s information into the following textboxes:
 - First Name
 - Middle Name (optional)
 - Last Name
 - Email
 - Username
 - Password

5. Select the **Apply** button to save the changes. The screen refreshes, with the user's information (except for the password) showing in the **User Management** page.
6. Next, assign roles to the user: In the **User Management** page, select the hyperlink of the user's first name. The **User Details** page for this user will appear.
7. In the **User Details** page, select the following roles:
 - **Business User Role** --- IBE_BUSINESS_USER_ROLE
 - **Default Role** --- IBE_DEFAULT_ROLE

Note: A Primary User can only grant a role if he has that role himself. If a Primary User views B2B users in the User Management pages who have roles that he does not have, these role assignments will not appear in the B2B users' role details.
8. Select the **Apply** button to save the changes. The newly created user is now approved and able to access the Customer UI as a B2B user within the Primary User's organization.

12.4.3 Approving B2B Users Who Have Self-Registered

Primary Users can use the steps below to approve users who have already self-registered for their organizations.

For steps B2B users can use to self-register, see [Section 12.2.4, "Self-Registration Steps for B2B Users"](#).

Steps

1. Sign in to the Customer UI and select a specialty store.
2. Select the **Profile** button at the top right of the screen. Reauthenticate, if necessary, by signing in again.
3. Select the **User Management** subtab.
4. In the **User Management** page, select the hyperlink of the user's first name. The **User Details** page for the user will appear.
5. Select the **Assign Account** button. The **Assign Accounts** page appears.

Note: If an account has already been assigned to the user (which happens for users explicitly created by the Primary User) the **Assign Accounts** page will not

have any accounts listed. You can find out if an account number has been assigned to a user by navigating to the **User Details** page.

6. To assign the account, select the checkbox next to the account number and select the **Apply** button.
7. In the **User Details** page, ensure that the user is granted the following role:
 - **Business User Role** --- IBE_BUSINESS_USER_ROLE

Note: A Primary User can only grant a role if he has that role himself. If a Primary User views B2B users in the User Management pages who have roles that he does not have, these role assignments will not appear in the B2B users' role details.

Important: Do not select the Primary User Role unless you wish the user to have user administration privileges.

8. Select the **Apply** button to save the changes. The user is now approved and able to access the Customer UI as a B2B user within the Primary User's organization.

12.4.4 Role Management Page

The **Role Management** pages let Primary Users:

- View available roles (but only for the roles he himself has been granted)
- Create new roles and assign permissions to these roles
- Modify existing roles by adding or removing permissions from them
- Define new roles
- Delete roles

Caution: Although there are Remove checkboxes for the seeded roles, **users should never delete these roles**. Deleting the roles in the Role Management page will also delete them from all other Oracle iStore B2B users' accounts.

The following figure shows the **Role Management** page available to Primary Users.

Figure 12–4 Oracle iStore Role Management Page

Role Management

Create Role

1 to 3 of 3

Role Name	Description	Remove
IBE_BUSINESS_USER_ROLE	Business User Role	
IBE_DEFAULT_ROLE	Default Role	
IBE_PRIMARY_USER_ROLE	Primary User Role	

1 to 3 of 3

12.4.4.1 Create Role Page

Users can select the **Create Role** button in the **Role Management** page to create new roles for users within their organization.

The following figure shows the **Role Creation** page.

Figure 12–5 Create Role Page

Create Role

Role Name:

Description:

12.4.4.2 Roles Detail Page

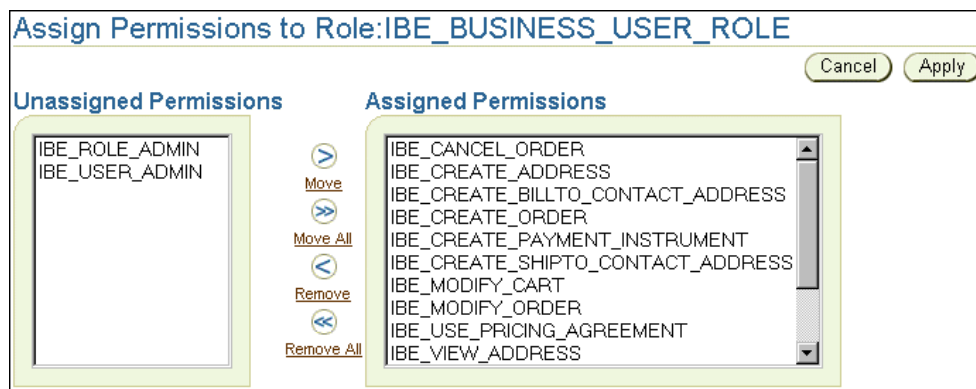
By selecting the hyperlink of the role name, the Primary User can:

- Drill down into the role details
- View the permissions assigned to the roles
- Change permission assignments for the roles

The user utilizes the Assigned Permission and Available Permissions shuttle windows to make the permission assignments for the role. For descriptions of the permissions, see [Section 12.3.3, "Oracle iStore Seeded Roles and Permissions"](#).

The figure below shows an example of the drill-down page for the IBE_BUSINESS_USER_ROLE.

Figure 12–6 Roles Detail Page



12.5 Setting up Self-Service Login Assistance

If users forget their user names or passwords, they can click the **Forget your Username/Password information?** link in the Sign In page to retrieve their login information. Oracle iStore Alert Workflow sends the seeded Forget Login e-mail notification to the user with his username and password.

This section contains:

- [Section 12.5.1, "Self-Service Login Assistance Process Flow"](#)
- [Figure 12–7, "Process Flow for Self-Service Login Assistance"](#)
- [Section 12.5.2, "Seeded Messages for Self-Service Login Assistance"](#)

12.5.1 Self-Service Login Assistance Process Flow

Following is the process flow for Self-Service Login Assistance:

1. User clicks the **Forget your Username/Password information?** link in the Sign In page. The Login and Password Assistance page opens.

In this page, the customer can enter:

- Username only
- E-mail address only

- Username and e-mail address

If a user does not remember either username or e-mail addresses, he must contact the store administrator to reset the password.

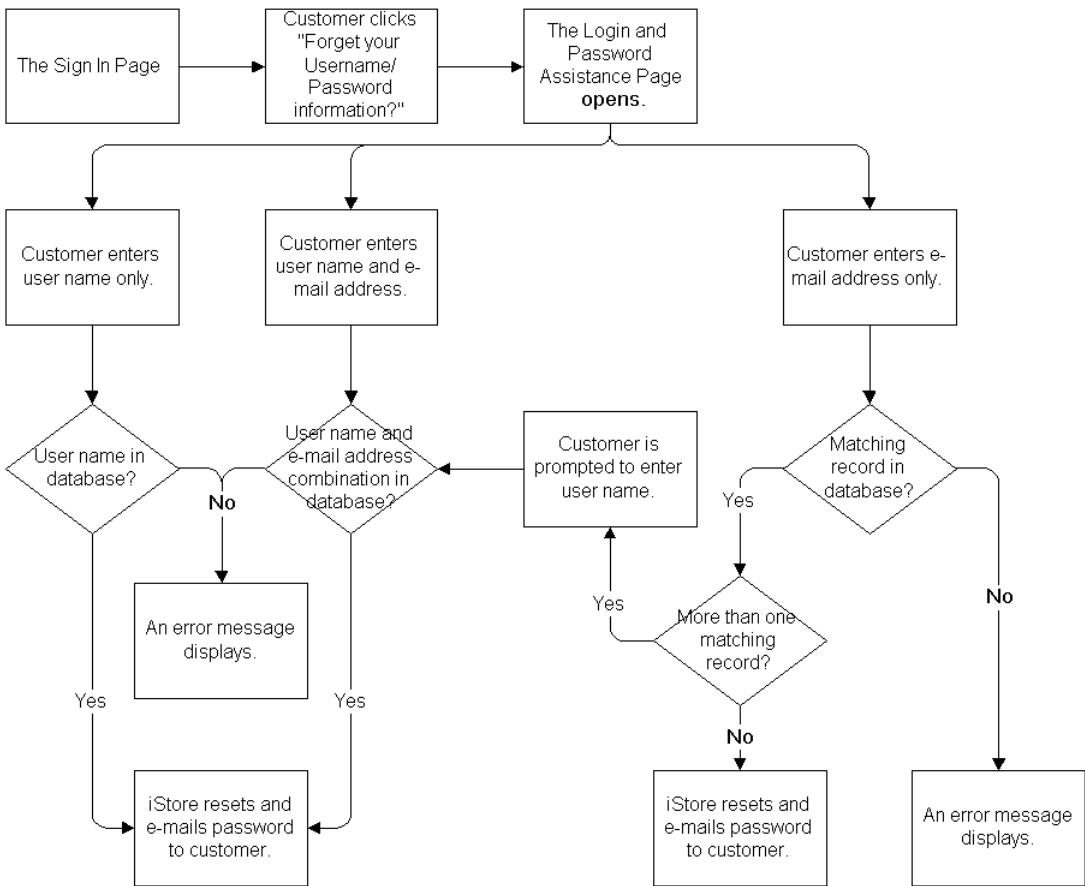
2. User submits the request.

- If the user has entered username only, Oracle iStore validates the username in the database. If a record of the user name exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If a record of the user name does not exist, an error message displays.
- If the user has entered username and e-mail address, Oracle iStore validates the user name and e-mail address combination in the database. If a record with the combination exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If a record with the combination does not exist, an error message displays.
- If the user has entered an e-mail address only, Oracle iStore validates the e-mail address in the database. If only one record with the e-mail address exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If no record with the e-mail address exists, an error message displays.

If more than one record with the e-mail address exists, the application prompts the customer to enter a username. The application then validates the user name and e-mail address combination in the database. If the combination exists, the application resets the password and e-mails it to the customer. If the combination does not exist, an error message displays.

The following diagram is a graphical representation of the process flow that Oracle iStore follows to retrieve a user's login information.

Figure 12–7 Process Flow for Self-Service Login Assistance



12.5.2 Seeded Messages for Self-Service Login Assistance

The prompts in the Login and Password Assistance page are seeded Oracle Applications Message Dictionary messages. Oracle iStore also uses Oracle Applications Message Dictionary messages when it sends an e-mail with a customer’s login information after the customer uses self-service login assistance. These messages are listed in the following table.

The following table, Self-Service Login Assistance Messages, shows the Self-Service Login Assistance messages that are seeded in the Customer UI.

Table 12–2 Self-Service Login Assistance Messages

Message Name	Description	Seeded Text ¹
IBE_PWD_EMAIL_BODY	The body of the e-mail sent to users with their login information	Dear &0, You are receiving this email because we recently received a request to e-mail your login information to you. You do not have to respond to or act on this email. Your account details are given below: Username: &1 Password: &2 As a security measure you should change your password immediately after logging on. IMPORTANT: Do not reply to this email. If you need to contact us, send an email to storehelpers_us@oracle.com. We appreciate your interest with us. Customer Care
IBE_PWD_EMAIL_SUBJECT	The subject line of the e-mail sent to users with their login information	Login information assistance
IBE_PWD_HELP_FOOTER	Tells customers who to contact for additional help	If you need additional help regarding your login information, feel free to send email to storehelpers_us@oracle.com. We will be happy to assist you.

¹ The strings preceded by an ampersand (&) are dynamically replaced with user-specific information by Oracle iStore.

You must modify the messages IBE_PWD_EMAIL_BODY and IBE_PWD_HELP_FOOTER to change the seeded e-mail address storehelpers_us@oracle.com to your own store administrator's e-mail address.

- See [Chapter 14, "Implementing Messages and Prompts"](#), for details on how to access and modify the messages.

Implementing Customer Assistance

This chapter describes how to implement Oracle iStore 11i's customer assistance features.

Main topics in this chapter include:

- [Customer Assistance Features Overview](#)
- [Setting up Sales Assistance](#)
- [Setting up Call Me Back Assistance](#)

13.1 Customer Assistance Features Overview

Oracle iStore provides mechanisms that allow customer assistance in your online stores. These include:

- **Sales Representative Assistance** -- See [Section 13.2, "Setting up Sales Assistance"](#).
- **Call Me Back Assistance** --- See [Section 13.3, "Setting up Call Me Back Assistance"](#).

13.2 Setting up Sales Assistance

During the checkout process, users can request assistance from a sales representative to help them finalize their orders. Using the sales assistance feature is optional and is enabled by setting the sales assistance profile option. This section contains:

- [Section 13.2.1, "Sales Assistance Business Flow"](#)
- [Section 13.2.2, "Setting the Sales Assistance Profile Option"](#)

- [Section 13.2.3, "Sales Assistance Seeded Messages and Prompts"](#)

13.2.1 Sales Assistance Business Flow

Sales assistance events proceed as follows:

Note: Recipients of a shared cart cannot request sales assistance.

1. A user logs in to a web store.
2. The user browses the catalog, creates a shopping cart, activates a saved shopping cart, or views a published quote.
3. The user proceeds to checkout.
4. In the **Review Order Details and Confirm** page, the user clicks the **Request Assistance** button.
5. The **How can we assist you in finalizing your order?** page opens. In this page, Oracle iStore prompts the user to save the shopping cart with a name, according to these rules:
 - a. If the cart is not a saved cart or published quote, the user must save the cart.
 - b. For saved carts and published quotes, existing names will display on the page; the customer will not be able to change the name.
6. The user must choose from a list of reasons why he needs assistance, and enter comments. The user contact information is displayed.
7. The user submits the request by clicking the **Submit Request** button.
8. Oracle iStore displays the confirmation page, **Request Sales Assistance Confirmation**.

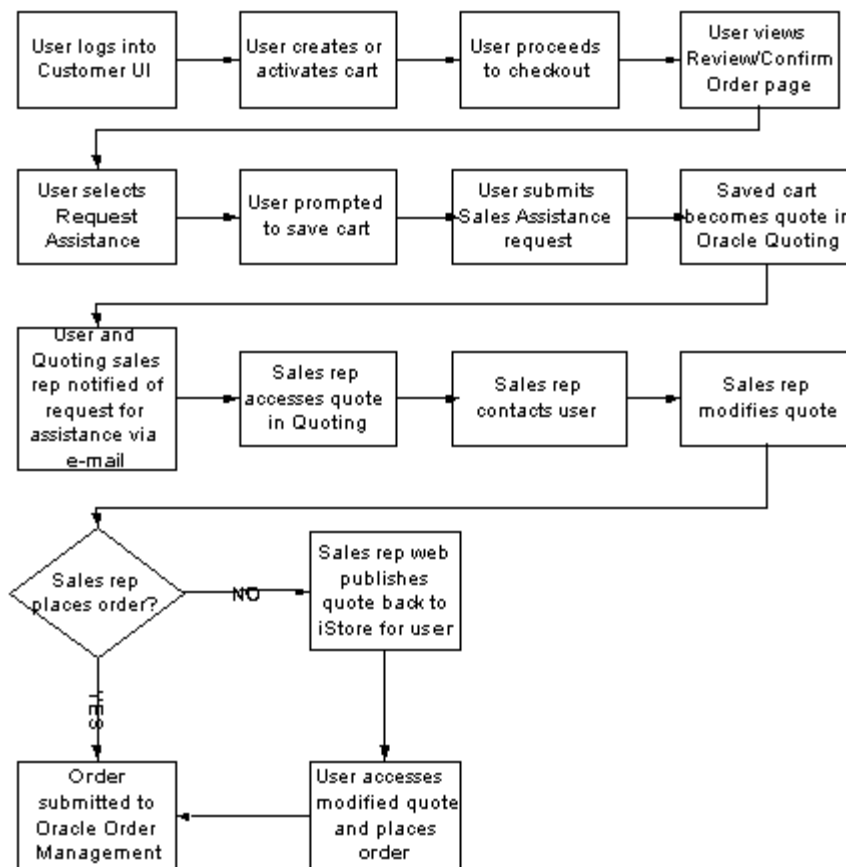
This page informs the user that his request has been received and that a sales representative will contact him in the next one to two business days. The page also shows the quote number, and summarizes the cart or quote details, including any shipping and payment information entered.
9. The user can access the quote in the **Quotes** subtab under the Cart menu, and place the order if desired.
10. Using Oracle Workflow, Oracle iStore sends an email notification to the user notifying him that his request has been received.
11. The Oracle iStore cart becomes a quote in Oracle Quoting.

12. Oracle iStore sends a notification to the user's sales representative specified in the profile option ASO: Default Salesrep. See *Oracle Quoting Implementation Guide* for more details.

The user's comments are included in the e-mail sent to the sales representative.

13. The sales representative can then contact the user, provide the necessary assistance. Then, if desired, he can access the quote in Oracle Quoting, modify it, and re-publish it to the web store.
14. At any time when a quote has a status with a valid transition to the quote status Order Submitted, the user can submit the quote as an order. See *Oracle Quoting Implementation Guide* for information about quote statuses and status transitions. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for more information on the integration between Oracle iStore and Oracle Quoting.

The figure below shows the process flow.

Figure 13–1 Oracle iStore Sales Assistance Process Flow

13.2.2 Setting the Sales Assistance Profile Option

When you are ready to activate the Sales Assistance feature, set the following profile option at the application level for Oracle iStore:

- **IBE: Use Sales Assistance Feature** --- This profile option specifies whether Sales Assistance is enabled in your web stores. Set to **Yes** to enable the feature; set to **No** to disable the feature.

The profile option defaults to **Yes** if not set.

13.2.3 Sales Assistance Seeded Messages and Prompts

- **Reasons for Requesting Sales Assistance** -- This is a dropdown list of reasons why the customer is requesting assistance. It displays in the page that appears after user selects Request Assistance button. Seeded values are:
 - More Product Info
 - Product Availability
 - Terms and Condition
 - Financing Options
 - Other
- **Request Sales Assistance Confirmation message** -- Displays immediately after user selects Submit Request button.
- **How Can We Help message** -- Displays in the How Can We Help page which appears after user selects Submit Request button.

All Oracle iStore messages and prompts are stored in the FND_MESSAGES table in Oracle Applications Object Library (AOL).

- For more information on what is seeded (supplied) and instructions on how to modify the messages and prompts, see [Chapter 14, "Implementing Messages and Prompts"](#).

The following table, Oracle iStore Sales Assistance Seeded Prompts, shows the prompts that are supplied with the Sales Assistance feature.

Table 13–1 Oracle iStore Sales Assistance Seeded Prompts

Message Name	UI Prompt Content
IBE_SA_FIN_OPTION	More information regarding financing options
IBE_SA_MORE_PRODUCT_INFO:	More product information needed
IIBE_SA_OTHERS:	Other information needed
IBE_SA_PRODUCT_AVAIL:	More information regarding product availability
IBE_SA_TANDC:	More information regarding Terms and Conditions

13.3 Setting up Call Me Back Assistance

Oracle iStore's Call Me Back feature allows you to offer your customers Call Me Back Assistance. With the callback feature, users can click a link in the Welcome Bin to request that a merchant representative call them back.

This section provides an overview of the call-back functionality in Oracle iStore.

For information related to the applications that provide the underlying technology for the Call Me Back feature, consult relevant Call Center Technology product documentation on [Oracle MetaLink](#).

This section includes:

- [Section 13.3.1, "Call Me Back Business Flow"](#)
- [Section 13.3.2, "Call Me Back Dependencies"](#)
- [Section 13.3.3, "Setting the Call Me Back Profile Option"](#)

13.3.1 Call Me Back Business Flow

The business flow for the Call Me Back functionality is:

1. In Oracle iStore, a customer selects the Call Me Back link in the Welcome bin.
2. Once the call-back entry is made by the user, Oracle iStore sends the request to the CCT server group specified during implementation.
3. Oracle iStore calls the CCT APIs to provide the list of available call center server groups.
4. The CCT applications and hardware route the request to the Universal Work Queue (UWQ) server.
5. The UWQ server decodes the customer information (the Notes module captures comments from user) and assigns it to the UWQ client, and the call request immediately pops up in an agent's screen in Oracle Customer Care.

13.3.2 Call Me Back Dependencies

The web call-back requires implementation of:

- CRM Interaction Center (formerly Call Center Technology - CCT) suite
- Oracle Universal Work Queue (UWQ)
- Oracle Customer Care

- Oracle CRM Foundation, Notes module

The purchase of call center hardware also is required.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products which enable the Call Me Back functionality in Oracle iStore.

13.3.3 Setting the Call Me Back Profile Option

Once the dependencies listed above are installed and functioning properly, set the following profile option at the application level for Oracle iStore:

- **IBE: Use Call me Back ---** This profile option specifies whether the callback feature is enabled. Set to Yes to utilize the feature.

The profile option defaults to value No if not set.

Implementing Messages and Prompts

This chapter provides an overview of the tasks required to configure and customize Oracle iStore 11i message text and message prompts.

Topics include:

- [Store Text Messages Overview](#)
- [Modifying Text Messages](#)
- [Store-Specific Messaging](#)
- [Modifying Oracle Application Object Library Lookups](#)

14.1 Store Text Messages Overview

In Oracle iStore, the Customer UI pages display various messages. The text for most of the messages comes from the Oracle Applications Message Dictionary (AOL). Each Message Type or Message Name in AOL is associated to a single block of content for every supported language. Oracle iStore ships with over 100 seeded AOL Messages and associated seeded message text for the Customer UI, and over 115 for the Store Administration UI. The seeded text for the Customer and Store Administration UI can be found in the FND_NEW_MESSAGES table.

Seven of the AOL text messages are seeded as media objects in the Store Administration Media Objects pages. See [Section 8.5.1, "Using Media Objects to Present Message Text"](#), for details.

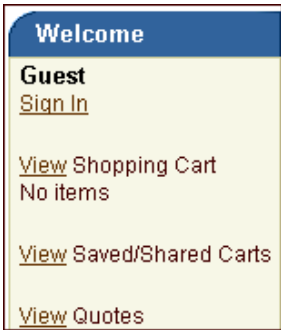
The following table, Store Administration and Customer UI Seeded Text Messages Sample, lists a few examples of seeded message text for the Customer and Store Administration UIs.

Table 14–1 Store Administration and Customer UI Seeded Text Messages Sample

Message Name	Message Text	User Interface	Context
IBE_M_ADD_PRODUCTS_LBL	Add products to the section	Store Administration UI: Product Catalog	Description for adding products to a section page
IBE_M_CONFIRM	Are you sure?	Store Administration UI	Confirmation message for deleting a store
IBE_PRMT_EXPRESS_CHKOUT_PREF_G	Express Checkout	Customer UI: Personal Information Profile Pages	Text that appears on top of Personal Information Page
IBE_PRMT_WELCOME_G	Welcome	Customer UI: Welcome Message Bin	Text that appears in the Welcome Message Bin

The following figure shows the seeded Welcome Bin on the Store Home Page. Each of the text messages in the bin is its own separate text message. See [Section 14.2.1, "Locating Text in JSPs"](#), for details on how to find the message names in the JSPs.

Figure 14–1 Oracle iStore Welcome Bin Showing Seeded Text Messages



14.2 Modifying Text Messages

The seeded text in bins may not apply to your specific implementation. As a result, you may want to change the default text. Use the following procedure to change the text of an Oracle Application Object Library (AOL) message.

For instructions on how to find the name of a specific message, see [Section 14.2.1, "Locating Text in JSPs"](#), below.

Prerequisites

None

Responsibility

Application Developer

Login

Oracle Forms

Steps

1. Log in to Oracle Forms with the Application Developer responsibility and select **Application > Messages**. The Messages window opens.
2. Choose **View > Find**. The Messages search window opens.
3. In the Find field, enter IBE% and click **Find**. Your search results display in the **Messages** search window.
4. Select the message that you want to modify and click **OK**. The Messages window is populated with the selected message.
5. Modify the message text for the appropriate language.

Guidelines

- The Oracle convention for an Oracle iStore message name begins the name with "IBE."
- It is recommended that you bounce the Apache server after making any message text changes.

14.2.1 Locating Text in JSPs

It may be cumbersome for you to locate specific messages found in the Customer or Store Administration UI. To simplify the process, you can find a specific message name by viewing the source code of the JSP file displaying it. Use the following procedure to locate AOL message text found in the Oracle iStore JSPs.

Prerequisites

UNIX account and access to the OA_HTML directory

Responsibility

Application Developer

Login

Oracle Forms

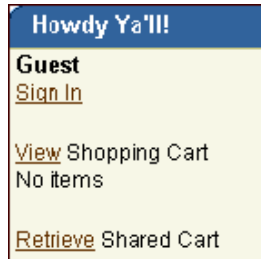
Steps

1. In the Customer UI, navigate to a page containing message text. For example, navigate to the Store Home Page (ibeCZzpHome.jsp) that displays the Welcome Bin.
2. From the browser menu bar choose **View > Source**.
3. Choose **Edit > Find**. The Find window opens.
4. In the **Find** window, enter the text to locate.
 - For example, if looking for the text in the Welcome Bin, type **Welcome** in the Find window.
5. In the HTML source file, search for the JSP that correlates to the bin containing the associated message.
 - For example, the Welcome text is found in the ibeCAcdWelcome.jsp.
6. Log onto the application server and navigate to the OA_HTML directory. Once here, do a search for the `ibe*.jsp` that you are looking for.
 - In the **previous** example, we would be locating the **ibeCAcdWelcome.jsp**.
7. Open the JSP file and locate the **AOL Message Name** that correlates to the text you are looking for.
 - In the **Welcome** example, the AOL Message name is **IBE_PRMT_Welcome_G**.
8. Next, log in to Forms with the Application Developer Responsibility.
9. Choose **Application > Message**.
10. Choose **View > Find**. The **Message** search window opens.
11. In the **Find** field, enter the name of the message you are looking for.
 - In the **Welcome** example, **IBE_PRMT_MESSAGE_G%** would be entered.
12. Select the message and select **OK**.
13. Change the **Current Message Text** as needed.

14. Save your changes.

The figure below is an example of the Welcome Bin with changes made to the seeded messages.

Figure 14–2 Oracle iStore Welcome Bin Showing Altered Seeded Text Messages



14.2.2 Translating Message Text

Specialty store text messages, prompts, and labels can be translated into 37 different languages. If you have properly installed and implemented multiple languages, the seeded content will be translated automatically. However, if you have modified the seeded messages, then you will need to manually translate the text, prompt, or label.

For example, the Welcome Bin has the default text in American English -- *Welcome*. If Spanish has been properly implemented as an additional language, then the seeded text *Welcome* is automatically translated to *Bienvenido* in the Spanish store. If the seeded content has been altered, then the translation will not happen automatically and must be configured manually.

For information on implementing multiple languages, see [Section 2.5, "Multi-Language Setup \(MLS\)"](#).

To manually translate message text, see [Section 14.2, "Modifying Text Messages"](#).

14.3 Store-Specific Messaging

In addition to translating messages and customizing default text for messages, you can also display different messages for particular types of stores.

For example, a single Oracle iStore implementation may have three different stores that are active. In this example, one of the three stores is a B2B store which allows customers to place an order by faxing a purchase order. The other two stores are

B2C stores and do not accept purchase orders. The B2B store, then, must have a specific text message that communicates this functionality in the Customer UI.

In Oracle iStore it is possible to map specific messages to specific stores using the Store Administration UI's media object functionality. The store-specific message is created and saved as an HTML file. Then, the new message (HTML file) is added as a source file for a media object and mapped to a particular store using the Store Administration UI.

- See the next section, [Section 14.3.1, "Seeded Store Messages"](#), for more information.
- See [Section 8.5, "Understanding Media Objects"](#), to learn how to map media objects.

14.3.1 Seeded Store Messages

Oracle iStore ships with four seeded Customer UI text messages for which you can add store-specific content. These text messages are seeded as media objects with programmatic access names identical to the Oracle Applications Message Dictionary Names.

For each seeded message, if you want to reconfigure the text, you will need to create and upload an HTML source file with the desired text, then you will map it to a particular store. If there is no HTML file mapped to a store for a message, Oracle iStore will default to the message stored in AOL.

The seeded text messages that allow store-specific content are listed in the following table with their Oracle Applications Message Dictionary names, the JSP associated, and Customer UI context in which they appear.

Table 14–2 Seeded Text Messages for Store Content

Message Name	JSP and Context
IBE_PRMT_HELP_MESG_G	ibeCZzdHelp.jsp Help Desk Index Page (customer service contact information, such as telephone numbers and e-mail addresses) You can customize ibeCZzdHelp.jsp or create a new JSP and map it to the template with the programmatic access name STORE_CUSTOM_HELP. ibeCZzdHelp.jsp includes the template with the programmatic access name STORE_CUSTOM_BOTTOM.

Table 14–2 Seeded Text Messages for Store Content (Cont.)

Message Name	JSP and Context
IBE_PRMT_ORD_NEW_CREDIT_CARD	ibeCPmdPmtOptions.jsp Payment and Billing Information Page (new credit card payment option)
IBE_PRMT_PMTBK_FAX_CC_MSG	ibeCPmdPmtOptions.jsp Payment and Billing Information Page (fax credit card payment option)
IBE_PRMT_PMTBK_PO_MSG	ibeCPmdPmtOptions.jsp Payment and Billing Information Page (purchase order payment option)

Use the following procedure to create a Customer UI message for a store.

Prerequisites

- Create an HTML file with the desired text message.
- If you are storing your media source files in the file system, place the HTML file in the `/OA_MEDIA/` directory.
- If you are storing your media source files in the database, upload the HTML file to the database or place it in your local directory for upload during the procedure.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and navigate to the **Content** tab > **Media Objects** subtab.
2. In the **Media Objects** page, search for the media object with a programmatic access name identical to that of the Oracle Applications Message Dictionary message you want to modify for the store.

3. In the search results, select the media object's name. The Media Object Details page opens.
4. Add the HTML source file to the media object as described in [Section 8.5, "Understanding Media Objects"](#). Use the following guidelines:
 - Map the HTML file to the store where you want it to appear.
 - Do not set the HTML file as the default source file.

14.3.2 Creating Custom Store Messages

You can add custom messages for stores using the Oracle Applications Message Dictionary, the Oracle iStore media objects functionality, and the Java API `DisplayManager.getTextMediaOrFndMsg()`.

Use the following procedure to add a custom message.

Prerequisites

- Create an HTML file with the desired text message.
- If you are storing your media source files in the file system, place the HTML file in the `/OA_MEDIA/` directory.
- If you are storing your media source files in the database, upload the HTML file to the database or place it in your local directory for upload during the procedure.

Responsibility

Application Developer

Login

Oracle Forms

Steps

1. Create the default message in Oracle Applications Message Dictionary as follows:
 - a. Log in to Oracle Forms with the Application Developer responsibility.
 - b. Choose **Application > Messages**. The Messages window opens.
 - c. Create a new message. The Oracle convention for an Oracle iStore message name begins the name with **IBE**.

- d. Create translations if necessary.
 - e. Save the message.
2. In Oracle iStore, create a media object with the same programmatic access name as the Oracle Applications Message Dictionary message name. See [Section 8.5, "Understanding Media Objects"](#), for instructions.
 3. Add the HTML source file to the media object as described in [Section 8.5.4, "Assigning Content Items to Media Objects"](#). Use the following guidelines:
 - Map the HTML file to the specialty store where you want it to appear.
 - Do not set the HTML file as the default source file.
 4. In the JSP that should display the message, use the `DisplayManager.getTextMediaOrFndMsg()` API to call the message.

For example, if the message name is `IBE_STORE_WELCOME` and you want to display it in your stores' home pages (`ibeCZzpHome.jsp`), you would add the following API call in `ibeCZzpHome.jsp`:

```
DisplayManager.getTextMediaOrFndMsg("IBE_STORE_WELCOME")
```

14.4 Modifying Oracle Application Object Library Lookups

Oracle Application Object Library lookups provide some of the lists of values in the Customer UI and the Store Administration. The modifiable LOVs and their lookup names include:

- **Sales Assistance Prompts** --- `IBE_SALES_ASSIST_REASONS_LK`. See [Section 14.4.1, "Sales Assistance Reasons Lookups"](#).
- **Shared Cart Access Levels** --- `IBE_SALES_ASSIST_REASONS_LK`. See [Section 14.4.2, "Share Cart Access Levels Lookups"](#).
- **Media Object and Content Component Classes** --- `IBE_M_MEDIA_OBJECT_APPLI_TO`. See [Section 14.4.3, "Media Objects and Content Components Classes Lookups"](#).

You can change the values of the names and descriptions for these lookups by using the following procedure.

Prerequisites

None

Responsibility

Application Developer

Login

Oracle Forms

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. Query for the lookup which you are modifying.
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. In the **Description** field, enter a description for the lookup code. This is the description that will show up in the Customer UI drop down list.
 - d. Optional: In the **From** and **To** fields, select the effective dates for the lookup code.
 - e. Check the **Enabled** checkbox.
6. Save the form.

14.4.1 Sales Assistance Reasons Lookups

Customers can request help from a sales representative through iStore's Sales Assistance feature. You can use AOL to 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**.

The following table, Oracle iStore Sales Assistance Seeded Prompts, shows the five seeded Sales Assistance Prompts that Oracle iStore ships with.

Table 14–3 Oracle iStore Sales Assistance Seeded Prompts

Message Name	UI Prompt Content
IBE_SA_FIN_OPTIONS	Financing Options
IBE_SA_MORE_PRODUCT_INFO	More Product Info
IBE_SA_OTHERS	Others
IBE_SA_PRODUCT_AVAIL	Product Availability
IBE_SA_TANDC	Terms and Conditions

For more information on Oracle iStore’s Sales Assistance feature, see [Section 13.2, "Setting up Sales Assistance"](#) in [Chapter 13, "Implementing Customer Assistance"](#).

14.4.2 Share Cart Access Levels Lookups

Store administrators can change the seeded names and descriptions for shared cart access levels. You accomplish this by changing lookup codes with meanings for the AOL lookup type, **IBE_QUOTE_UPDATE_PRIVILEGE**.

The following table, Seeded Share Cart Access Levels, shows the seeded access level values for shared carts:

Table 14–4 Seeded Share Cart Access Levels

Access Level Name	Description
Full	Permission to add comments, modify cart and place order.
Update	Permission to add comments and modify cart, shipping and billing information.
Read Only	Permission to add comments and view cart details.

14.4.3 Media Objects and Content Components Classes Lookups

Store administrators can change the class designations for the media objects and content components in the Store Administration UI. To do this, you must modify the lookup, **IBE_M_MEDIA_OBJECT_APPLI_TO**.

The following table, Seeded Media Object and Content Component Classes, shows the seeded classes for these items:

Table 14–5 Seeded Media Object and Content Component Classes

Access Level Name	Description
Product	For media objects or components applicable to product display
Section	For media objects or components applicable to section display
Section and Product	For media objects or components applicable to section and product display
Message	For media objects applicable to message display
Logo	For media objects applicable to logo display
Others	For all other classes

Implementing Reports

This chapter describes how to implement and use Oracle iStore 11*i* Reports and Bins.

Main topics in this chapter include:

- [Overview of Oracle iStore Reports](#)
- [Implementing Oracle iStore Reports](#)
- [Using the Bins Dashboard](#)
- [Setting Bin Preferences](#)
- [Setting up E-mail Delivery for Reports](#)
- [Oracle iStore Business Reports Details](#)
- [Oracle iStore Operational Reports Details](#)
- [Understanding Oracle iStore Reports Architecture](#)
- [Oracle iStore Reports Lookup Types](#)

15.1 Overview of Oracle iStore Reports

Oracle iStore features pre-defined business and operational reports that collect and present valuable data about your stores and your customers.

Business Reports and Bins present the following data:

- Number of orders placed for a given time period
 - **Note:** Orders must be in **Booked** state before they appear in Oracle iStore reports.
- The types of users making purchases and the top customers

- Top product sales for specific time periods
- Number of shopping carts converted to orders

Operational Reports and Bins present the following data:

- Product assignment and published/unpublished status reports
- Section assignment and published/unpublished status reports

Drawing on Oracle Discoverer 4i and Oracle iStore Dashboard Reports and Bins, the reports are presented within the **Store Administration UI Reports tab**. Integration with Oracle Workflow allows you to configure e-mail notification of two of the reports.

Using Oracle iStore Reports is optional.

Oracle iStore reports are of three types:

- Oracle iStore Dashboard Reports and Bins
- Oracle Discoverer 4i Reports
- E-Mail Notifications

15.1.0.1 Business Reports Overview

The table below, Business Reports in Oracle Store, summarizes the business report formats available in this release.

Table 15–1 Business Reports in Oracle iStore

Report Name	Dashboard Report/Bin	Discoverer Report	E-Mail Notification
Top Product Sales Report	Yes	Yes	No
Customer Sales Report	Yes	Yes	No
Top N Orders Report	Yes	Yes	Yes
Store Order Summary Report	Yes	No	Yes
Sales by Agreement Report	No	Yes	No
Shopping Cart Conversion Report	No	Yes	No
Sales by End User Type Report	No	Yes	No

15.1.0.2 Operational Reports Overview

The table below, Operational Reports in Oracle Store, summarizes the operational report formats available in this release.

Table 15–2 Operational Reports in Oracle iStore

Report Name	Dashboard Report/Bin	Discoverer Report	E-Mail Notification
Unassigned Products Report	No	Yes*	No
Assigned Products Report	No	Yes*	No
Products by Store Report	No	Yes*	No
Products Excluded by Store Report	No	Yes*	No
Unpublished Products Bin	Yes*	No	No
Sections With Store Assignment Report	No	Yes*	No
Sections Without Store Assignment Report	No	Yes*	No
Sections With Store Exclusion Report	No	Yes*	No
Empty Sections Report	No	Yes*	No
Unpublished Sections Bin	Yes*	No	No

* = new in this release

All of the reports except those delivered through e-mail notifications are accessible in the **Reports** tab of the Oracle iStore Store Administration UI. **E-Mail delivery** is configured in the **Reports > Email Report** menu and utilizes seeded Oracle iStore Notification Events to mail the reports to users' e-mail inboxes.

Descriptions of each report can be found in [Section 15.6, "Oracle iStore Business Reports Details"](#), and [Section 15.7, "Oracle iStore Operational Reports Details"](#).

15.2 Implementing Oracle iStore Reports

Reports in Oracle iStore leverage the following:

- Oracle General Ledger Calendar
- Oracle Order Capture and Oracle Order Management data tables
- Oracle iStore fact tables and related concurrent program

- Oracle iStore materialized views and related concurrent program
- Oracle iStore Order Facts Sources lookup types
- Oracle iStore Data Out Bins, which use the Oracle DCF framework
- Oracle iStore Dashboard Reports
- Oracle iStore Notification Events
- Oracle Discoverer 4i application
- Oracle Workflow iStore Reports

The following are required to successfully set up the Oracle iStore Reports:

- [Section 15.2.1, "Set up Calendar in General Ledger"](#)
- [Section 15.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 15.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 15.2.4, "Set Conversion Rates"](#)
- [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#)
- [Section 15.2.6, "Verify Discoverer Implementation"](#)

Optional setup steps are covered in:

- [Section 15.3, "Using the Bins Dashboard"](#)
- [Section 15.5, "Setting up E-mail Delivery for Reports"](#)

15.2.1 Set up Calendar in General Ledger

You must create a single calendar in Oracle General Ledger (GL) with the periods types: Day, Week, Month, Quarter, and Year, in order for the Reports to work.

Or, if you do not want to add all of these periods to the GL calendar, for reporting purposes you can create a separate calendar for iStore in GL with the needed period types.

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

15.2.2 Set up Oracle Discoverer 4i for Use in Oracle iStore

Oracle Discoverer 4i is a required dependency for Oracle iStore's Reports. This section contains Oracle iStore-specific steps required for Oracle Discoverer 4i implementation.

Note: iStore Discoverer Reports are available only from Minipack 11i.IBE.M and onwards.

Important: Before beginning Discoverer setup:

Read [Oracle MetaLink](#) Note 185342.1, *Oracle Discoverer End User Layer (EUL) Release Notes*.

To obtain Note 185342.1: Log into [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and query with **Note 185342.1** in the search utility to retrieve the note.

- [Step 1 - Ensure Application of Oracle iStore Release Minipack 11i.IBE.M or Oracle Applications Release 11.5.8](#)
- [Step 2 - Set up Oracle Discoverer for Oracle 11i Applications](#)
- [Step 3 - Post Installation Steps - Specific to iStore Setup](#)
- [Step 4 - Test iStore Discoverer Reports](#)

15.2.2.1 Step 1 - Ensure Application of Oracle iStore Release Minipack 11i.IBE.M or Oracle Applications Release 11.5.8

Ensure that you have applied either Oracle iStore Release Minipack 11i.IBE.M or Oracle Applications Release 11.5.8. This will ensure that all of the database objects, seed data, and Discoverer eex files for the Oracle iStore Reports are installed.

15.2.2.2 Step 2 - Set up Oracle Discoverer for Oracle 11i Applications

Please follow the steps mentioned in the [MetaLink](#) Note 185342.1 for generic setup steps.

15.2.2.3 Step 3 - Post Installation Steps - Specific to iStore Setup

1. Grant **EUL User Edition** privileges to the Oracle iStore Administrator (manager) responsibility.

Example: Grant privileges to responsibility, iStore Administrator.

Steps

- a. Log in to Oracle Discoverer 4i Administration Edition using the database username, password, and database created in [Section 15.2.2.2, "Step 2 - Set up Oracle Discoverer for Oracle 11i Applications"](#), above.

Example: Log in as EUL4_US/EUL@customDB.

- b. Open the **Privilege** dialog box using **Tools > Privileges**.
- c. In the **Privileges** tab, from the LOV select the **application responsibility** to which you are granting the privileges.

Example: Select **iStore Administrator** from the LOV.

- d. Select **checkboxes** for the following privileges:

--- User Edition ---

--Create/Edit Query

--Collect Query Statistics

--Item Drill

--Drill Out

--Grant Workbook

--Save workbooks to database

- e. Select **Apply** to save changes.

15.2.2.4 Step 4 - Test iStore Discoverer Reports

This section details how to test that you have properly set up the Discoverer Reports for Oracle iStore.

Important: Before you begin testing, you will need to bounce the Apache port. This is necessary to reload the site-level profile options.

15.2.2.4.1 Testing on Discoverer Viewer

Use the following steps to test the iStore Discoverer Reports on Discoverer Viewer.

1. Connect to the following URL:
`http://<discoverer server>:<port>/discoverer4i/viewer/`
2. Log in using:
 - User Name** = **ibe_admin:** (Note the ":" at the end of the apps username.)
 - Password** = <enter the appropriate password>
 - Database** = <database> *For example:* CustomDB
 - Language** = <select from language list>

3. After logging in, select the **iStore Administrator** responsibility hyperlink.
4. Ensure that you are connected to the correct EUL:
 - a. Select the **Options** menu.
 - b. Check the **current EUL** from the **End User Layer Access** section.

If the EUL is not correct, change it, and select **Apply** to save changes.
5. You should see a list of the available iStore Discoverer reports. To view any of the reports, select the appropriate hyperlink.

15.2.2.4.2 Testing on iStore Store Administration UI

Use the following steps to test the iStore Discoverer Reports in the iStore Store Administration UI:

1. Log in to the Store Administration UI as a user with the **iStore Administrator** responsibility.
2. Navigate to the **Reports** tab.
3. Select **Discoverer Reports**. You should see a list of six reports on the page.

In this page, if you see the message: ***Post installation/Configuration steps are required to correctly run the reports***, then please verify that you have followed all of the steps mentioned above, and bounce the Apache port.

The cause for this message can also be viewed by looking at the source of the jsp page. The possible error would be prefixed and suffixed with the string `ERROR LOG:`.

Also, you may be able to refer to the error message and Discoverer profile setting details which are logged into the IBE middle-tier log files.

4. Select any of the report hyperlinks to launch the desired report.

15.2.3 Set iStore Profile Options for Reports

Set the following required IBE profile options for Oracle iStore Reports:

iStore Profile Options

- IBE: Currency Code
- IBE: GL Conversion Type

- **IBE: GL Period Set Name**

You can also set the following optional profile options for Oracle iStore 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: YTD Data Availability in Bins**

See [Section A.15, "Reports Profile Options"](#), for profile option descriptions and setup procedures.

15.2.4 Set Conversion Rates

Oracle iStore can have business transactions from multiple stores, each of which can support multiple currencies. This results in the Oracle iStore Reports functionality compiling business reports from transactions in multiple currencies. These currencies must be resolved to a single currency for Oracle iStore Reports.

The Oracle iStore 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. See [Section 15.2.3, "Set iStore Profile Options for Reports"](#), for more information.
- The currency for the Data Out Bin fact tables is determined by the lookup, iStore Reporting Currencies (IBE_ECR_REPORTING_CURRENCY). See [Section 15.9, "Oracle iStore Reports Lookup Types"](#), for more information.
- The currency for the Data Out Bins is determined by the user when setting bin preferences. See [Section 15.4, "Setting Bin Preferences"](#), for more information.

Use the following 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 Oracle iStore Reports fact tables.

Prerequisites

None

Login

Oracle Forms

Responsibility

General Ledger Super User responsibility

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 Oracle iStore 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.

For more information on setting currency conversion rates, see *Oracle General Ledger User's Guide*.

15.2.5 Prepare Data (Run Concurrent Programs)

Two sets of concurrent programs populate the Oracle iStore Reports' fact tables and materialized views with data:

- **iStore Reports Complete Data Refresh Set** -- Refreshes data for entire time-frame specified; provides completely updated, accurate data, but may be very time consuming due to the amount of data refreshed.
- **iStore Reports Increment Data Refresh Set** -- Adds only data for the time period between the last data refresh and your new desired end date; much faster, but may not be accurate if the unrefreshed data has changed since it was last captured.

See below for steps on how to run these seeded concurrent program sets.

Each of these program sets contains the following three concurrent programs:

1. **iStore Reports Fact Tables Refresh** - Pulls data that is within a certain user-specified time-frame from Oracle Order Capture and Oracle Order Management data tables into the Oracle iStore fact tables, which act as data summaries.
2. **iStore Reports Materialized Views Refresh** - Refreshes materialized views of the Oracle iStore fact tables
3. **iStore Alert Reports** - Triggers delivery of the reports that are available as e-mail notifications.

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 Oracle iStore Reports data.

15.2.5.1 iStore Reports Complete Data Refresh Set

This program set refreshes data for the entire time-frame specified and provides completely updated, accurate data, but may be very time consuming due to the amount of data refreshed. If you require a less time-consuming refresh, use the **iStore Reports Increment Data Refresh Set**.

The beginning date of this program set is controlled by:

- User-entered date
- Profile option: **IBE: Quarter Begin Data**
- Profile option: **IBE: YTD Data Availability in Bins**

The table below, [Table 15–3, "iStore Reports Complete Data Refresh Set Begin Date Selection Summary"](#), summarizes how the system determines the beginning date when running the concurrent program set.

Table 15–3 iStore Reports Complete Data Refresh Set Begin Date Selection Summary

Profile: IBE:YTD Data Avail. in Bins	Profile: IBE:Quarter Begin Data	Begin Date Selection
If set to Yes	Value irrelevant if YTD Data Availability in Bins is set to Yes	System uses the earlier of the user-entered date and the first day of the current Oracle General Ledger year. Defaults to first day of the current year if user does not enter a begin date.
If set to No	If set to Yes	System uses the earlier of the user-entered date and the first day of the current Oracle General Ledger quarter. Defaults to the first day of the current quarter if user does not enter a begin date.
If set to No	If set to No	System uses the earlier of the user-entered date and the system date. Defaults to the system date if user does not enter a begin date.

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

Prerequisites

- [Section 15.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 15.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 15.2.4, "Set Conversion Rates"](#)

Login

Oracle Forms

Responsibility

iStore Concurrent Program responsibility

Steps

1. Log in to Oracle Forms with the **iStore Concurrent Program** 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 end date for the time period. If you leave this blank, it defaults to the current system date.
- d. **Conversion Rate Check:** If this is set to **Yes**, the concurrent program will abort whenever the currency rates are not maintained. The details of the missing rates would be logged in the concurrent program log files (upto a maximum of 25 missing rates). If this is set to **No**, the program will execute with "default" values for the missing conversions. By default, this parameter is set to **No**.

Select **OK** to save.

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 select **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 available e-mail reports as e-mail notifications, or **No** if you do not want to trigger the notifications. Select **OK**. The Parameters field for iStore Alert Reports is populated with the parameter.

Note: See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), 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 Oracle iStore Reports is available for report queries from the Oracle iStore Store Administration UI.

15.2.5.2 iStore Reports Increment Data Refresh Set

This program set adds only data for the time period between the last data refresh and your new end date. It is much faster than iStore Reports Complete Data Refresh Set, but may not be accurate if the unrefreshed data has changed since it was last captured.

The table below, [Table 15–4, "iStore Reports Increment Data Refresh Set Begin Date Selection"](#), summarizes how the system determines which beginning date to use when running this concurrent program set.

Table 15–4 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 Oracle iStore Reports data with the iStore Reports Increment Data Refresh Set.

Note: Unless you are in a hurry, 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.

Prerequisites

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

Login

Oracle Forms

Responsibility

iStore Concurrent Program responsibility

Steps

1. Log in to Oracle Forms with the **iStore Concurrent Program Responsibility**. The Submit a New Request window opens.
2. Choose **Request Set** and select **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.
 - c. **Conversion Rate Check:** If this is set to **Yes**, the concurrent program will abort whenever the currency rates are not maintained. The details of the missing rates would be logged in the concurrent program log files (upto a maximum of 25 missing rates). If this is set to **No**, the program will execute with "default" values for the missing conversions. By default, this parameter is set to **No**.

Select **OK** to save.

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 select **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 available e-mail reports as e-mail notifications, or No if you do not want to trigger the notifications. Select **OK**.

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

Note: See *Oracle iStore User Guide* 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 Oracle iStore Reports is available for report queries from the Oracle iStore Store Administration UI.

15.2.6 Verify Discoverer Implementation

1. If you imported the eex files using adupdeul.sh, go to Oracle Discoverer 4i Admin Edition and log in with apps user ID to validate the folders.

Example: If the apps user ID is ibe_admin, then log in to Discoverer Admin edition with this user ID and give the responsibility as iStore Administrator.

2. After you log in with the apps user ID, open the Business area, then select **View > Validate Folders** to verify the Business Area E-Commerce Report.

3. If any of the folders are not valid (database objects missing), then check if Oracle iStore Minipack 11i.IBE.M has been applied or whether import was successful.
4. Launch the Store Administration UI and select the Reports tab. Verify that all reports are viewable.

15.3 Using the Bins Dashboard

Oracle iStore Data Out Bins are available within the **Dashboard** pages under the **Reports** tab in the Store Administration UI. Oracle iStore Bins utilize the Oracle Declarative Components Framework (DCF) to present both business and operational reports. The Dashboard page displays both bins and reports, as described below.

In the left portion of the **Dashboard** page, the following bins display:

- **Store Order Summary Bin** -- See [Section 15.6.4.1, "Store Order Summary - Dashboard Bin"](#), for details about this bin.
- **Unpublished Products Bin** -- See [Section 15.7.1.6, "Unpublished Products Bin"](#), for details about this bin.
- **Unpublished Sections Bin** -- See [Section 15.7.2.5, "Unpublished Sections Bin"](#), for details about this bin.

By default, when you initially enter the **Reports > Dashboard** pages the *daily* versions of the following three Oracle iStore Dashboard reports are displayed in the center of the page:

- **Top Orders Report** --- See [Section 15.6.3, "Top N Orders Report"](#), for details about this report.
- **Top Products Report** --- See [Section 15.6.1, "Top Product Sales Report"](#), for details about this report.
- **Top Customers Report** --- See [Section 15.6.2, "Customer Sales Report"](#), for details about this report.

Reports are summarized in [Section 15.1, "Overview of Oracle iStore Reports"](#).

15.4 Setting Bin Preferences

Using bin preferences, you can configure how the Oracle iStore bins display their data. After selecting the **Edit** link at the top of a bin, you can set preferences per session or cross sessions, utilizing the following submenus:

- **Parameters** -- Use this submenu to set **session-only** preferences.
- **Personalize** -- Use this submenu to set **cross-session** preferences.

You set bin preferences for the business reporting bins differently than for the operational reporting bins. For instructions, see:

- [Section 15.4.0.1, "Setting Preferences for Business Bins"](#)
- [Section 15.4.0.2, "Setting Preferences for Operational Reports"](#)

15.4.0.1 Setting Preferences for Business Bins

This section describes the parameters available for business bin preferences.

- For step-by-step instructions on how to access the preferences screens, see [Section 15.4.0.3, "Steps to Set Bin Preferences"](#).
- For a list of business reports, see [Section 15.1.0.1, "Business Reports Overview"](#).
- Details of the business reports are presented in [Section 15.6, "Oracle iStore Business Reports Details"](#).

For the business reporting bins, you can specify the following in the **Parameters** or **Personalize** pages:

- **Default currency** --- Use this LOV to select the default currency in which the bin should display monetary data. Currencies must be set up in Oracle General Ledger before they will appear in the Store Administration UI.
- **Number of Rows** --- Use this LOV to set the default number of rows in the bin.
- **Frequency** --- Use this LOV to specify the time period for the data that the bin should display.

Remember, no matter which frequency you select, the data displayed is dependent upon the End Date of the concurrent program which last populated the data tables. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#), for additional details.

Frequency time periods are the Oracle General Ledger period types, and the data displayed will be from the start of the period containing the end date of the concurrent program to the end date itself. For example, if the End Date of the concurrent program is July 15, the month period displayed will be July 1 to July 15. See [Section 15.2.1, "Set up Calendar in General Ledger"](#).

Frequency options are:

- **Day** — Select this option to view business data from the previous one day.

- **Week** — Select this option to view business for the previous one week, (specifically, between the end date of the concurrent program and the Monday that most recently preceded it).
- **Month, Quarter, and Year** — Select these options to view the business data from the past month, quarter, or year.
- **Scaling** --- Use this LOV to set the default scaling of numerical values. To display amounts in standard format, select Tens.

15.4.0.2 Setting Preferences for Operational Reports

This section describes the parameters available for operational bin preferences.

- For step-by-step instructions on how to access the preferences screens, see [Section 15.4.0.3, "Steps to Set Bin Preferences"](#).
- For a list of operational reports, see [Section 15.1.0.2, "Operational Reports Overview"](#).
- Details of the operational reports are presented in [Section 15.7, "Oracle iStore Operational Reports Details"](#).

For the operational reports, you can set the following preferences in the **Parameters** or **Personalize** pages:

- **Maximum Number of Days** --- Use this LOV to set the maximum number of product/section creation days prior to the current date.
 - For the **Unpublished Products** bin, this means only unpublished products **created** between the current date and the current date minus the maximum number of days are displayed.
 - For the **Unpublished Section** bin, this means only unpublished sections **created** between the current date and the current date minus the maximum number of days are displayed.
- **Maximum Number of Sections/Products** --- Use these LOVs to set the maximum number of sections or products to display in the bin.
- **Title** --- Use this textbox to create your own bin title. Note that this will overwrite the current bin title. To use the seeded bin title, remove all text from the textbox.
- **Footer** --- Use this textbox to create your own bin footer. Note that this will overwrite the current bin footer. To use the seeded bin footer, remove all text from the textbox.

- **Available Columns/Displayed Columns** --- Use the column shuttle windows to set the columns which will display in the bins.

15.4.0.3 Steps to Set Bin Preferences

Use the following procedure to set bin preferences.

Prerequisites

- [Section 15.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 15.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 15.2.4, "Set Conversion Rates"](#)

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Launch the Store Administration UI and select **Reports > Dashboard**. The Dashboard page displays, with a list of bins on the left.
2. Select the **Edit** hyperlink at the top of the bin that you want to change.
3. Select **Parameters** or **Personalize** from the left submenu:
 - To change your preferences for this session only, choose **Parameters**.
 - To change your preferences and save them for future sessions, choose **Personalize**.

Note: The parameters in the Parameters submenu override those in the Personalize submenu, which in turn override the coded default parameters.
4. In the page that opens, edit the bin preferences as desired, and select **Update** to save changes. For field descriptions, use the information in:
 - [Section 15.4.0.1, "Setting Preferences for Business Bins"](#)
 - [Section 15.4.0.2, "Setting Preferences for Operational Reports"](#)

15.5 Setting up E-mail Delivery for Reports

Oracle iStore can deliver the **Top N Orders Report** and **Store Order Summary** (also known as Historical Summary Report) as e-mail notifications to persons that you designate through the **Reports > Email Reports** menu in the Store Administration UI.

For the e-mail notifications, the names of these reports change:

- Store Order Summary is the Historical Summary Report in e-mail notification form
- Top N Orders is Top 10 Orders in e-mail notification form

Both e-mail versions contain data that is identical to the report version, except that for the Historical Summary Report, only daily information is presented. For the Top N Orders report, the e-mail notification contains the top 10 orders for the previous day. The e-mail reports are delivered every time the data is refreshed and the iStore Alert Reports concurrent program is run.

The e-mail notifications utilize Oracle iStore Notification Events to deliver the report data. The Top 10 Orders Report and Historical Summary Report are seeded notification events. If you wish to alter the seeded e-mail message, you can map a new e-mail message for these notification events. See the [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#), for more information.

Use the following procedure to designate the recipients of the e-mail reports.

Prerequisites

- Set up Oracle iStore to use Oracle Workflow (See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#).)
- [Section 15.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 15.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 15.2.4, "Set Conversion Rates"](#)
- [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#)

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Log in to the Store Administration UI and select the **Reports** tab. Select the **Email Reports** subtab. The **Email Reports** page displays. The **User List for Selected Report** area shows a list of users who are already set up to receive an e-mail delivery of the report selected in the Select Report LOV.
2. Optionally, you can **turn on or off the e-mail delivery** of these reports by using the **Enable Email Reports** checkbox. If the checkbox is not active, then the reports do not get mailed. Note that this does **not** toggle any profile option value.
3. From the **Select Report** pull-down menu, select the report for which you want to designate recipients, and then select the **Go** button. The **User List for Selected Report** refreshes with a list of the current e-mail report recipients for the report which you have selected.
4. Optionally, you can delete an e-mail delivery by selecting the **Delete** icon next to the applicable row.
5. **Adding a new delivery:** To add a recipient, select **Add User** button. The **Email Preferences: Add User** page opens.
6. In the **User Name** field, enter the recipient's name.
7. In the **Email Address** field, enter the recipient's full e-mail address.
Example: john.doe@company.com
8. From the **Language** pull-down menu, select the language of the e-mail report.
9. Press the **Apply** button to save the changes.
10. The **Email Reports** page displays. To view the changes, may need to select the report again in the **Select Report** LOV and press the **Go** button.

15.6 Oracle iStore Business Reports Details

This section provides details about each business report available in Oracle iStore.

For a summary of the business reports that are available with this release, see [Section 15.1.0.1, "Business Reports Overview"](#).

- [Top Product Sales Report](#)
- [Customer Sales Report](#)
- [Top N Orders Report](#)

- [Store Order Summary Report](#)
- [Sales by Agreement Report](#)
- [Shopping Cart Conversion Report](#)
- [Sales by End User Type Report](#)

15.6.1 Top Product Sales Report

This report shows the most frequently ordered products and their sales amounts for selected time periods.

Note: Orders must be in **Booked** state before they appear in Oracle iStore reports.

The Oracle iStore Dashboard version of this report is called **Top Products**. For this report, the concurrent program captures each line item of the order. For example, a single order might have the same product appear twice, and each line will be counted in the report. Additionally, there may be other lines with different products other than the "top" products on a given order, and the order totals in this report will not reflect these.

Note: For bundle items created through Oracle Bills of Material (BOM), sales amounts are rolled up to the base model level; therefore, the user will not see any option items/option classes. Children items are rolled up into the sales amount with the parent item. Also, any non-optional components are ignored.

Note: Sales Amount totals in Oracle iStore Reports do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.

Available as:

- [Top Product Sales - Discoverer Report](#)
- [Top Products - Dashboard Report](#)

15.6.1.1 Top Product Sales - Discoverer Report

This report features the ability to rank products based on the number of times ordered and the sales amount (in currency). Rankings are provided to make the report easy to understand and analyze.

Two Discoverer worksheets within this report are available:

- **Top Product Sales Ranked by Number of Times Ordered** - Ranks products based on the number of times ordered and displays them in descending order.
In the case of bundle items created through Oracle Bills of Material, the number of times ordered does not include any option class, options, or non-optional items.
This worksheet also does not include any shipping/handling, taxes, cancelled orders, or returned orders.
- **Top Product Sales Ranked by Sales Amount** -- Ranks products based on the sales amount and displays them in descending order by highest sales amount (in currency).
In the case of bundle items created through Oracle Bills of Material, the sales amount is rolled up at the base model level.
This worksheet also does not include any shipping/handling, taxes, cancelled orders, or returned orders.

Example 15–1 Product Inclusion in Top Product Sales Report

Product A

sales total = \$5,000

lines ordered = 1

Product A = likely candidate for Top Product Sales Ranked by Sales Amount report

Product B

sales total = \$5,000

lines ordered = 50

Product B = likely candidate for Top Product Sales Ranked by Number of Times Ordered report

To retrieve either worksheet, first access the list of available reports by selecting **Reports > Discoverer Reports > Business Reports** in the Store Administration UI.

Select the **Top Product Sales Report** hyperlink, and then select the desired worksheet to display a screen where you can enter the following parameters:

- **Date range** - Use the Begin Date and End Date fields to set the date range for which to run the report. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since concurrent programs populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer Viewer 4.1.43 or

below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information on how to run the concurrent programs.

- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Top N Product** -- Using the Top N Product field, the user can set the number of products ranked by the report. Entering a 10 in this field, for example, will return the top 10 best selling products.
- **Sorting** -- Using the Sort By drop-list, the user can sort the returned data by:
 - **Number of Times Ordered** - Sorts the report by the highest number of orders for a given product for the selected time period. Cancelled and returned orders are not included in the data. Orders must be in Booked state before they appear in Oracle iStore reports.
 - **Product Name** - Sorts the report by the product names in ascending alphabetical order (a to z, with numbers and special characters first).
 - **Sales Amount** - Sorts the report by highest amounts for the selected time period. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.

Note: If the user chooses no **Sort** order, then the system will return the data in the Number of Times Ordered column or Sales Amount column in *descending* alphabetical order (z to a, with numbers and special characters last).

The figure below is an example of the Oracle Discoverer 4i version of the Top Product Sales Report input parameters screen.

Figure 15–1 Top Product Sales Report - Input Parameters - Discoverer Version Example

Begin Date	01-JAN-2000	Begin Date should be greater than or equal to Effective Begin Date
End Date	01-DEC-2002	End Date should be less than or equal to Effective End Date
Top N Product	10	Select the Top N Products based on the number of times ordered in the given time period
Currency Code	USD	Select the Currency Code
* Value Required		
Sort By	Number of Times Ordered Number of Times Ordered Number of Times Ordered Product Name Sales Amount	Sort By
Apply Parameters		

After selecting parameters, the user then presses the **Apply Parameters** button, and the system brings up the report data in table format with the following columns:

- **Percentage columns** -- The columns **Percent of Total Number of Times Ordered** and **Percent of Total Sales Amount** show how much a given product has sold as a percentage of all the products sold during the selected time period. Therefore, if a user has selected the top five products in his parameters, the percent columns will reflect those top five products in light of all products sold during the time period. Not included in the data are returned or cancelled orders.
- **Product Number** -- Displays the Product SKU or ID number from Oracle Inventory.
- **Product Name** -- Displays the Product Name as stored in Oracle Inventory.
- **Number of Times Ordered** -- Displays the number of times each product has been ordered in the selected time period.
- **Sales Amount** -- Displays the total amount of sales generated a product in a given time period. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders. Sales amount is considered to be net amount after any adjustments have been made. The currency will depend upon the currency selected for the report.

Note: Use the **Presentation Options** link to change the display preferences of the page.

The figure below is an example of the Discoverer version of the Top Product Sales Report with the data returned.

Figure 15–2 Top Product Sales Report - Data Returned - Discoverer Version Example

	Product Number	Product Name	Number of Times Ordered	Percent of Total Number of Times Ordered	Sales Amount	Percent of Total Sales Amount
1	AS66311	Vision Pad DX - Mobile Computer	78	22.48%	22,714.40	4.45%
2	CM76840	Lightning Inkjet Printer	51	14.70%	16,490.85	3.23%
3	MB21021	Envoy Deluxe	25	7.20%	71,325.75	13.97%
4	AS189471	Sentinel Deluxe Desktop	24	6.92%	60,412.99	11.83%
5	CN62441C	Create-Your-Own Sentinel System	22	6.34%	41,452.43	8.12%
6	AS54888	Sentinel Standard Desktop	18	5.19%	177,649.80	34.80%
7	AS72111	Envoy Deluxe Laptop	15	4.32%	33,463.50	6.55%
8	CP38401	3 Year Extended Warranty	13	3.75%	2,998.00	0.59%
9	CM76845	Lightning Laser Printer	12	3.46%	2,489.00	0.49%
10	CM31556	Monitor - 19" Flat	11	3.17%	8,277.84	1.62%
11	Grand Total		269	77.52%	437,274.56	85.65%

Grand totals are computed for the columns:

- Number of Times Ordered
- Percent of Total Number of Times Ordered
- Sales Amount (not including taxes or shipping/handling)
- Percent of Total Sales Amount

15.6.1.2 Top Products - Dashboard Report

This Oracle iStore Dashboard report identifies:

- Top selling products
- Number of orders per product
- Total sales amounts

Note: Orders must be in Booked state before they appear in Oracle iStore reports.

This report displays in the central area of the page when you select the **Reports** tab, and then the **Dashboard** subtab in the Store Administration UI. Information on using the bins dashboard can be found in [Section 15.3, "Using the Bins Dashboard"](#).

The Top Products in the Dashboard page displays the following columns:

- **Product** -- Displays a list of the top selling products.
- **Order Lines** -- Displays the number of orders for the product. Returned and cancelled orders are not included.
- **Sales** -- Displays the total amount of the sales for the product. Taxes and shipping/handling charges are not included.

The figure below is an example of the Oracle iStore Dashboard version of the Top Products Report.

Figure 15-3 Top Products Report - Oracle iStore Dashboard Example

Daily report: Top Products		Fri Nov 15	
This report displays Top Products by sales amount.			
Product	Order Lines	Amount (EUR)	
Sentinel Standard Desktop	4	139,494	
Sentinel Deluxe Desktop	9	21,363	
Envoy Standard Laptop	3	15,246	
Envoy Deluxe	6	14,257	
Envoy Deluxe Laptop	6	11,960	
Lightning Inkjet Printer	27	9,172	
Envoy Ambassador Laptop	4	7,806	
Sentinel Custom Desktop	3	5,410	
Vision Pad DX - Mobile Computer	11	4,913	
Monitor - 19" Flat	4	2,660	
Amount is scaled as: No Decimal			

15.6.2 Customer Sales Report

The Customer Sales Report allows you to identify your top customers in terms of sales figures. The Oracle iStore Dashboard Reports version of this report is called Top Customers.

This report also allows you to run reports using **Customer Classes**. Customer Classes are categories for customers that you define in Oracle Receivables. You can choose to classify your customers by industry, location, or size. You must first set up

these customer classes in Oracle Receivables. See the *Oracle Receivables User Guide* for details.

Available as:

- [Customer Sales - Discoverer Report](#)
- [Top Customers - Dashboard Report](#)

15.6.2.1 Customer Sales - Discoverer Report

This report shows historical sales totals as:

- Total amount (in currency) to a customer or a Customer Class.
- Total number of orders to a customer or Customer Class.
- Statistical percentages that indicate the performance of a particular customer or Customer Class against that of all customers.

Note: Sales Amount totals in Oracle iStore Reports do not include:

- Taxes
- Shipping/handling charges
- Cancelled orders
- Returned orders

Also, orders must be in Booked state before they appear in Oracle iStore reports.

Retrieve this report by selecting **Reports > Discoverer Reports** in the Store Administration UI. In the Business Reports table, select the **Customer Sales Report** worksheet to bring up the input parameters screen with the following options:

- **Date range** - Set the date range for which to run the report. Use the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Customer Class** - Select one or multiple pre-defined Customer Classes previously set up in Oracle Receivables. UNASSIGNED means customers who are not assigned to a Customer Class.

Note: If you do not make a selection in this field, report returns data across all Customer classes.

- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
 - **Sales Amount** -- Sorts the report by total sales amount for the selected time period. Taxes and shipping/handling charges are not included.
 - **Average Sales Amount** -- Sorts the output by average size of transaction.
 - **Number of Orders** -- Sorts the report by number of orders. Cancelled and returned orders are not included.

Note: If you make no selection in the Sort By drop-list, then the report defaults to doing a sort on the Customer Class column.

The figure below is an example of the Discoverer version of the Customer Sales Report, where the user can select parameters on which to return the data.

Figure 15–4 Customer Sales Report - Input Parameters - Discoverer Version Example

Begin Date	01-JAN-2000	Begin Date should be greater than or equal to Effective Begin Date
End Date	01-DEC-2002	End Date should be less than or equal to Effective End Date
*Customer Class	All Unassigned Financial Services Funding Source Government To select multiple items, hold down the Ctrl key. * Value Required	Select the customer class
Currency Code	USD	Select the Currency Code
	* Value Required	
Sort By	Average Sales Amount Average Sales Amount Number of Orders Sales Amount	Sort By
Apply Parameters		

After making parameter selections, the user selects the **Apply Parameters** button to retrieve the report with the following columns:

- **Customer Class** -- Displays the customer class(es) selected in the input parameters screen.
- **Customer Name** -- Displays the customer name, which is based on the Bill to customer record.
- **Number of Orders** -- Displays the number of orders the customer has placed for the selected time period. Returned and cancelled orders are not considered in the data.
- **Percent of Total Number of Orders** -- The percentage figure represents the number of orders that a given customer (shown in Customer Name column) has placed in relation to the total number of orders placed during the selected time period.

- **Sales Amount** -- Displays the total amount of sales for the customer for the selected time period. Sales amount does not include shipping/handling or taxes.
- **Percent of Total Sales Amount** --The percentage figure represents the sales amount of the customers' orders in relation to total sales for all orders during the selected time period.
- **Average Sales Amount** -- Displays the average sales amount for orders placed by the customer for the selected time period.

Drill Up/Down Feature in Customer Sales Report: The Drill Up/Down feature allows you to roll data up for a summary view of order totals at the Customer Class-level, or drill down to see data at the individual customer level.

The figure below is an example of the Discoverer version of the Customer Sales Report with the customer sales data displayed.

Figure 15–5 Customer Sales Report - Data Returned - Discoverer Version Example

	Customer Class	Customer Name	Number of Orders	Percent of Total Number of Orders	Sales Amount	Percent of Total Sales Amount	Average Sales Amount
1	Unassigned	Chuck Adams	8	4.23%	186,272.69	36.33%	23,284.09
2	Unassigned	Joe Scott	1	0.53%	5,149.95	1.00%	5,149.95
3	Unassigned	B2b Org	1	0.53%	2,663.79	0.52%	2,663.79
4	Unassigned	Ace Communications	2	1.06%	5,300.28	1.03%	2,650.14
5	Unassigned	july25 ExpiredCart	1	0.53%	2,430.72	0.47%	2,430.72
6	Unassigned	audrey kaplan	1	0.53%	2,279.05	0.44%	2,279.05
7	Unassigned	Sunil Srivastava	1	0.53%	2,108.04	0.41%	2,108.04
8	Unassigned	Tom Jones	14	7.41%	27,325.92	5.33%	1,951.85
9	High Technology	Business World	65	34.39%	125,883.64	24.55%	1,936.67
10	Unassigned	Chris Amith	10	5.29%	19,247.79	3.75%	1,924.78
11	Unassigned	Elena Avesani	38	20.11%	73,127.70	14.26%	1,924.41
12	Unassigned	Mike Davis	11	5.82%	20,804.81	4.06%	1,891.35
13	Unassigned	Francesca Noli	2	1.06%	3,594.24	0.70%	1,797.12

Grand totals are computed for the columns:

- Number of Orders

- Percent of Total Number of Orders
- Sales Amount
- Percent of Total Sales Amount
- Average Sales Amount

15.6.2.2 Top Customers - Dashboard Report

The Oracle iStore Reports Dashboard bin version of this report is a high-level, summary view of customer sales totals featuring drill-down capability on Customer Name.

This report displays in the central area of the page when you select the **Reports > Dashboard** in the Store Administration UI. You set display preferences for this report by selecting the **Edit** link at the top of the Store Order Summary bin. See [Section 15.4, "Setting Bin Preferences"](#), for instructions. Information on using the bins dashboard can be found in [Section 15.3, "Using the Bins Dashboard"](#).

The Top Customers Report in the Dashboard page displays the following columns:

- **Customers** -- The customers with the highest sales numbers appear in drill-down fashion. Drilling down on this field returns a list of the top orders for that customer. You can further drill down into order details. An example of the drill down into order details can be seen in [Figure 15–10, "Top Orders Report - Drill-down to Order Details Example"](#).
- **Orders** -- Displays the total number of orders for a customer. Returned and cancelled orders are not included in the totals. Orders must be in Booked state before they appear in Oracle iStore reports.
- **Amount** -- Displays the total amount of the sales for a customer. Shipping/handling and taxes are not included.

The figure below is an example of the Data Out Bin version of the Customer Sales Report.

Figure 15–6 Top Customers Report - Oracle iStore Dashboard Example

Daily report: Top Customers			Fri Nov 15
This report displays Top Customers by sales amount.			
Customer	Orders	Amount (EUR)	
Chuck Adams	8	166,155	
Tom Jones	14	24,375	
Mike Davis	11	18,558	
Chris Amith	10	17,169	
Teresa Mark	10	15,776	
Amount is scaled as: No Decimal			

15.6.3 Top N Orders Report

This report summarizes top orders by operating unit. Data returned is the last capture date of the concurrent program set.

Note: Orders must be in Booked state before they appear in Oracle iStore reports.

Available as:

- [Top N Orders - Discoverer Report](#)
- [Top Orders - Dashboard Report](#)
- [Top 10 Orders - E-mail Notification](#)

15.6.3.1 Top N Orders - Discoverer Report

This report shows the top orders by all stores within a single operating unit or multiple operating units, if more than one operating unit has been implemented.

To retrieve the report, first access the list of available reports by selecting **Reports > Discoverer Reports > Business Reports** in the Store Administration UI. Select the **Top N Orders Report** hyperlink to bring up a screen where you can enter the following parameters:

- **Date range** -- Use the Begin Date and End Date fields to set the date range for which to run the report. Use the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report.

See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information on running the concurrent programs.

- **Operating Unit** -- Select one, multiple, or all operating units from the list. (Hold down the Ctrl key while selecting to select more than one operating unit).

Note: If the user does not select an operating unit in this field, then the data is returned across all operating units.

- **Top N Orders** -- Using the Top N Orders field, the user can set the number of top selling orders that the report should return. Entering a 10 in this field, for example, will return the top 10 best orders by amount.
- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting** -- Using the Sort By drop-list, the user can sort the returned data by:
 - **Customer Name** -- Sorts the report by the customer names in alphabetical order.
 - **Sales Amount** -- Sorts the report by highest sales amounts for the selected time period. Sales Amount totals in Oracle iStore Reports do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
 - **Order Number** -- Sorts the report by the unique Order Number given to the order when the order is placed.

Note: If the user chooses no **Sort** order, then the system will return the data on Sales Amount in *descending* order.

The figure below is an example of the Discoverer version of the Top N Orders Report input parameters screen.

Figure 15–7 Top N Orders Report - Input Parameters - Discoverer Version Example

Begin Date	01-JAN-2002	Begin Date should be greater than or equal to Effective Begin Date
End Date	31-MAY-2002	End Date should be less than or equal to Effective End Date
* Operating Unit	All Unassigned Vision Communications (USA) Vision Industries Vision Operations To select multiple items, hold down the Ctrl key.	Select the Operating Unit for which you wish to run the report
* Value Required		
Top N Orders	10	Select the Top N number for the report.
Currency Code	USD	Select the Currency Code
* Value Required		
Sort By	Customer Name Customer Name Order Number Sales Amount	Sort By
Apply Parameters		

After selecting parameters, the user then clicks the **Apply Parameters** button, and the system brings up the report data in table format with the following columns:

- **Order Number** -- Unique Order Number given to the order when the order is placed.
- **Customer Name** - Displays the customer name that is associated with the orders returned.
- **Sales Amount** - Displays the total sales value of the order. Sales Amount totals in do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Operating Unit** - Displays the operating unit.

The figure below is an example of the Discoverer version of the Top N Orders Report.

Figure 15–8 Top N Orders Report - Data Returned - Discoverer Version Example

	Order Number	Customer Name	Sales Amount	Operating Unit
1	85038	Ace Communications	2,650.14	Vision Communications (USA)
2	85040	Ace Communications	2,650.14	Vision Communications (USA)
3	10362	audrey kaplan	2,279.05	Vision Operations
4	10372	Business World	4,891.54	Vision Operations
5	10345	Business World	4,829.77	Vision Operations
6	10367	Business World	3,734.63	Vision Operations
7	10349	Business World	2,279.05	Vision Operations
8	10371	Business World	1,859.15	Vision Operations
9	10363	Elena Avesani	2,564.05	Vision Operations
10	10364	Elena Avesani	1,700.50	Vision Operations
11			Grand Total: 29,438.02	

The grand total is computed on the Sales Amount column, which does not include taxes, shipping/handling, returned or cancelled orders.

15.6.3.2 Top Orders - Dashboard Report

The Oracle iStore Dashboard version of this report offers a summary view of the top orders by sales amount.

This report displays in the central area of the page when you select the **Reports** tab, and then the **Dashboard** subtab in the Store Administration UI. Information on using the bins dashboard can be found in [Section 15.3, "Using the Bins Dashboard"](#).

The data retrieved is for all operating units and specialty stores. You cannot run the report on specific operating units or stores. Data is current as of the last day that the concurrent program set was run. The Top Orders Report in the Dashboard page includes the following columns:

- **Order Number** -- This column is a drill-down field that allows the user to view order details, including:
 - Order number
 - Purchase order number
 - Order total

- Customer name
- Shipping details
- Payment terms
- Date submitted
- Shipping and billing address details
- Products and quantity ordered
- **Customers** -- This column shows the name of the customer associated with the order number displayed in the Order column.
- **Sales** -- This column shows the total amount of sales (in currency) for the last day that the concurrent program set was run. Sales Amount totals do not include: taxes or shipping/handling charges. Cancelled and returned orders are not considered for the data.

The figure below is an example of the Top N Orders Report Data Out Bin.

Figure 15–9 Top Orders Report - Oracle iStore Dashboard Example

Daily report: Top Orders		Fri Nov 15
This report displays Top Orders by sales amount.		
Order Number	Customer	Amount (EUR)
10587	Chuck Adams	143,842
10583	Chuck Adams	9,350
10586	Tom Jones	5,336
10589	Chuck Adams	4,663
10577	Tom Jones	4,142
10572	Tom Jones	4,045
10568	Mike Davis	3,531
27	Teresa Mark	3,238
50	Tom Jones	3,209
10563	Teresa Mark	3,024
Amount is scaled as: No Decimal		

The Order Number column in the Top Orders bin is a drill-down field that allows the user to see order details, as shown in the following example:

Figure 15–10 Top Orders Report - Drill-down to Order Details Example

Order Details for Order Number 600017				
Order Number: 600017				
Reference Number:				
Web Confirmation Number:				
PO Number:				
Line Total: \$5,600.00				
Total Charges(total shipping+other charges): \$5,600.00				
Tax Total: \$5,600.00				
Order Total: \$5,600.00				
Shipment Priority:				
Payment Terms: 2/10 , Net 30				
Freight Terms: Prepaid				
Order Status: ENTERED				
Shipments: Details				
Shipping Addresses		Billing Address		
Piazza IV Febbraio, 12bis		Piazza IV Febbraio, 12bis		
Milano, ITALIA 20099 ,IT		Milano, ITALIA 20099 ,IT		
Product	Qty Ordered	Unit Selling Price	Line Total	Shipments
Sentinel Standard Desktop	3	\$5,600.00	Items \$5,600.00	Details
			Total \$5,600.00	

15.6.3.3 Top 10 Orders - E-mail Notification

Leveraging a seeded Oracle iStore Notification Event, the e-mail notification provides the top 10 orders for the most recent day that the concurrent program was run. Note that the e-mail version of this report supports only *daily* order information, not weekly, monthly, etc.

This e-mail is delivered to users that you designate in the **Reports > Email Reports** pages. See [Section 15.5, "Setting up E-mail Delivery for Reports"](#), for instructions on setting up e-mail recipients.

15.6.4 Store Order Summary Report

Using several different time segments derived from the Oracle General Ledger Sales Calendar, this report summarizes:

- Number of orders

- Total sales amount (in currency) of all orders

Note: Orders must be in Booked state before they appear in Oracle iStore reports.

The data retrieved is for all operating units and specialty stores. You cannot run the report on specific operating units or stores.

Available as:

- [Store Order Summary - Dashboard Bin](#)
- [Store Order Summary - E-mail Notification](#)

15.6.4.1 Store Order Summary - Dashboard Bin

This bin displays on the left side of the **Dashboard** page, accessible by selecting **Reports > Dashboard** in the Store Administration UI. By setting bin preferences, you can choose to display information in this bin by day, week, month, quarter, or year. See [Section 15.4.0.1, "Setting Preferences for Business Bins"](#), for details.

For information on working with the Dashboard page, see [Section 15.3, "Using the Bins Dashboard"](#).

The Store Order Summary bin summaries order information for your stores and includes the following columns:

- **For** -- Contains drill-down fields which are time periods -- Day, Week, Month, Quarter, and Year -- determined by the Oracle General Ledger Sales Calendar. Drilling down into one of the time periods will retrieve a detail page which lists the top orders for that time period.
- **Sales** -- Displays the total amount of sales (in currency) for the corresponding time period. Sales amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Orders** -- Displays the number of orders for the corresponding time period. Cancelled and returned orders are not considered in the data.

Remember, the data is current as of the last day that the concurrent program set was run. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#), for additional information.

The figure below is an example of the Store Order Summary bin.

Figure 15–11 Store Order Summary Bin - Oracle iStore Dashboard Example

Store Order Summary		Edit
For	Orders	Sales
Day	1	237
Week	1	237
Month	10	15,400
Quarter	10	15,400
Year	128	222,609
Amount is in USD and scaled as: No Decimal		
Last refreshed on 21-OCT-2002 09:16:08		

15.6.4.2 Store Order Summary - E-mail Notification

Note that in the **Notifications** pages, this e-mail report displays as **Historical Order Summary**. Leveraging a seeded Oracle iStore’s Notification Event, the e-mail notification contains information identical to the bin version, but is delivered via e-mail to users that you designate in the **Reports > Email Reports** menu.

See [Section 15.5, "Setting up E-mail Delivery for Reports"](#), for instructions on setting up e-mail recipients.

15.6.5 Sales by Agreement Report

This Discoverer report summarizes orders made through pricing agreements set up in Oracle Order Management’s Basic Pricing module. Selected by customers during the ordering process, pricing agreements become part of the order which is sent into the Oracle Order Management system.

Note: Orders must be in Booked state before they appear in Oracle iStore reports.

The Sales by Agreement Report shows sales segmented by pricing agreements. Retrieve this report by selecting **Reports > Discoverer Reports > Business Reports** in the Store Administration UI.

In the Business Reports table, select the **Sales by Agreement Report** hyperlink to bring up the input parameters screen with the following options:

- **Date range** -- Set the date range for which to run the report. Use the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default

dates and show the report. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Agreement Name** -- Select one, multiple or all pre-defined customer agreements set up in Oracle Order Management's Basic Pricing module. UNASSIGNED means sales not assigned to a pricing agreement. (Hold down the Ctrl key to select more than one.)
- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
 - **Sales Amount** - Sorts the report in descending order by sales amount (in currency).
 - **Agreement Name** -- Sorts the report by agreement name.

Note: If the user chooses no **Sort** order, then the system will sort the data on Agreement Name.

The figure below is an example of the Discoverer version of the Sales by Agreement Report, where the user can select report parameters.

Figure 15–12 Sales by Agreement Report - Input Parameters - Discoverer Version Example

Begin Date	01-JAN-2002	Begin Date should be greater than or equal to Effective Begin Date
End Date	31-MAY-2002	End Date should be less than or equal to Effective End Date
*Agreement Name	All Unassigned Business World -- VPA Business World Agreement Business World Standard Agreement To select multiple items, hold down the Ctrl key.	Select the Agreement Name
	* Value Required	
Currency Code	USD	Select the Currency Code
	* Value Required	
Sort By	Agreement Name Agreement Name Sales Amount	Sort By
Apply Parameters		

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Agreement Name** -- Displays the pricing agreements names.
- **Customer Name** -- Displays the customer name(s) associated to the pricing agreements. This is the Bill to customer record.
- **Number of Orders** -- Displays the number of orders placed against the selected agreement(s). Cancelled and returned orders are not considered for the data.
- **Percent of Total Number of Orders** -- Displays a percentage that reflects the number of orders placed against a particular pricing agreement as compared to all orders placed during the selected time period.
- **Sales Amount** -- Displays the total sales amount for a particular pricing agreement. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.

- **Percent of Total Sales Amount** -- Displays a percentage that reflects the total sales against a particular pricing agreement as it relates to all sales for the given time period.
- **Average Sales Amount** -- Displays the average order value placed against the selected pricing agreement.

The figure below is an example of the Discoverer version of the Sales by Agreement Report with the customer agreement data displayed.

Figure 15–13 Sales by Agreement Report - Data Returned - Discoverer Version Example

	Agreement Name	Customer Name	Number of Orders	Percent of Total Number of Orders	Sales Amount	Percent of Total Sales Amount	Average Sales Amount
1	Business World Standard Agreement	Business World	2	6.90%	3,991.13	7.58%	1,995.56
2	Unassigned	Ace Communications	2	6.90%	5,300.28	10.06%	2,650.14
3	Unassigned	Business World	14	48.28%	27,768.45	52.72%	1,983.46
4	Unassigned	Deep Sethi	1	3.45%	237.49	0.45%	237.49
5	Unassigned	Elena Avesani	2	6.90%	4,264.55	8.10%	2,132.28
6	Unassigned	Joe Warner	4	13.79%	6,076.20	11.54%	1,519.05
7	Unassigned	Robert Green	1	3.45%	1,519.05	2.88%	1,519.05
8	Unassigned	audrey kaplan	1	3.45%	2,279.05	4.33%	2,279.05
9	Unassigned	bulent cinarkaya	2	6.90%	1,234.96	2.34%	617.48
10	Grand Total		29	100.00%	52,671.16	100.00%	1,816.25

Grand totals are computed for the following columns:

- Number of orders
- Percent of Total Number of Orders
- Sales Amount
- Percent of Total Sales Amount
- Average Sales Amount

Drill Up/Down Feature in Sales by Agreement Report: The Drill Up/Down feature allows you to roll data up for a summary view of order totals at the Agreement level, or drill down to see data at the individual customer level.

15.6.6 Shopping Cart Conversion Report

This Discoverer report shows the number of times that a product has been placed into shopping carts and the number of times those products have been converted into orders. The conversion figure is then represented as a percentage.

Note: Orders must be in Booked state before they appear in Oracle iStore reports.

Two worksheets of the Shopping Cart Conversion Report are available:

- Products Ordered Versus In Cart Ratio for Top Ordered Products
- Products Ordered Versus In Cart Ratio for Top in Cart Products

Note: For bundle items created through Oracle Bills of Material (BOM), totals are rolled up to the base model level. Option class, options, and the configured items are not counted in the number of times ordered totals.

Retrieve this report by selecting **Reports > Discoverer Reports > Business Reports** in the Store Administration UI. Select the **Shopping Cart Conversion Report** hyperlink and then the desired worksheet hyperlink to bring up the input parameters screen with the following options:

- **Date range** - Using the Begin Date and End Date fields, the user can set the date range for which to run the report. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Top N Products** -- Allows users to enter the number of products for which to run the report.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
 - **Number of Times Ordered** -- Sorts the report by number of orders.
 - **Number of times Placed in Cart** -- Sorts the report by the number of times a product was placed in a cart.
 - **Product Name** -- Sorts the report by product name.

Note: If the user chooses no **Sort** order when running either sub-report, then the system will return the data in the Number of Times Ordered column or Number of Times Placed in Cart column in *descending* order.

The figure below is an example of the Discoverer version of the Shopping Cart Conversion Report, where the user can select report parameters.

Figure 15–14 Shopping Cart Conversion Report - Input Parameters - Discoverer Version Example

Begin Date	01-JAN-2002	Begin Date should be greater than or equal to Effective Begin Date
End Date	31-MAY-2002	End Date should be less than or equal to Effective End Date
Top N Products	10	Select the top N Products based on how many times the products was ordered
Sort By	Conversion Ratio Conversion Ratio Conversion Ratio Number of Times Ordered Number of Times Placed in Cart Product Name	Sort By
Apply Parameters		

After making his selections, the user then selects **Apply Parameters** to view the report data with the following columns:

- **Product Number** -- Displays the product SKU or ID number from Oracle Inventory.
- **Product Name** -- Displays the product name.
- **Number of Times Placed in Cart** -- Displays the number of times a product has been placed into shopping carts.
- **Number of Times Ordered** -- Displays the number of times a product has been ordered. Returned and cancelled orders are eliminated from the totals.
- **Ordered versus Placed in Cart Ratio** - Displays the percent of times a product has been ordered versus the times it has been placed into shopping carts.

The figure below is an example of the Discoverer version of the Shopping Cart Conversion Report with data returned.

Figure 15–15 Shopping Cart Conversion Report - Data Returned - Discoverer Version Example

	Product Number	Product Name	Number of Times Placed in Cart	Number of Times Ordered	Ordered versus Placed in Cart Ratio
1	AS54888	Sentinel Standard Desktop	18	14	77.78%
2	AS66311	Vision Pad DX - Mobile Computer	16	10	62.50%
3	CM76840	Lightning Inkjet Printer	8	3	37.50%
4	AS72111	Envoy Deluxe Laptop	15	5	33.33%
5	CN62441C	Create-Your-Own Sentinel System	9	2	22.22%
6	CN92777	Sentinel Custom Desktop	40	4	10.00%
7	AS189471	Sentinel Deluxe Desktop	10	1	10.00%
8	CP38401	3 Year Extended Warranty	1	0	0.00%
9	EAB20	Basic Internet Access	1	0	0.00%
10	WHPT000	Dedicated Web Hosting	3	0	0.00%
11	TM10005	Wireless Connect Model	3	0	0.00%
12	Grand Total		124	39	31.45%

Grand totals are computed on the following columns:

- Number of Times Placed in Cart
- Number of Times Ordered
- Number of Times Ordered Versus Placed in Cart Ratio

15.6.7 Sales by End User Type Report

The Sales by End User Type Report allows you to view order information for operating units and sort that information by end user type (organization-B2B or person-B2C), number of orders, and sales amounts. Orders must be in Booked state before they appear in Oracle iStore reports.

Retrieve this report by selecting **Reports > Discoverer Reports > Business Reports** in the Store Administration UI. In the Business Reports table, select **Sales by End User Type** hyperlink to bring up the input parameters screen with the following options:

- **Date range** - Using the Begin Date and End Date fields, the user can set the date range for which to run the report. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 15.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Operating Unit** -- Select one, several, or all operating units. (Hold down the Ctrl key while selecting to select more than one.)

Note: If no Operating Unit is selected, then the report will return data for all operating units.

- **Select User Type:** Select Person (B2C), Organization (B2B), or All.

Note: If no User Type is selected, then the report will return data for all user types.

- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
 - **Number of Orders** -- Sorts the report by number of orders.
 - **Sales Amount** -- Sorts the report the Sales Amounts.
 - **User Type** -- Sorts the report by user type.

Note: If the user chooses no **Sort** order when running this report, then the system will sort on Number of Orders in *descending* order.

The figure below is an example of the Discoverer version of the Sales by End User Type Report, where the user can select report parameters.

Figure 15-16 Sales by End User Type - Input Parameters - Discoverer Version Example

Begin Date	01-JAN-2002	Begin Date should be greater than or equal to Effective Begin Date
End Date	31-MAY-2002	End Date should be less than or equal to Effective End Date
* Operating Unit	All Unassigned Vision Communications (USA) Vision Industries Vision Operations To select multiple items, hold down the Ctrl key.	Select the Operating Unit you would like information on
* Value Required		
* User Type	All Organization Person To select multiple items, hold down the Ctrl key.	Select the type of users you would like to run the report on
* Value Required		
Currency Code	USD	Select the Currency Code
Sort By	Number of Orders Number of Orders Sales Amount User Type	Sort By
Apply Parameters		

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Operating Unit** -- Displays the Operating Unit within which the orders were placed.
- **User Type** -- Displays the type of user, either Person (B2C) or Organization (B2B).
- **Number of Orders** -- Displays the number of orders attributed to the user type within organization(s) during the selected time period. Cancelled and returned orders are not considered in the data.

- **Percent of Total Number of Orders** -- Displays the percentage of orders as a percentage of total orders for the given organization(s) for the selected time period.
- **Sales Amount** -- Displays the amount (in currency) totals attributed to the user type for a given organization(s) within the selected time period. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Percent of Total Sales Amount** -- Displays the percentage of total sales (excluding tax and shipping/handling) as percentage of total sales of a given organization within the selected time period.

The figure below is an example of the Discoverer version of the Sales by User Type Report.

Figure 15-17 Sales by End User Type Report - Data Returned - Discoverer Version Example

	Operating Unit	User Type	Number of Orders	Percent of Total Number of Orders	Sales Amount	Percent of Total Sales Amount
1	Vision Communications (USA)	Organization	2	6.90%	5,300.28	10.06%
2	Total		2	6.90%	5,300.28	10.06%
3	Vision Operations	Organization	16	55.17%	31,759.58	60.30%
4		Person	11	37.93%	15,611.30	29.64%
5	Total		27	93.10%	47,370.88	89.94%
6	Grand Total		29	100.00%	52,671.16	100.00%

Grand totals are computed for every organization on the following columns:

- Number of Orders
- Percent of Total Number of Orders
- Sales Amount
- Percent of Total Sales Amount

Additionally, grand totals are provided for the above columns at the end of the report.

15.7 Oracle iStore Operational Reports Details

This section describes the operational reports and data out bins that are available for the Oracle iStore product catalog and section hierarchy, and discusses concepts and rules related to these reports or bins.

Topics include:

- [Section 15.7.1, "Product Reports and Bins"](#)
- [Section 15.7.2, "Sections Reports and Bins"](#)

15.7.1 Product Reports and Bins

This section provides specific details about each of the product reports and bins.

Several important rules about the product reports' integration with Oracle Inventory are discussed in [Section 15.7.1.1, "Product Reports and Oracle Inventory Setup"](#).

The following are the product reports or bins available:

- **Unassigned Products** --- This report lists products not assigned to any section. Both published and unpublished products are reported. See [Section 15.7.1.2, "Unassigned Products Report"](#).
- **Assigned Products** --- This report lists products assigned to at least one section. Both published and unpublished products are reported. See [Section 15.7.1.3, "Assigned Products Report"](#).
- **Products by Store Report** --- This report displays products assigned to at least one section by store. See [Section 15.7.1.4, "Products by Store Report"](#).
- **Products Excluded by Store Report** --- This report lists products explicitly excluded from one or many store(s). See [Section 15.7.1.5, "Products Excluded by Store Report"](#).
- **Unpublished Products** --- This bin lists Unpublished products created within a specific time period. See [Section 15.7.1.6, "Unpublished Products Bin"](#).

15.7.1.1 Product Reports and Oracle Inventory Setup

The following rules or guidelines apply to the product reports' integration with Oracle Inventory:

1. For all product reports, the Inventory Organization is a parameter, as defined by the profile option, **IBE: Item Validation Organization**. See [Section 6.3.1](#),

["Products Retrieved From a Single Inventory Organization"](#), for more information.

2. Oracle iStore only supports products having the **Web Status** (item Inventory flag) set to Published or Unpublished. Therefore, product reports always include only products having the web status set to those values; the reports will not include items having the Web Status set to Disabled or null. See [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#), for more information.
3. The product reports make no distinction for items based on their **Orderable on the Web** status. See [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#), for more information.
4. For configurable products (Assemble to Order Configuration), during the order processing, a new item is created during the order execution.

Example: AT68331*109 – Envoy Assemble to Order

This inventory item is a configuration that will be never exposed in the Store Administration UI product functionality. Therefore, this type of item will not be exposed in the product reports. However, the base model may still appear in the products reports.

5. The profile option, **IBE: Category Set**, determines which Inventory category set's products are available for reporting purposes. See [Section 6.3, "Guidelines and Considerations for Oracle iStore Product Setup"](#), and [Section 6.3.2, "Inventory Categories and the iStore Product Catalog"](#), for more information.
6. Product field names in Oracle iStore are not an exact match with the Oracle Inventory forms field names. See [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for more information.

15.7.1.2 Unassigned Products Report

This Discoverer report displays products not assigned to any section and created in a given date range. Users can filter products by combining different selection criteria such as product number or name, category code/name or published status. This report may be useful to a store manager who wishes to:

1. Find newly created products which have not yet been assigned to any section.
2. Find all unpublished or published products that are unassigned to a section.

This report doesn't show any pricing information. If a product is not priced, the product will still show up in the report.

Category code/category description parameters are restricted by the category set defined in the IBE: Category Set profile option.

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Product Exceptions** hyperlink and then the **Unassigned Products** hyperlink.

Selecting the **Unassigned Products** hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Product Creation Date Range** - Using the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the date range for product creation. All products having a creation date lesser than or equal to the creation date end are selected. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.
- **Published Product** --- This LOV allows you to filter products by their Published/Unpublished status (equal to the Web Status flag in Oracle

Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Category Description Ascending):
 - Creation Date
 - Category Description
 - Product Number
 - Product Name

For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–18 Unassigned Products Report - Input Parameters - Discoverer Version Example

Inventory Organization	Vision Operations	
Creation Date Begin	01/JAN/1999	Enter begin date for creation date range
Creation Date End	31/DEC/2002	Enter end date for creation date range
Product Number	☐ Exact: ☒ Starts with: ☐ Contains:	
Product Name	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Code	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Description	☐ Exact: ☒ Starts with: ☐ Contains:	
Published Product	All	
Sort By	Category Description Ascending	
Apply Parameters		

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following sortable columns:

- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.

The following figure is an example of the data returned screen for this report.

Figure 15–19 Unassigned Products Report - Data Returned - Discoverer Version Example

	Creation Date	Category Description	Product Number	Product Name	Published Product
1	18/JUL/2000	Accessory Item	CP40001	Toner Cartridges - Printer Model X11	Yes
2	18/JUL/2000	Accessory Item	CP40002	Toner Cartridges - Printer Model Y12	Yes
3	09/FEB/2000	Miscellaneous	OC00020	'C' Software	Yes
4	09/FEB/2000	Miscellaneous	CN00003	10 Drive Rack Chassis - Raid Subsystem	Yes
5	09/FEB/2000	Miscellaneous	CM00060	10 ft RS232 Cable with F/F & 9F/25F Adapters	Yes
6	25/JAN/2001	Miscellaneous	CM51000	100 MM Processed Wafer	Yes
7	25/JAN/2001	Miscellaneous	CM50000	100 MM Raw Wafer	Yes
8	20/SEP/2000	Miscellaneous	CM10008	1000 GIG MEMORY	Yes
9	02/JAN/2002	Miscellaneous	XNC19	1000 mins of wireless service	Yes
10	09/FEB/2000	Miscellaneous	CM00043	100k Cable Modem	Yes
11	09/FEB/2000	Miscellaneous	CM00073	1024 X 768 Graphics Processor	Yes
12	09/FEB/2000	Miscellaneous	CM00063	10ft SCSI2 F/W Adapt to DSxx0 Cable	Yes
13	09/FEB/2000	Miscellaneous	CM00010	128 MB DIMM	Yes
14	10/FEB/2000	Miscellaneous	CM00035	12GB 4mm Tape Drive	Yes
15	09/FEB/2000	Miscellaneous	CM00040	16X CD Writer	Yes
16	09/FEB/2000	Miscellaneous	CM00023	18.2 GB Disk @ 10000 RPM	Yes
17	09/FEB/2000	Miscellaneous	CM00011	19 Inch Rack - Empty	Yes
18	09/FEB/2000	Miscellaneous	OC00008	1GB DIMM	Yes
19	09/FEB/2000	Miscellaneous	CN00004	20 Drive Rack Chassis - RAID Subsystem	Yes
20	09/FEB/2000	Miscellaneous	CM00064	20ft SCSI2 Wide Disk Store to Disk Store Cable	Yes
21	09/FEB/2000	Miscellaneous	CM00017	220 V Power Supply Type - France	Yes
22	09/FEB/2000	Miscellaneous	CM00026	256 MB DIMM	Yes
23	09/FEB/2000	Miscellaneous	CM00027	2GB DIMM	Yes

15.7.1.3 Assigned Products Report

This Discoverer report displays products that are already assigned to at least one section. Users can filter products by different criteria, such as the product number or name or creation date range, category code/description and product publish status.

This report may be useful to a store manager who wishes to:

1. Find all products assigned to a section but in unpublished status.
2. List products from a specific categories assigned to at least one section (either published or unpublished products).

Note: There may be cases where a product is assigned to a section, but this section is not assigned to any store, and/or has a publish flag set to Unpublished. In that case,

the product will still appear in the this report. The Assigned Products Report lists products assigned to sections, but doesn't check if the sections are ultimately published or assigned to a store (however, this can be checked with section reports).

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Product Exceptions** hyperlink and then the **Assigned Products** hyperlink.

Selecting the **Assigned Products** hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Product Creation Date Range** --- Using the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the date range for product creation. All products having a creation date lesser than or equal to the creation date end are selected. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.
- **Published Product** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle

Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.

- **Section Assignment** --- This mandatory field allows the user to show or not section assignments based on the validity of the product start and end date for that section. Values are:
 - **Current** -- This value will retrieve only section assignments for which the system date is within the product start and end date.
 - **Not Current** -- This value will retrieve only section assignments for which the system date is not within the product start and end date.
 - **All** --- This value will display section assignments without any criteria on product start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Ascending):
 - Creation Date
 - Category Description
 - Product Number
 - Product Name

For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–20 Assigned Products Report - Input Parameters - Discoverer Version Example

Creation Date Begin	01/JAN/1999	Enter begin date for creation date range
Creation Date End	31/DEC/2002	Enter end date for creation date range
Product Number	☐ Exact: ☒ Starts with: ☐ Contains:	
Product Name	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Code	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Description	☐ Exact: ☒ Starts with: ☐ Contains:	
Published Product	All	
Section Assignment	All	Select currently assigned, not currently
Sort By	Creation Date Ascending	
Apply Parameters		

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns :

- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.

- **Section Path** --- Displays the section path of the section where the product is assigned.

The section path is made up of the following: (1) The Relative Path, relative to the store root section; and (2) The Absolute Path, part of the path from the Root section to the parent section of the store root section. The absolute part of the path is enclosed in brackets ([]). When the store points to the Root section, there is no absolute path.

- **Section Name** --- Displays the section name of the section where the product is assigned.
- **Published Section** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Product Start Date** --- Displays the product creation start date.
- **Product End Date** --- Displays the product end date.

The following figure is an example of the data returned screen for this report.

Figure 15–21 Assigned Products Report - Data Returned - Discoverer Version Example

	Creation Date	Category Description	Product Number	Product Name	Published Product	Section Path	Section Name	Published Section	Product Start Date	Product End Date
1	14-FEB-2000	Handheld Computers and PDAs	AS66311	Vision Pad DX - Mobile Computer	Yes	Root> Vision Computers> Home	Hot Deals	Yes	02-APR-2002	
2	14-FEB-2000	Handheld Computers and PDAs	AS66311	Vision Pad DX - Mobile Computer	Yes	Root> Vision Computers Franklin> Home	Hot Deals	Yes	02-APR-2002	
3	14-FEB-2000	Handheld Computers and PDAs	AS66311	Vision Pad DX - Mobile Computer	Yes	Root> UK Vision Computers> Home	Hot Deals	Yes	02-APR-2002	
4	14-FEB-2000	Handheld Computers and PDAs	AS66311	Vision Pad DX - Mobile Computer	Yes	Root> Vision Computers Franklin> Home	Hot Deals 2	Yes	02-APR-2002	
5	13-JUL-2000	Cases	CM51565	Gladiator Leather PC Bag	Yes	Root> Vision Computers	Accessories	Yes	01-SEP-2000	
6	13-JUL-2000	Cases	CM51565	Gladiator Leather PC Bag	Yes	Root> UK Vision Computers	Accessories	Yes	01-SEP-2000	
7	13-JUL-2000	Cases	CM51565	Gladiator Leather PC Bag	Yes	Root> Vision Computers Franklin	Accessories	Yes	01-SEP-2000	
8	13-JUL-2000	Misc. Accessories	CM55437	Vision Slim Docking Station	Yes	Root> UK Vision	Accessories	Yes	05-JUN-2002	

15.7.1.4 Products by Store Report

This Discoverer report displays products assigned to stores (product can be either Published or Unpublished). Users can filter products by different criteria, such as the product number or name, creation date range, and store assignment. In addition, users can filter the report on Category Code, Category Description, Product Published Status, and section assignment as well. This report may be useful to a store manager who wishes to run a report listing which products are included in which store(s). The store manager can verify which section(s) each product has been mapped.

To be included in a store, a product has to be associated with one or more sections. This means that only products already assigned to sections will be displayed in this report. If a product is not included in any store, the product is never displayed in that report.

Note: The report displays --- for each product and by store --- which sections products are assigned to and which products are included in stores. The section publish flag is also displayed. But even if the section flag is Published and the Product publish flag is Published, it doesn't mean the product will show up in the Customer UI. The parent section of the section can have an Unpublished status. The report doesn't take in account this exception case. Also, a product can be assigned to one more many sections, but the product is excluded from all the stores where those sections are included. In that case, the product doesn't appear in the report, since the product is not going to appear under any section in the Store Administration UI.

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Product Exceptions** hyperlink and then the **Products by Store** hyperlink.

Selecting the **Products by Store** hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Store** --- In this mandatory list box (multiple selection allowed) the user selects one or more stores. By default all the stores are selected.
- **Product Creation Date Range** --- Using the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the date range for product creation. All products having a creation date lesser than or equal to the creation date end are selected. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.

- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.
- **Published Product** --- This mandatory LOV filters products by their published/unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Assignment** --- This mandatory field allows the user to show or not section assignments based on the validity of the product start and end date for that section. Values are:
 - **Current** -- This value will retrieve only section assignments for which the system date is within the product start and end date.
 - **Not current** -- This value will retrieve only section assignments for which the system date is not within the product start and end date.
 - **All** --- This value will display section assignments without any criteria on product start and end date for that section.

The default value is All.

- **Secondary Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Product Number Ascending):
 - Creation Date
 - Product Number
 - Product Name

The primary sorting is always on Store Name. For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–22 Products by Stores Report - Input Parameters - Discoverer Version Example

Inventory Organization	Vision Operations	
Store	All Vision Computers US Vision Store UK To select multiple items, hold down the Ctrl key.	
Creation Date Begin	01-JAN-1999	Enter begin date for creation date range
Creation Date End	31-DEC-2002	Enter end date for creation date range
Product Number	☐ Exact: ☒ Starts with: ☐ Contains:	
Product Name	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Code	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Description	☐ Exact: ☒ Starts with: ☐ Contains:	
Published Product	All	
Section Assignment	All	Select currently assigned, not currently assigned or all assigned sections
Secondary Sort By	Product Number Ascending	Select the secondary sort by value. Primary sort is on Store Name

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following sortable columns:

Note: The user is able to roll up this report at the product level (to display products without any section mapping column).

- **Store** --- Displays the store name.
- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.

- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Section Path** --- Displays the section path of the section where the product is assigned.

The section path is made up of the following: (1) The Relative Path, relative to the store root section; and (2) The Absolute Path, part of the path from the Root section to the parent section of the store root section. The absolute part of the path is enclosed in brackets ([]). When the store points to the Root section, there is no absolute path.

- **Section Name** --- Displays the section name of the section where the product is assigned.
- **Published Section** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Product Start Date** --- Displays the product creation start date.
- **Product End Date** --- Displays the product end date.

The following figure is an example of the data returned screen for this report.

Figure 15–23 Products by Stores Report - Data Returned - Discoverer Version Example

	Store	Creation Date	Category Description	Product Number	Product Name	Published Product	Section Path	Section Name	Published Section	Product Start Date	Product End Date
1	Vision Computers US	07-FEB-2002	Uncategorized	75100006	External Speakers	Yes	[Root]> Vision Computers	Accessories	Yes	08-NOV-2002	
2	Vision Computers US	07-FEB-2002	Uncategorized	75100008	Sentinel CD&DVD Burner	Yes	[Root]> Vision Computers	Peripherals	Yes	08-NOV-2002	
3	Vision Computers US	07-FEB-2002	Uncategorized	75100011	Projector Lamp	Yes	[Root]> Vision Computers	Accessories	Yes	08-NOV-2002	
4	Vision Computers US	14-FEB-2000	Handheld Computers and PDAs	AS66311	Vision Pad DX - Mobile Computer	Yes	[Root]> Vision Computers> Home	Hot Deals	Yes	02-APR-2002	
5	Vision Computers US	13-JUL-2000	Cases	CM51565	Gladiator Leather PC Bag	Yes	[Root]> Vision Computers	Accessories	Yes	01-SEP-2000	
6	Vision Computers US	13-JUL-2000	Misc. Accessories	CM55437	Vision Slim Docking Station	Yes	[Root]> Vision Computers	Peripherals	Yes	08-NOV-2002	
7	Vision Computers US	01-SEP-2000	Printers	CM76845	Lightning Laser Printer	Yes	[Root]> Vision Computers	Peripherals	Yes	07-NOV-2002	

15.7.1.5 Products Excluded by Store Report

This Discoverer report displays which products have been explicitly excluded from a specific store. Users can filter products by category, product number, and product name. This report includes only products associated with sections – when a product is not associated to a section, there is no store mapping.

This report may be useful to a store manager who wishes to find out which products of a given category are excluded from a store. This can happen when the same section/product hierarchy is shared across multiple stores.

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Product Exceptions** hyperlink and then the **Products Excluded by Store** hyperlink.

Selecting the **Products Excluded by Store** hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Store** --- In this mandatory list box (multiple selection allowed) the user selects one or more stores. By default all of the stores are selected.
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.
- **Published Product** --- This mandatory LOV filters products by their published/unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Assignment** --- This mandatory field allows the user to show or not section assignments based on the validity of the product start and end date for that section. Values are:
 - **Current** -- This value will retrieve only section assignments for which the system date is within the product start and end date.
 - **Not Current** -- This value will retrieve only section assignments for which the system date is not within the product start and end date.
 - **All** --- This value will display section assignments without any criteria on product start and end date for that section.

The default value is All.

- **Secondary Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Ascending):
 - Creation Date
 - Product Number
 - Product Name

The primary sorting is always on Store Name. For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–24 Products Excluded by Store Report - Input Parameters - Discoverer Version Example

Inventory Organization	Vision Operations	
Store	All Vision Computers US Vision Store UK To select multiple items, hold down the Ctrl key.	
Product Number	☐ Exact: ☒ Starts with: ☐ Contains:	
Product Name	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Code	☐ Exact: ☒ Starts with: ☐ Contains:	
Category Description	☐ Exact: ☒ Starts with: ☐ Contains:	
Published Product	All	
Section Assignment	All	Select currently assigned, not currently assigned or all assigned sections
Secondary Sort By	Creation Date Ascending	Select the secondary sort by value. Primary sort is on Store Name
Apply Parameters		

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Store** --- Displays the store name.
- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.

- **Published Product** --- Displays the product Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Section Path** --- Displays the section path of the section where the product is assigned.

The section path is made up of the following: (1) The Relative Path, relative to the store root section; and (2) The Absolute Path, part of the path from the Root section to the parent section of the store root section. The absolute part of the path is enclosed in brackets ([]). When the store points to the Root section, there is no absolute path.

- **Section Name** --- Displays the section name of the section where the product is assigned.
- **Published Section** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Product Start Date** --- Displays the product creation start date.
- **Product End Date** --- Displays the product end date.

The following figure is an example of the data returned screen for this report.

Figure 15-25 Products Excluded by Store Report - Data Returned - Discoverer Version Example

	Store	Creation Date	Category Description	Product Number	Product Name	Published Product	Section Path	Section Name	Published Section	Product Start Date	Product End Date
1	Vision Computers US	07-FEB-2002	Uncategorized	75100001	PJ1065 XGA Projector	Yes	[Root]> Vision Computers> Home	Hot Deals	Yes	19-JAN-2003	
2	Vision Store UK	07-APR-1997	Notebook Computers	AS92689	Envoy Standard Laptop	Yes	[Root]> UK Vision Computers> Notebooks	Envoy Notebooks - Your Passport to Excellence!	Yes	31-AUG-2000	
3	Vision Store UK	07-FEB-2002	Uncategorized	75100006	External Speakers	Yes	[Root]> UK Vision Computers	Accessories	Yes	08-NOV-2002	

15.7.1.6 Unpublished Products Bin

The Unpublished Products bin on the Reports Dashboard page displays products which have a status of Unpublished, across all stores.

A product’s Published or Unpublished status is equal to the product’s Inventory Web Status flag setting of Yes or No. See [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#), for more information on this flag.

Users can set preferences for the bin display. See [Section 15.4.0.2, "Setting Preferences for Operational Reports"](#), for more information.

By default, this bin displays the following columns:

- **Product Name** -- Displays the name of the product, with drill-down capability to the Update Product: Details page in the Store Administration UI. The name is limited to the first 15 characters; an ellipses (...) displays if this character limit is exceeded.
- **Creation Date** -- Displays the product creation date.
- **Assigned Sections** -- This column displays a number that tells how many sections the product listed is assigned to.

The figure below is an example of this bin.

Figure 15–26 Unpublished Products Bin - Oracle iStore Dashboard Example

Unpublished Products		Edit
Product Name	Creation Date	Assigned Sections
IN1001	06-Aug-2002	0
Test	18-Sep-2002	0

15.7.2 Sections Reports and Bins

This section describes the operational Discoverer reports and Oracle iStore bins that are available for Oracle iStore sections.

The following section reports and bins are available:

- **Sections With Store Assignment** --- This report lists sections assigned to at least one store. See [Section 15.7.2.1, "Sections With Store Assignment Report"](#).
- **Sections Without Store Assignment** --- This report lists sections not assigned to any store. See [Section 15.7.2.2, "Sections Without Store Assignment Report"](#).
- **Sections With Store Exclusion** --- This report lists sections excluded from stores. See [Section 15.7.2.3, "Sections With Store Exclusion Report"](#).

- **Empty Sections** --- This report lists sections with neither products nor sections published under them. See [Section 15.7.2.4, "Empty Sections Report"](#).
- **Unpublished Sections** --- This bin lists sections which have an Unpublished status. See [Section 15.7.2.5, "Unpublished Sections Bin"](#).

15.7.2.1 Sections With Store Assignment Report

This Discoverer report displays all sections mapped to specialty stores. Users can filter sections by various criteria, such as the creation date range, section name, or section code. This report may be useful to a store manager who wishes to find out which newly created sections have not been published.

For more information on the section hierarchy, see [Section 7.1, "Store Sections Overview"](#), and [Section 7.4, "Creating and Maintaining Sections"](#).

Note: Even if the report is run for Published sections, it doesn't mean the selected sections will show up in the Customer UI. The parent section of the selected sections can be Unpublished, while the section is Published. This exception case is not taken in account in this report.

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Section Exceptions** hyperlink and then the **Sections With Store Assignment Report** hyperlink.

Selecting the **Sections With Store Assignment Report** hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the begin and end date section create date criteria.
- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.

- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
 - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
 - **Not Current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
 - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Descending):
 - Creation Date
 - Section Code
 - Section Name
 - Section Path

For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–27 Sections With Store Assignment Report - Input Parameters - Discoverer Version Example

Creation Date Begin	01-JAN-2000
Creation Date End	01-JAN-2002
Section Code	☐ Exact: ☒ Starts with: ☐ Contains:
Section Name	☐ Exact: ☒ Starts with: ☐ Contains:
Published	All ▾
Section start and end date	All ▾
Sort By	Creation Date Descending ▾
Apply Parameters	

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.
- **Published** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date Active** --- Displays the section start date.
- **End Date Active** --- Displays the section end date, if any.
- **Stores** -- Displays the store names where the section is assigned.

The following figure is an example of the data returned screen for this report.

Figure 15–28 Sections With Store Assignment Report - Data Returned - Discoverer Version Example

	Creation Date	Section Name	Section Code	Published	Section Path	Start Date Active	End Date Active	Stores
1	06-AUG-2001	services	.	Yes	[Root]> Comms B2B iStore> wireless	24-JUL-2001		Communications eStore
2	06-AUG-2001	services	.	Yes	[Root]> Comms B2B iStore> wireless	24-JUL-2001		IBE EOS Preview Minisite
3	06-AUG-2001	services	.	Yes	[Root]> Comms B2B iStore> wireless	24-JUL-2001		Store - Self Service Admin
4	30-JUL-2001	adsl modems	.	Yes	[Root]> Comms B2B iStore> high speed access	30-JUL-2001		Communications eStore
5	30-JUL-2001	adsl modems	.	Yes	[Root]> Comms B2B iStore> high speed access	30-JUL-2001		IBE EOS Preview Minisite
6	30-JUL-2001	adsl modems	.	Yes	[Root]> Comms B2B iStore> high speed access	30-JUL-2001		Store - Self Service Admin
7	23-JUL-2001	plans	.	Yes	[Root]> Comms B2B iStore> wireless	23-JUL-2001		Communications eStore

15.7.2.2 Sections Without Store Assignment Report

This Discoverer report displays sections which have no mapped stores. Users can filter sections by creation date range, section name, or section code. This report may be useful to a store manager who wishes to find out which sections are not mapped to any stores.

For more information on the section hierarchy, see [Section 7.1, "Store Sections Overview"](#), and [Section 7.4, "Creating and Maintaining Sections"](#).

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Section Exceptions** hyperlink and then the **Sections Without Store Assignment Report** hyperlink.

Selecting the **Sections Without Store Assignment Report** hyperlink will bring up the input parameters screen with the following options:

- **Date Range ---** In the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the begin and end date section create date criteria.

- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
 - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
 - **Not Current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
 - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Descending):
 - Creation Date
 - Section Code
 - Section Name
 - Section Path

For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–29 Sections Without Store Assignment Report - Input Parameters - Discoverer Version Example

Creation Date Begin	01-JAN-2000
Creation Date End	01-JAN-2003
Section Code	☐ Exact: ☒ Starts with: ☐ Contains:
Section Name	☐ Exact: ☒ Starts with: ☐ Contains:
Published	All
Section start and end date	All
Sort By	Creation Date Descending
Apply Parameters	

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.
- **Published** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date** --- Displays the section start date.
- **End Date** --- Displays the section end date, if any.

The following figure is an example of the data returned screen for this report.

Figure 15–30 Sections Without Store Assignment Report - Data Returned - Discoverer Version Example

	Creation Date	Section Name	Section Code	Published	Section Path	Start Date	End Date
1	14-DEC-2001	Root	.	Yes		02-MAY-2000	
2	06-AUG-2001	accessories	.	Yes	Root> Comms B2C iStore> wireless	23-JUL-2001	
3	06-AUG-2001	phones	.	Yes	Root> Comms B2C iStore> wireless	23-JUL-2001	
4	06-AUG-2001	plans	.	Yes	Root> Comms B2C iStore> wireless	23-JUL-2001	
5	06-AUG-2001	wireless	.	Yes	Root> Comms B2C iStore	23-JUL-2001	
6	06-AUG-2001	services	.	Yes	Root> Comms B2C iStore> wireless	24-JUL-2001	
7	30-JUL-2001	speed connect	.	Yes	Root> Comms B2C iStore> dsl	30-JUL-2001	
8	30-JUL-2001	dsl modems	.	Yes	Root> Comms B2C iStore> dsl	30-JUL-2001	
9	30-JUL-2001	internet	.	Yes	Root> Comms B2C iStore> cable	30-JUL-2001	
10	30-JUL-2001	pay-per-view	.	Yes	Root> Comms B2C iStore> cable	30-JUL-2001	
11	30-JUL-2001	basic service	.	Yes	Root> Comms B2C iStore> telephone	30-JUL-2001	
12	30-JUL-2001	long distance	.	Yes	Root> Comms B2C iStore> telephone	30-JUL-2001	
13	30-JUL-2001	dsl	.	Yes	Root> Comms B2C iStore	30-JUL-2001	

15.7.2.3 Sections With Store Exclusion Report

This Discoverer report displays sections which have been explicitly excluded from stores. Each store is mapped to a parent section in the store hierarchy. In this report, only sections within the parent section of the selected store(s) are considered. Users can filter sections by creation date range, section name, or section code.

This report may be useful to a store manager who wishes to find out which sections have been excluded from a specific store. This scenario would occur typically when the same section hierarchy is shared across multiple stores. In this case, some sections may be excluded from a store.

For more information on the section hierarchy, see [Section 7.1, "Store Sections Overview"](#), and [Section 7.4, "Creating and Maintaining Sections"](#).

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Section Exceptions** hyperlink and then the **Sections With Store Exclusion Report** hyperlink.

Selecting the **Sections With Store Exclusion Report** hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the begin and end date store create date criteria.
- **Stores** --- The user can use this field to select one or more stores.
- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
 - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
 - **Not current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
 - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following secondary sort criteria (default selection: Creation Date Descending):
 - Creation Date
 - Section Code
 - Section Name
 - Section Path

The primary sorting is always by store. For each sort criterion, you can specify if the sort is ascending or descending.

The following figure is an example of the input parameters screen for this report.

Figure 15–31 Sections With Store Exclusion Report - Input Parameters - Discoverer Version Example

Creation Date Begin	01-JAN-1998	Enter begin date for creation date range
Creation Date End	01-JAN-2003	Enter end date for creation date range
Stores	All Vision Computers US Vision Store UK To select multiple items, hold down the Ctrl key.	
Section Code	☐ Exact: ☒ Starts with: ☐ Contains:	
Section Name	☐ Exact: ☒ Starts with: ☐ Contains:	
Published	All	
Section start and end date	All	Select current, not current or all
Sort By	Creation Date Descending	
Apply Parameters		

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Store** --- Displays the store name where the section is excluded.
- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.

- **Published** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date Active** --- Displays the section start date.
- **End Date Active** --- Displays the section end date, if any.

The following figure is an example of the data returned screen for this report.

Figure 15–32 Sections With Store Exclusion Report - Data Returned - Discoverer Version Example

	Store	Creation Date	Section Name	Section Code	Published	Section Path	Start Date Active	End Date Active
1	Vision Computers US	22-MAR-2002	Envoy Notebooks - Your Passport to excellence!	ENUS	Yes	[Root]> Vision Computers> Notebooks	31-AUG-2000	
2	Vision Store UK	14-JUN-2002	Accessories	.	Yes	[Root]> UK Vision Computers	31-AUG-2000	
3	Vision Store UK	14-JUN-2002	Desktops	.	Yes	[Root]> UK Vision Computers	31-AUG-2000	

15.7.2.4 Empty Sections Report

This Discoverer report displays all the sections that have no products or sections published under them, across all stores. Users can filter sections by creation date range, section name, or section code.

A section qualifies as *empty* if it meets **at least one** of the following criteria:

1. The section has no children (sections or products); OR
2. All the children of the section are unpublished; OR
3. All the children have a start and end date which are not current; OR
4. All the children of the section are excluded from all the stores in which the section is included.

Example: Section 1 has one child, Product 1. Product 1 is excluded from Store 1, and Section 1 is included only in Store 1. In this example, Section 1 is considered empty.

This report may be useful to a store manager who wants to know if there are any empty sections in any stores. This situation usually happens when an automated script modifies the product flag to Unpublish. In this case, sections may end up empty.

Note: Even if the report is run for Published sections, it doesn't mean the selected sections will show up in the Customer UI. The parent section of the selected sections can be Unpublished, while the section is Published. This exception case is not taken in account in this report.

Steps to Retrieve this Report:

1. Select **Reports > Discoverer Reports > Operational Reports** in the Store Administration UI.
2. In the Operational Reports table, select the **Catalog Section Exceptions** hyperlink and then the **Empty Sections Report** hyperlink.

Selecting the **Empty Sections Report** hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional **Creation Date Begin** and **Creation Date End** fields, the user can set the begin and end date store create date criteria.
- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
 - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
 - **Not Current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
 - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following secondary sort criteria (default selection: Creation Date Descending):

- Creation Date
- Section Code
- Section Name
- Section Path

For each sort criterion, you can specify if the sort is ascending or descending. The following figure is an example of the input parameters screen for this report.

Figure 15–33 Empty Sections Report - Input Parameters - Discoverer Version Example

Creation Date Begin	01-JAN-2000
Creation Date End	01-JAN-2003
Section Code	☐ Exact: ☒ Starts with: ☐ Contains:
Section Name	☐ Exact: ☒ Starts with: ☐ Contains:
Published	All
Section start and end date	All
Sort By	Creation Date Descending
Apply Parameters	

After making his selections, the user then clicks the **Apply Parameters** button and brings up the report data with the following columns:

- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.
- **Published** --- Displays the section Published/Unpublished status: **Yes** means the product is Published. **No** means product is Unpublished.

- **Section Path** --- Displays the section path.
- **Start Date** --- Displays the section start date.
- **End Date** --- Displays the section end date, if any.
- **Stores** --- Displays the stores that the section is mapped to. If the section has no store mapping, the value displays as Unassigned.

The following figure is an example of the data returned screen for this report.

Figure 15–34 Empty Sections Report - Data Returned - Discoverer Version Example

	Creation Date	Section Name	Section Code	Published	Section Path	Start Date	End Date	Stores
1	14-JUN-2002	Mobile	.	Yes	[Root]> UK Vision Computers	08-FEB-2001		UK Vision Store
2	23-JUL-2001	welcome	.	Yes	[Root]> Comms B2B iStore	23-JUL-2001		Communications eStore
3	23-JUL-2001	welcome	.	Yes	[Root]> Comms B2B iStore	23-JUL-2001		IBE EOS Preview Minisite
4	23-JUL-2001	welcome	.	Yes	[Root]> Comms B2B iStore	23-JUL-2001		Store - Self Service Admin

15.7.2.5 Unpublished Sections Bin

The Unpublished Sections bin on the Reports Dashboard page displays sections which have a status of Unpublished, across all stores.

Users can set preferences for the bin display. See [Section 15.4.0.2, "Setting Preferences for Operational Reports"](#), for details.

By default, this bin displays the following columns:

- **Section Name** -- Displays the name of section. The section name is limited to the first 15 characters; an ellipses (...) displays if this character limit is exceeded. The section name field is a hyperlink to the Update Section: Details page in the Store Administration UI.
- **Creation Date** -- Displays the section creation date.
- **Featured** -- This column displays **Yes** or **No**, depending upon whether the section is a Featured section. See [Section 7.1.3, "Section Types: Featured, Navigational, and Leaf"](#), for more information.

The figure below is an example of this bin.

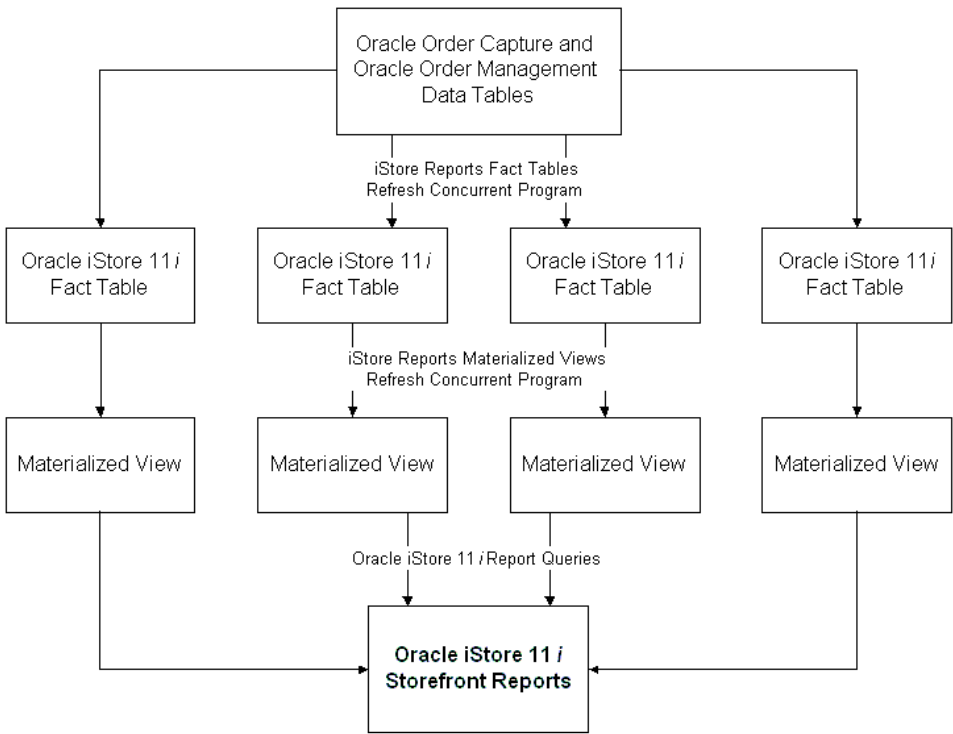
Figure 15–35 Unpublished Sections Bin - Oracle iStore Dashboard Example

Unpublished Sections Edit		
Section Name	Creation Date	Featured
Sale	15-JAN-2003	No

15.8 Understanding Oracle iStore Reports Architecture

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

Figure 15–36 Oracle iStore 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 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 Oracle iStore reports are run against these fact tables.

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 Oracle iStore 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 current, accurate data is always available for the Oracle iStore reports.

The **iStore Alert Reports** concurrent program triggers delivery of the updated **Top 10 Orders Report** and **Historical Summary Report** as e-mail notifications.

The reports and queries that comprise Oracle iStore reports are run against these fact tables. The following table, Fact Tables for Oracle iStore Reports, describes the fact tables for Oracle iStore Reports.

Table 15–5 Fact Tables for Oracle iStore 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.
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.

15.9 Oracle iStore Reports Lookup Types

The Oracle iStore 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 Oracle iStore Reports use information for the orders that are placed for these 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.

Prerequisites

None

Responsibility

Application Developer

Navigation

Log in to Oracle Forms.

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.

Implementing Globalization and Multiple Organization Architecture

This chapter describes how to implement Oracle iStore 11i[®] in a global instance.

Topics include:

- [Overview of Globalization and Multiple Organization Architecture](#)
- [Oracle iStore Key Global Features and Benefits](#)
- [Implementing Globalization with Oracle iStore](#)

16.1 Overview of Globalization and Multiple Organization Architecture

A global implementation of your Oracle Applications enables you to do business in multiple countries, languages, and currencies. Leveraging Oracle Multiple Organization Architecture ("multi-org"), a global implementation allows you to:

- Create multiple sets of books, each with its own unique calendar, chart of accounts, and functional currency. Each set of books then can be tied to a sub-organization of your master organization, and to separate legal entities.
- Sell Inventory from one legal entity (which uses one set of books) and ship them from another legal entity (using a different set of books). Oracle Receivables can automatically record the appropriate intercompany sales by posting intercompany accounts payable and accounts receivable invoices.
- Reuse database tables, meaning one-time data entry.
- Ability to segregate transactions by operating unit -- since each organization is uniquely linked to an operating unit -- yet still share certain information (such as customers) between organizations.

- Support multiple currencies (including the Euro) and several languages.

Note: All customers who are using currently supported versions of the E-Business Suite Release 11i products that are Multi-Org enabled (this includes Oracle iStore), will need to complete the prerequisite step of running the Convert to Multi-Org process before applying patches released after September 30, 2002. This is a one-time step.

For Oracle Applications Multi-Org information, see:

- *Multiple Organizations in Oracle Applications*, Part No. A81174-02.

To find this manual, visit [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and search for the part number listed above. Or, navigate to Top Tech Docs > E-Business Suite: ERP > Applications Core Technology > Multiple Organizations Architecture > Manuals and eTRMs > Architecture section.

16.2 Oracle iStore Key Global Features and Benefits

Oracle iStore is fully equipped to support a global deployment by offering --- in addition to the multi-org architecture benefits discussed above --- several features and benefits that can enable you to present a world-wide web presence. Some of these features and benefits include:

- After assigning responsibilities to an operating unit, the ability to limit user purchases to one operating unit's set of books.
- Internet stores in multiple languages and currencies.
- Ability to translated product data and store prompts.
- Support for regional payment type availability.
- Restriction of bill-to and ship-to countries for each operating unit.
- Localization of product catalogs and inventory.
- Support for regional tax requirements, payment types, and shipping methods.

16.3 Implementing Globalization with Oracle iStore

The following are the steps to successfully implement globalized web specialty stores using Oracle iStore:

- [Section 16.3.1, "Implement Oracle Multiple Organization Architecture"](#)
- [Section 16.3.2, "Install Languages and Currencies"](#)

- [Section 16.3.3, "Set up Responsibilities"](#)
- [Section 16.3.4, "Create Global Store"](#)
- [Section 16.3.5, "Translate Product Descriptions"](#)
- [Section 16.3.6, "Enable Global Currencies and Price Lists"](#)
- [Section 16.3.7, "Set up Globalized Templates and Multimedia"](#)
- [Section 16.3.8, "Implement Global Messages and Prompts"](#)
- [Section 16.3.9, "Use Global Address Formats"](#)

16.3.1 Implement Oracle Multiple Organization Architecture

A global implementation of Oracle iStore requires that iStore's mandatory dependencies (see [Section 2.2.2, "Mandatory Dependency Implementation Steps"](#) for dependencies) be implemented using the Oracle Multiple Organization Architecture. Oracle iStore relies on the schema supplied by these applications for much of its back-office global functionality.

For Oracle Applications Multi-Org information, see:

- *Multiple Organizations in Oracle Applications*, Part No. A81174-02.

To find this manual, visit [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and search for the part number listed above. Or, navigate to Top Tech Docs > E-Business Suite: ERP > Applications Core Technology > Multiple Organizations Architecture > Manuals and eTRMs > Architecture section.

16.3.2 Install Languages and Currencies

You can set up multiple stores (all within a single instance), each deploying a different currency and language. Oracle iStore supports all of the currencies that the Oracle E-Business Suite supports, including the Euro. Through its integration with Oracle Applications Release 11i, each specialty store also can display appropriate currency symbols.

Languages and currencies are enabled in the Oracle Application Object Library (AOL) module during setup. After initially enabling languages in AOL, you set them up in General Ledger.

A web customer's preference, as defined in his Oracle iStore user profile, determines which currency and language is used for a specialty store.

To install multiple languages and currencies see below.

- *Installing Oracle Applications, Release 11i (Chapter 5 - Finishing your Installation - Setup National Language Support (NLS)).Note 177183.1,*
- *Installing NLS/MLS in 11.5.x - The Definitive Guide*
- *Note 177837.1, NLS/MLS - Setup and Usage*
- *Doc. 73352.1, NLS/MLS Frequently Asked Questions*

To enable the currencies that your stores will support, see the following:

- *Oracle General Ledger User Guide*

These documents can be found on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

16.3.3 Set up Responsibilities

Each store supports multiple responsibilities, and each iteration of a store and a responsibility make a specialty store accessible in the Customer UI. It is recommended, however, that you set up your stores to each support a single responsibility (and thus a single specialty store). This single specialty store then can be rendered in different languages and currencies.

When a user's registration is approved, he is granted at least one responsibility. A customer's responsibility determines the specialty stores that he can access. Out-of-the-box, Oracle iStore supplies the responsibility, IBE_CUSTOMER, for use with your customers.

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.

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 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 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.

For a multi-org implementation, you must:

1. Create a separate responsibility for each operating unit. You can use the seeded responsibility IBE_CUSTOMER as one of these responsibilities. Each operating unit must be tied uniquely to a single responsibility.

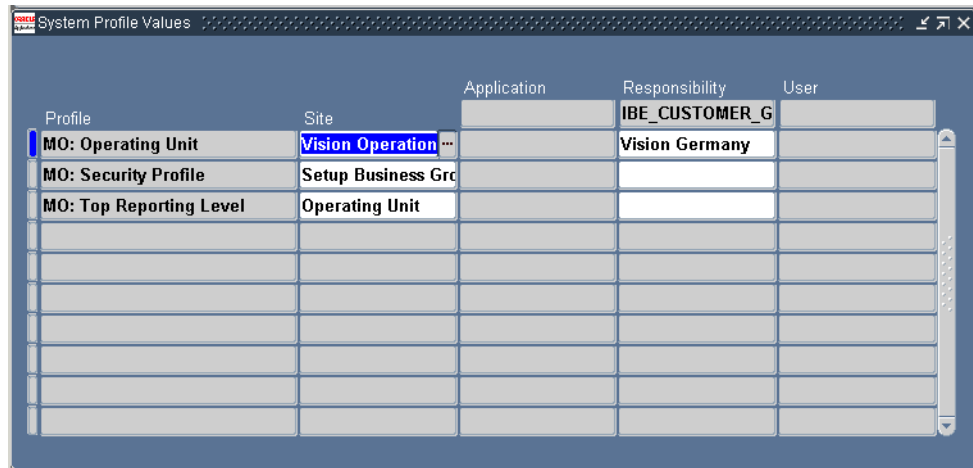
Example: Create IBE_CUSTOMER_G for your German operating unit, and use IBE_CUSTOMER for your U.S. operating unit.

2. Link each responsibility to an operating unit by setting the **MO: Operating Unit** profile option at the responsibility level to the operating unit.

Example: At the responsibility level IBE_CUSTOMER_G, set MO: Operating Unit to Vision Germany.

The figure below shows how you can link an operating unit (Vision Germany) to its responsibility (IBE_CUSTOMER_G) by setting the profile option, MO: Operating Unit at responsibility level.

Figure 16–1 Setting the MO:Operating Unit Profile at Responsibility Level for Multiple Organization Implementation



Profile	Site	Application	Responsibility	User
MO: Operating Unit	Vision Operation		Vision Germany	
MO: Security Profile	Setup Business Grc			
MO: Top Reporting Level	Operating Unit			

To set the profile option **MO: Operating unit**, follow this procedure:

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. In the **Application** LOV, type iStore.

4. In the **Responsibility** LOV, search for the responsibility that you want to set the profile option at. For example, IBE_GERMANY.
5. In the Profile field, enter the profile name, **MO: Operating Unit**
6. Select **Find**.
7. Set the profile value for MO: Operating Unit at the responsibility level.
8. Save your changes.

16.3.4 Create Global Store

Using the Oracle iStore Store Administration UI, create a new store for each responsibility, and link each store with its responsibility.

Prerequisites

- Your implementation is set up using Multiple Organization Architecture. See *Multiple Organizations in Oracle Applications*, for details.
- You have implemented additional languages and currencies. See [Section 16.3.2, "Install Languages and Currencies"](#).
- You have created separate responsibilities for each operating unit your customers will access through the Customer UI. See [Section 16.3.3, "Set up Responsibilities"](#), for details.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI by logging in as a user with a valid Oracle iStore administrator (manager) responsibility.
2. In the default landing page, **Stores**, select **Create**. The Create Store page opens.
3. Create your store utilizing the steps in Chapter 4, [Section 4.2.2, "Creating a Store"](#).

During this process, you can search and select for the global responsibility created in [Section 16.3.3, "Set up Responsibilities"](#).

Example: For the store to be used with the German operating unit, you would search for and select the IBE_CUSTOMER_G responsibility.

16.3.5 Translate Product Descriptions

See [Section 6.5, "Translating Product Descriptions"](#), for details.

16.3.6 Enable Global Currencies and Price Lists

Oracle iStore supports all of the currencies supported across the Oracle E-Business Suite, including the Euro. In Oracle Order Management's Basic Pricing module, you can create price lists for all currencies in which you perform transactions. Oracle iStore selects price lists linked to the customer's currency when displaying catalog prices and performing transactions.

To create a global price list, follow these steps:

- [Set up Global Price List](#)
- [Add Products to Global Price List](#)
- [Associate Global Price List to Store](#)

16.3.6.1 Set up Global Price List

Prior to creating a global price list, the implementation must include a multiple organization architecture.

Prerequisites

- Additional currencies are enabled.
- Appropriate currency symbols are set up.
- Pricing profile option values are determined.

Responsibility

Order Management Super User or Oracle Pricing Manager

Login

Oracle Forms

Steps

1. Log in to Oracle Forms as Order Management Super User or Oracle Pricing Manager.
2. Navigate to **Price Lists > Price List Setup**.
3. In the **Price List** form, enter the following:
 - **Price List Name:** Use a name that reflects the global implementation. For example, VISION_EURO_PL.
 - **Description:** Include a short description of the global price list. For example, Euro price list for VISION_EURO global implementation.
 - **Currency:** Choose the default currency. For example, choose EUR for the VISION_EURO_PL.
4. Navigate to the **List Lines** tab.
 - Add products to the price list. For specific steps, see the Add Products to a Price List section, in the following section.
5. Save your work.

16.3.6.2 Add Products to Global Price List

Adding products to a global price list is the same as adding products to a basic price list. However, when implementing a global price list, the following prerequisites should be verified:

- Operating units support the global implementation.
- Products are assigned to the appropriate Inventory Organization.
- Price list global currency matches store supported currency.

16.3.6.3 Associate Global Price List to Store

To associate a global price list to a global store, first verify the following:

- Global store is implemented.
- Global currency is enabled.
- Global price list is created.
- Default currency is assigned.
- Organizational assignment and operating units are verified.

For more information see *Oracle General Ledger User Guide* and *Oracle Inventory User's Guide*.

See [Section 4.2.2, "Creating a Store"](#), for steps to assign price lists to a store.

16.3.7 Set up Globalized Templates and Multimedia

You can create a unique look and feel for each specialty store based on the requirements of that specialty store. To accomplish this, use the multimedia feature in iStore and set up specific multimedia and templates for each supported language.

- See [Section 8.5, "Understanding Media Objects"](#), for details.

16.3.8 Implement Global Messages and Prompts

All seeded specialty store text messages, such as prompts and labels, are stored in Oracle Applications Message Dictionary. If a global store continues to use the seeded text for messages and prompts, these the seeded text will automatically be translated when the additional languages are installed. However, if alternate messages text is created, then the merchant will need to manually translate the content.

- See [Section 14.2.2, "Translating Message Text"](#), for details.

16.3.9 Use Global Address Formats

Through its integration with Oracle Receivables, Oracle iStore can provide address entry formats specific to particular countries. This allows the application to dynamically provide Address Book data entry formats based on the country selected by the user.

- See [Section 2.7.1, "Setting up Country Address Formats"](#), for instructions.

Implementing Performance and SSL

This chapter describes the implementation of performance improvements and SSL connections in Oracle iStore 11*i*.

Topics include:

- [Overview of Caching](#)
- [Overview of Cached Data in Oracle iStore](#)
- [Setting up JTT Cache](#)
- [Setting Up Secure Socket Layer Connections](#)

17.1 Overview of Caching

Caching technology allows the storage and monitoring of web object (Java object) requests from a server. On subsequent requests for the same object, the cache delivers the object from its storage rather than passing the request on to the origin server. This increases the speed with which objects are retrieved, and thus speeds performance of your web site.

Web objects change over time, so each web object has a useful life, or "freshness." Caches determine whether or not their copy of an object is still "fresh," or whether they need to retrieve a new copy from the origin server. The higher the number of people requesting the same object during its useful life, the more upstream traffic the cache eliminates. By handling object requests rather than passing them upstream to the origin server, caches reduce network traffic and improve the browsing experience for users.

17.2 Overview of Cached Data in Oracle iStore

You can set up Oracle iStore to rely on Oracle CRM Technology Foundation (JTT) Cache to cache your web store page objects.

Note: Beginning with this release, JTT Cache replaces the use of IBE Cache. If you are currently using IBE Cache, then you must migrate to the use of JTT Cache.

Important: Ensure that the profile option, **IBE: Cache On**, is set to **No** at the iStore application level. This enables JTT Cache. Remember to bounce the Apache server after making this profile setting.

For details on how to set up JTT Cache, see:

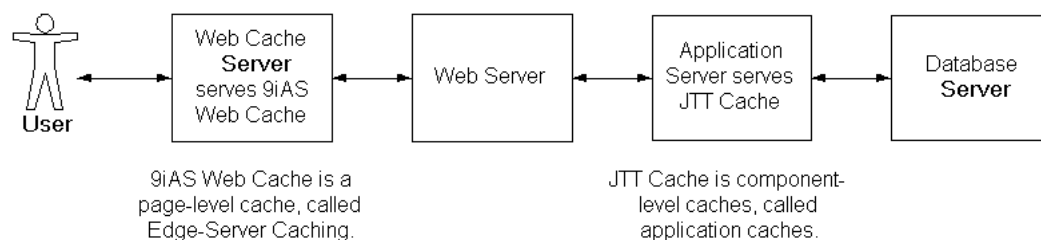
- *Oracle CRM System Administrator Console Concepts and Procedures*, Release 11.5.8, "Using the Cache Subtab" chapter
- *Oracle CRM Technology Foundation Implementation Guide*, Release 11.5.6, "Performance Framework" section

You also can integrate Oracle iStore with Oracle9iAS Web Cache to serve cached data. See [Chapter 30, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), for more information.

JTT Cache is a component-level cache known as an application cache. Oracle9iAS Web Cache is a page-level cache known as Edge-Server caching. These two types of caches do not interconnect in any way.

The following diagram explains the relationship between JTT Cache and Oracle9iAS Web Cache.

Figure 17–1 Web Caching in Oracle iStore, using Oracle9iAS Web Cache and JTT Cache



17.3 Setting up JTT Cache

Oracle iStore can use the Oracle CRM Technology Foundation (JTT) Cache to improve store performance.

For details on how to set up JTT Cache, see:

- *Oracle CRM System Administrator Console Concepts and Procedures*, Release 11.5.8, "Using the Cache Subtab" chapter
- *Oracle CRM Technology Foundation Implementation Guide*, Release 11.5.6, "Performance Framework" section

Note: If you are using JTT Cache, then disable the Oracle iStore cache, by setting the profile option, **IBE: Cache On** to **No** at the application level to iStore.

17.3.1 Component Caches for iStore in JTT

JTT Cache framework manages caches in two levels: component level and object level. A cache component is a collection of cached objects of the same type. Each cache component holds all the Java objects associated to an application. For example, IBE_SECTION_CACHE component contains all cached section objects, while IBE_ITEM_CACHE contains all item (product) objects.

Each application uses one or more component caches. Within each component cache, are component identifiers. Cached objects, which are striped by unique keys, are used almost everywhere in JSPs and Java classes. Where these objects are used is fully determined by business logic and the underlying implementation.

The following table, Oracle iStore Component Caches, shows the JTT component cache identifiers that are seeded in Oracle iStore. The table lists the Component Identifier (component cache) and the Description of each identifier.

Table 17–1 Oracle iStore Component Caches

iStore Component Identifier	What it Caches
IBE_ACCESSNAMEID_CTX_CACHE	Programmatic access names of the display styles' logical IDs
IBE_ADDRESS_VALIDATION_CACHE	Address validation status for each operating unit
IBE_CURRENCY_CACHE	Currency information, including currency symbol and translated currency names
IBE_INVORG_SHPMTHD_CACHE	Shipping methods based on inventory organization ID
IBE_ITEM_CACHE	Item objects
IBE_MEDIA_CACHE	Logical name to physical file mapping for multimedia components

Table 17–1 Oracle iStore Component Caches (Cont.)

iStore Component Identifier	What it Caches
IBE_MEDIA_CTGCTX_CACHE	Context of multimedia components for product categories
IBE_MEDIA_DEFAULT_CACHE	Context of default multimedia components
IBE_MEDIA_PRDCTX_CACHE	Context of multimedia components for products and sections
IBE_MEDIA_TEXT_CACHE	Text media, i.e., Oracle Application Object Library messages
IBE_MSITE_AN_CACHE	Specialty store object by access name
IBE_MSITE_ID_CACHE	Specialty store object by store ID
IBE_OU_CACHE	Operating unit object, which stores information such as ship-to and bill-to countries
IBE_SEARCH_CATEG_CACHE	Category-level product search LOV in stores' menu bars
IBE_SECTION_CACHE	Section objects and navigational hierarchy
IBE_STORE_LANGUAGE	Stores the StoreLanguage object where the key is the language code
IBE_STORE_PROFILE_CACHE	Application-level profile option settings
IBE_STYLE_CACHE	Address style for each country
IBE_TEMPLATE_CACHE	Logical name to physical file mapping for templates
IBE_TEMPLATE_DEFAULT_CACHE	Default context of templates
IBE_TEMPLATE_PRDCTX_CACHE	Context of templates for products and categories
IBE_UOM_CACHE	Units of measure and their translations

For information on how to set up and use JTT Cache, see:

- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle CRM Technology Foundation Concepts and Procedures*

17.4 Setting Up Secure Socket Layer Connections

Short for Secure Sockets Layer, SSL is a protocol that allows the transmitting of private documents via the Internet. SSL works by using a public key to encrypt data that's transferred over the SSL connection.

Both Netscape Navigator and Internet Explorer support SSL, and many web sites use the protocol to obtain confidential user information, such as credit card numbers. By convention, URLs that require an SSL connection start with https: instead of http:.

Oracle iStore provides support for serving pages through SSL network connections, and can switch seamlessly between HTTP and HTTPS protocol. This reduces costs for the hardware required to serve Oracle iStore pages through SSL. It also provides improved performance with HTTP for non-secure Oracle iStore pages, such as the catalog pages.

Pages that are SSL-enabled are considered secure, while pages that are not served through SSL are considered non-secure.

This section contains:

- [Section 17.4.1, "Enabling SSL Switching"](#)
- [Section 17.4.2, "SSL and Non-SSL Enabled Pages in Oracle iStore"](#)
- [Section 17.4.3, "Setting JTT JVM Cookie Parameters"](#)

17.4.1 Enabling SSL Switching

To enable protocol switching between secure and non-secure URLs, set the following profile options:

- **IBE: iStore Secure URL** --- Set to the base URL where HTTPS is installed.
- **IBE: iStore Non Secure URL** --- Set to the base URL where HTTP is installed.

This enables the application to recognize the hostnames and ports. If you do not want to support protocol switching, leave the profiles blank.

When you set these profile options, hyperlinks that cause a transition from SSL to non-SSL and vice versa become absolute. Also, hyperlinks that are shared by both SSL and non-SSL pages become absolute. Absolute hyperlinks have the following HTML syntax:

```
<a href="https://<host>:<port>/OA_HTML/ ibeCAcdLogin.jsp?a=b"></a>
```

In contrast, relative hyperlinks have the following syntax:

```
<a href="ibeCAcdLogin.jsp?a=b"></a>
```

17.4.1.1 Accessing the Database with a Private Middle Tier

Your support team may need to access the database using its own private middle tier. For example, if your HTTPS server is down for maintenance, the team may need this access to test other functionality. To allow access to the database with a private middle tier, you will need to make all hyperlinks relative.

You can make the hyperlinks relative by appending "?intra=t" to your Oracle iStore home page URL.

Use the following procedure to make the hyperlinks relative.

Prerequisites

None

Responsibility

None

Navigation

None

Steps

1. Navigate to the following URL:

```
http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?intra=t
```

2. The page opens. All hyperlinks are now relative to the following URL:

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

17.4.2 SSL and Non-SSL Enabled Pages in Oracle iStore

The following table summarizes which Oracle iStore components have SSL-enabled pages and which do not.

Table 17-2 Oracle iStore Secure and Non-Secure Pages

SSL-Enabled Pages	Non-SSL-Enabled Pages
■ Sign In ■ Cart Saving and Sharing ■ Checkout Flow ■ Express Checkout ■ Customer Profile ■ Order History	■ Catalog ■ Shopping Cart

17.4.3 Setting JTT JVM Cookie Parameters

If your HTTP and HTTPS servers are set up in different sub-domains and paths, two JVM parameters must be set in Oracle CRM Technology Foundation so that the session cookies are sent to both servers. The following are the parameters:

- `jtt_cookie_domain`
- `jtt_cookie_path`

Example:

If the HTTP server is `http://www.xyz.com/path1` and the HTTPS server is `https://secure.xyz.com/path2`, the JVM parameters should be set as follows:

- `jtt_cookie_domain=xyz.com`
- `jtt_cookie_path=/`

For information on how to set these parameters in CRM Technology Foundation, please refer to the *CRM Technology Foundation Implementation Guide*.

Part IV

Post Implementation Tasks

Part IV, "Post Implementation Tasks" includes procedures for verifying and troubleshooting your Oracle iStore 11*i* implementation.

This part contains the following chapters:

- [Chapter 18, "Verifying the Implementation"](#)
- [Chapter 19, "Diagnostics and Troubleshooting"](#)

Verifying the Implementation

This chapter describes the tasks required to verify your implementation of Oracle iStore 11*i*.

Topics include:

- [Oracle iStore Implementation Verification Tasks](#)
 - [Testing the Stores](#)
 - [Using Preview Mode](#)

18.1 Oracle iStore Implementation Verification Tasks

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 18.1.2, "Using Preview Mode"](#) for more information on testing the appearance of products and sections in your web stores.

18.1.1 Testing the Stores

Use the following procedure to test your specialty stores before launching them.

Prerequisites

A store has been created, and a supported iStore responsibility has been assigned to it.

Responsibility

The responsibility varies.

Navigation

See below.

Steps

1. Navigate to the **Specialty Stores Page** at the following URL:

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

If you are using the Specialty Store Page, this page allows you to navigate to any of your specialty stores, and to sign in if necessary. If you are not using the Specialty Store Page, you are automatically rerouted to the default specialty store or, if the default specialty store is not available to you, to the first specialty store you can access with your user responsibility.

2. Optional: You can also access a store's specialty stores directly at the following URL:

```
http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?site=<Store ID>
```

Note: Store ID (also called Minisite ID) is viewable in the **Update Store: Details** page. This is a unique identifier given to the store upon creation.

18.1.2 Using Preview Mode

Oracle iStore's Preview mode allows merchants to preview Customer UI specialty stores while working on them in the Store Administration UI.

Use the **Preview** feature of Oracle iStore to preview the appearance of your specialty stores, sections, and products before making them available to customers. Preview mode is available in the **Stores**, **Sections**, and **Products** pages.

This section discusses the following:

- [Section 18.1.2.1, "Preview and Transactions"](#)
- [Section 18.1.2.2, "Preview and Web Cache"](#)
- [Section 18.1.2.3, "Preview and Languages"](#)
- [Section 18.1.2.4, "Accessing Preview Mode"](#)

18.1.2.1 Preview and Transactions

You cannot perform any transactional processes in Preview mode, such as place orders, check out, log out, etc. The only purpose of Preview mode is to browse the

catalog. Icons at the top of the page and links in the Browse Bin are not selectable. If you select the **Add to Cart** button, an error message, *Transaction is disabled in Preview mode* will be shown.

18.1.2.2 Preview and Web Cache

In a typical scenario, when the merchant selects the **Preview** button in Store Administration UI, the Customer UI is retrieved through the application server and uses data cached through JTT Cache. This ensures freshly cached data. Changes made by the store manager in the Store Administration UI are immediately viewable in the Customer UI.

There may be cases however, when the merchant enters Preview mode through the Oracle 9iAS Web Cache. This type of preview, however, is not supported due to likelihood of seeing stale cached data. See [Chapter 30, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), for more information.

18.1.2.3 Preview and Languages

When previewing a specialty store, a section, or a product, in the preview store window, specialty stores which do not support the iStore administrator's current session language **will not be listed**. For example, if the iStore administrator's current session language is German, specialty stores which do not support the German language will not appear in the store list.

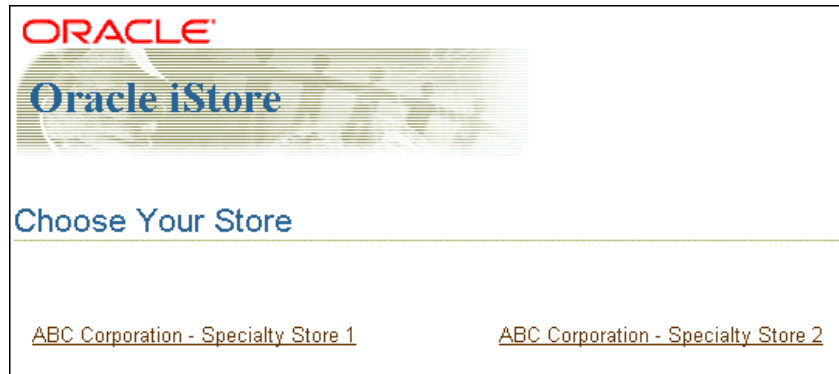
18.1.2.4 Accessing Preview Mode

You can access **Preview** mode in one of two ways:

1. Select the **Preview** button in the Stores, Sections, and Products pages, and then select the name of the specialty store you wish to preview. All products and sections, whether published or unpublished, will display.
 - **Preview from Stores pages:** Select **Preview** to bring up a list of specialty stores within the store. Or, if only one specialty store exists within the store, you will immediately see the Store Home Page for the specialty store.
 - **Preview in Products pages:** Select **Preview** to view the product detail page for that product. If more than one store or specialty store includes the product, you will need to first select a specialty store from the list that appears.
 - **Preview in Section pages:** Select **Preview** to be taken to the specific section page. If more than one store or specialty store includes the section, you will need to first select a specialty store from the list that appears.

The figure below shows how the Preview mode might look in an implementation of Oracle iStore.

Figure 18–1 Preview Mode Example



2. Navigate to the Customer UI url using the iStore Administrator responsibility. When the store manager (user with iStore Administrator responsibility) logs into the Customer UI while still logged into the Store Administration UI and using the same browser, he will be in Preview mode and will be able to see all stores, whether available to customers or not, and all products, whether published or unpublished.

Diagnostics and Troubleshooting

This section contains instructions on error corrections and troubleshooting for problems that you may encounter in configuration or administration of Oracle iStore 11i.

Main topics in this chapter include:

- [Oracle CRM Diagnostics](#)
- [Browser Cookies and Oracle Java Applications](#)
- [Setting up User-Level Logging](#)
- [Technology Stack Debugging](#)
- [Receiving Diagnostic Messages](#)
- [Store Administration UI Errors](#)
- [Customer UI Login Errors](#)
- [Display Manager Errors](#)
- [Catalog Errors](#)
- [Pricing Errors](#)
- [Search Errors](#)
- [Notifications Errors](#)
- [Lead Import Errors](#)
- [Fulfillment Errors](#)
- [Potential Issues Installing Oracle8i interMedia Text Version 8.1.7](#)

19.1 Oracle CRM Diagnostics

Oracle CRM Diagnostics is a tool that provides system integrators, consultants, and support analysts with a robust troubleshooting aids for diagnosing and troubleshooting Oracle 11i products.

The diagnostic tests provided as part of the Oracle Diagnostics Support Pack gather information and perform a set of tests on that information. The results include the output of information gathered, the results of the tests and appropriate actions to take. The tests provided do not alter data or setup.

The Support Packs are updated and released on a monthly basis and include the latest updates to existing tests and all new tests that are available.

For more information, see **Note 167000.1** on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

19.2 Browser Cookies and Oracle Java Applications

Sometimes, clearing all browser cookies can solve errors that occur when accessing Oracle's Java-based applications. To do so, follow the steps relevant to the browser you are using.

19.3 Setting up User-Level Logging

Oracle iStore 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.

Important: 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 Customer UI user-specific logs for the PL/SQL layer are written in this directory.

19.3.0.1 Steps to Set up JSP/Java Level Logging

1. Set the profile option **IBE: Enable Debug** to **Yes** at user level for a user.

When a user logs in to the Oracle iStore 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`.

2. Note that the log directory in which Oracle iStore resides is specified in the **Jserv Property** file.

Example: If `Jserv.properties` has:

```
wrapper.bin.parameters=-Dserv.Logging.common.filename=D:\temp\ibe.log
```

at runtime you will have a log filename like:

```
D:\temp\ibe.log_3_1afaef486a7fd3aa8000_IBE.txt
```

19.3.0.2 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 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`.

19.4 Technology Stack Debugging

You may need to perform debugging on the Oracle CRM Technology Foundation technology stack. This might be necessary if, for example, you are receiving request time-out or login errors. If you have contacted Oracle Support, your support agent may ask you to set up the technology stack debugging.

In this case, in order to enable the Oracle CRM Technology Foundation logging trails, set the framework and service logging levels to **DEBUG**.

Note: For performance reasons, it is recommended that you only enable debugging on the technology stack if it is required.

For more information, see:

- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle CRM Technology Foundation User Guide*

19.5 Receiving Diagnostic Messages

When there is an Oracle iStore application error in the stores, such as an exception, Oracle iStore 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**.

19.6 Store Administration UI Errors

This section contains errors which may occur when using the Oracle iStore Store Administration UI.

Topics include:

- [Section 19.6.1, "Understanding Browser Reload Action"](#)
- [Section 19.6.2, "Section Hierarchy Errors"](#)
- [Section 19.6.3, "Reports Errors"](#)

19.6.1 Understanding Browser Reload Action

In the Store Administration UI, when a user clicks the Internet browser's Reload/Refresh button just after pressing the iStore **Apply** button, the browser does not just reload the page with the http "get" command, it **repeats the last action** (send the last request again). This means the browser will resubmit the form again with all the old form data. This may cause an error to display in the UI. It is recommended that the user not press the browser's Reload/Refresh button just after pressing the Apply button.

Explanation: All iStore tables have one column, `object_version_number`, to ensure that when a user submit a form, the data is not stale. If user submits the form again with all of the "old" form data by clicking the browser's Reload/Refresh button, sometimes an error will be shown to indicate that the object version number is not correct.

19.6.2 Section Hierarchy Errors

Use the following fix for the error listed below.

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, check the Web Status flag for the item. If the item is Disabled, it will not appear in the Store Administration UI.

19.6.3 Reports Errors

This section contains troubleshooting information on errors which may occur when accessing Reports in Oracle iStore. For information on setting up Reports, see [Chapter 15, "Implementing Reports"](#).

This section addresses the following:

- [Section 19.6.3.1, "Netscape Errors When Accessing Discoverer Reports"](#)
- [Section 19.6.3.2, "Real Player Initializes in IE 5.0+ when Accessing Discoverer Reports"](#)
- [Section 19.6.3.3, "Description Under Bins Not Aligned Properly"](#)
- [Section 19.6.3.4, "Discoverer Reports Tab Shows "Additional Steps Required" Message"](#)

19.6.3.1 Netscape Errors When Accessing Discoverer Reports

When accessing Discoverer reports in the Store Administration UI Reports tab, the following error may occur in Netscape:

```
Error: PL/SQL: numeric or value error: character buffer too
small
```

To fix the problem: Clear the browser cache and cookies, by doing the following:

1. In the Netscape Browser menu, navigate to **Edit > Preferences > Advanced > Cache**.
2. Click on the buttons **Clear Memory Cache** and **Clear Disk Cache**.
3. Close all Netscape browser windows and remove all cookies files from your PC:

On Windows, it might be present in <Netscape Directory> \ Users\
<NetscapeUserProfileName>\cookies.txt

Eg: C:\Program Files\NETSCAPE\Users\ "User_name"\cookies.txt

19.6.3.2 Real Player Initializes in IE 5.0+ when Accessing Discoverer Reports

When accessing Discoverer reports in the Store Administration UI Reports tab, Real Player may try to initialize.

To fix the problem: Clear the browser cache and cookies, by doing the following:

1. In the IE browser menu, navigate to **Tools > Internet Options**.
2. Select the **Delete Files** button.
3. In the **Delete Files** window, check **Delete all offline content** checkbox and select **Ok**.
4. Select the **Settings** button to open the Settings window.
5. Select **View Files** to open the Temporary Internet Files window. Select and Delete all cookie content in the window. The above steps delete all temporary files.
6. Close all IE browser windows.
7. Delete all the cookie files, for IE, for this Windows user.

Example: If the cookies for IE are stored under C:\Documents and Settings\<Windows Username>\Cookies directory, then delete all the files from this directory.

19.6.3.3 Description Under Bins Not Aligned Properly

When using Internet Explorer, the text underneath bins (in Bins subtab under Reports tab) may not be aligned properly. This error occurs because "write" directory permissions are not set in the directory \$APPL_TOP/html/cabo/styles/cache, and the DCF renderer cannot generate the proper cascading style sheet. To fix the error, set "write" privileges in the directory.

After making these changes, be sure to bounce the Apache with the Clear Cache option on.

19.6.3.4 Discoverer Reports Tab Shows "Additional Steps Required" Message

If the Discoverer Reports tab shows the following message:

Post installation/configuration steps are required to correctly run the reports

The exact cause of the error can be found in the JTF log files. Also, from Minipack IBE.N and onwards, the view source of the Discoverer Reports tab page should also give information on the issue.

To fix the issue:

1. Upload the eex files.
2. Set the values for the Discoverer profile options correctly.

Usually, this error happens because of the following reasons:

1. The **ICX: Default End User Layer Prefix** profile option (ICX_DEFAULT_EUL) has not been set properly. The profile option value might contain the LANG suffix too (e.g.: EUL4_US). This profile should contain value **without** the suffix, e.g., EUL4 (no US).
2. Oracle Applications Discoverer Reports are currently not supported for a language preference of the logged-in user other than American English.
3. IBE eex files have not been uploaded/error in importing the eex files: To check whether the IBE Workbooks have been uploaded or not, run the following query:

```
SELECT DISTINCT doc_developer_key FROM EUL4_US.eul4_documents WHERE doc_developer_key LIKE 'IBE%';
```

If the above query does not return any records, then eex import has not been done properly.

For more information:

Read Oracle MetaLink **Note 185342.1**, *Oracle Discoverer End User Layer (EUL) Release Notes*. **To obtain Note 185342.1:** Log into [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and query with **Note 185342.1** in the search utility.

19.7 Customer UI Login Errors

If a user is experiencing errors when trying to log in to a specialty store, the cause may be one of the following:

- You are logging in to Oracle CRM Applications at:

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

instead of the Customer UI at one of the following URLs:

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

`http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?site=<Store ID>`

- You are trying to log in with a store manager user name instead of a customer user name. Make sure the user name has an Oracle iStore customer responsibility such as IBE_CUSTOMER.

19.8 Display Manager Errors

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 Store Administration UI by searching for it by access name in the Store Administration UI.
- Verify if the template or media has the mapping for the specific store and language. If not, verify if the template or media has default mapping.
- 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 media was not defined and that a store level default also was not defined.

- Verify if any template or media is mapped to the product or section under the specified display style or content component.
- Verify if the template or media exists.
- Verify if the template or media has the mapping for the specific store and language. If not, verify if the template or media has default mapping.
- 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 content components are referenced in the runtime JSP.

- 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 Store Administration 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.

19.9 Catalog Errors

To troubleshoot Catalog errors, use the checkpoints or the following fixes for specific error messages.

This section contains:

- [Section 19.9.0.5, "Checkpoints"](#)
- [Section 19.9.1, "Specific Error Messages for Catalog"](#)

19.9.0.5 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>:<port>/html/jtfmain.htm`

This page has links to test the basic functionalities that Oracle iStore 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 does not show up in the Oracle iStore catalog, check the following points:
 - Oracle Marketing 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 has successfully displayed other types of eMerchandising postings, the problem may be due to an Oracle Marketing setup issue or other Oracle Marketing problem.

19.9.1 Specific Error Messages for Catalog

Use the following fixes and workarounds for the error messages listed below.

- [Section 19.9.1.1, "No Items in the Catalog"](#)
- [Section 19.9.1.2, "Items Do Not Have Prices"](#)
- [Section 19.9.1.3, "'Add to Cart' Buttons Do Not Appear"](#)
- [Section 19.9.1.4, "Please Refresh Your Shopping Cart"](#)
- [Section 19.9.1.5, "ORA-20000: APP-11027: Mandatory Segment: 'COUNTY'"](#)

19.9.1.1 No Items in the Catalog

- Check the following profile options:
 - 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**
- 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 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.
- Check that the items have not been explicitly excluded from the store.

19.9.1.2 Items Do Not Have Prices

- Check the following profile options:
 - IBE: Pricing Event—Before Shopping Cart
 - IBE: Request Type to get a Price (for pre-11.5.8 only)
 - IBE: Use Price list associated with Specialty Store
- Confirm that items are in the store price list.
- Confirm that the store 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 passes to the Pricing engine: price list ID, currency code, inventory item IDs, UOM codes, price request type, and pricing event. Oracle iStore 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 prices for model bundles do not display, make sure the model bundles are set up correctly as described in [Section 21.3, "Setting up Oracle Bills of Material"](#).
- If items for model bundles do not display and you are running a multi-org setup, then make sure that you have copied the bill to all of the appropriate organizations. When you create a bill, it exists only in the current organization.
- 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

19.9.1.3 “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 the Web checked 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 either have the Oracle Configurator UI setup or follow the model bundle setup. Otherwise, it will be treated as a standard item.
- Check the value of the profile option, IBE: Use Add Item Bin -- it should be set to Yes.
- Check that the item’s Inventory flag, Orderable on the Web, is set to Yes.

19.9.1.4 Please Refresh Your Shopping Cart

This error may occur when customers try to add items to a cart and the **ASO: Default Quote Status** profile option is not set properly.

To fix the error, set the profile option **ASO: Default Quote Status** --- Set this to **Store Draft** at the iStore application level.

This profile option determines the default quote status of an iStore shopping cart. The default quote status of Store Draft is hard coded into the iStore application beginning in release 11.5.8, but you should check the value of this profile and ensure that it is set properly. Once ordered, carts move to the Quoting status of Order Submitted. If a user requests sales assistance, the cart moves to the Quoting status of Draft. Depending upon the sales representative’s actions, the cart/quote can move into other statuses as well.

19.9.1.5 ORA-20000: APP-11027: Mandatory Segment: "COUNTY"

The following SQL error occurred: ORA-20000: APP-11027: Mandatory segment: "COUNTY".

This is an error that can occur with flexible addresses when address validation is turned **off**.

The error message means that the mandatory segments of an address -- such as city or state -- are missing. It is possible that the address is created where address

validation is not required, or from another application which does not verify all the information in the address.

To remove the error, set address validation on. To check whether address validation is on, do the following:

1. Login to Oracle Forms using **Receivables Manager** responsibility.
2. Navigate to **Setup > System > System Options**.
3. Open the **Tax** tab and check the value for **Address Validation**. Validation is **on** if it's set to **Error**.

If the address validation is turned off and the location flexfield is `city.county.state`, the Accounts Receivables API tries to calculate tax based on city, county, and state during checkout. If the mandatory information is missing from the address, a user will see the error.

19.10 Pricing Errors

To troubleshoot Pricing errors, use the following checkpoints and debugging procedures.

See also: [Chapter 9, "Implementing Pricing"](#)

19.10.0.6 Checkpoints

Use the following checkpoints to troubleshoot pricing in Oracle iStore.

- If you want to use the Oracle Pricing engine to determine which price list to use in Oracle iStore, then set the profile option **IBE: Use Price List associated with Specialty Store** to **No** at the iStore application level.
- When you create a new modifier, run the Build Sourcing Rules concurrent program with the Pricing Manager responsibility.
- Check that the profile options, **IBE: Pricing Event for Shopping Cart** and **IBE: Pricing Event--Before Shopping Cart**, are set as mentioned in [Section 4.3.3, "Set Mandatory Customer UI Profile Options"](#).

19.10.1 Generating a Pricing Debug Trace

You can generate a pricing debug trace to create detailed log files when Oracle iStore calls the Oracle Pricing engine. Oracle iStore 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 Quoting, 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 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 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.

19.11 Search Errors

To troubleshoot Search errors, use the following checkpoints:

- Check that Concurrent Manager is up and running.
- If searches are inaccurate, verify that interMedia was set up correctly. Refer to [Section 19.15, "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 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 19.15, "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 product search.

If the query returns search results instead, then file a bug on Oracle iStore (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 Store Administration UI" when you try to perform a product search in the Store Administration 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).

19.12 Notifications Errors

Use the following fix for the error listed below.

19.12.0.1 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-related Oracle Workflow definition before upgrading Oracle iStore. 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-related Oracle Workflow definitions.

19.13 Lead Import Errors

This section contains troubleshooting information for Oracle iStore's Lead Import functionality, which captures customer data from iStore orders and expired carts and makes them available in Oracle Sales Online and Oracle TeleSales.

19.13.0.2 Leads Have No Owner

If leads retrieved in Oracle Sales Online or Oracle TeleSales have no owner, check the value of the profile option, **OS: Assign New Lead**. This profile option attempts to assign a sales representative as the owner of a batch of leads.

- See [Section 27.4.1, "Oracle Sales Profile Options Required for iStore Lead Import"](#), for details.

19.13.0.3 Lead Data Overlaps

If the data in your leads overlaps or shows duplicate records, you may not have synchronized the iStore Lead Import Concurrent Program Set schedule and the interval profile options which also control how often the concurrent program set runs.

- See [Section 27.5.3.1, "Best Practice for iStore Lead Import Concurrent Program Set"](#), for details.

19.14 Fulfillment 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.

19.14.0.4 Order Summary Page Records Out of Sequence

If the order summary page records are out of sequence, use search to locate an order.

19.14.0.5 Order Feedback Queue Errors

If you are experiencing order feedback queue errors, see *Oracle Quoting Implementation Guide* for troubleshooting instructions.

19.15 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.

19.15.1 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 use SQL*Plus internally.

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.

19.15.2 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.

Part V

Integration of Oracle Products

This section details the tasks required to integrate Oracle iStore 11*i* with its conditional dependencies.

For the tasks required to integrate Oracle iStore with its mandatory dependencies, see [Chapter 2, "Before You Begin"](#).

This part contains the following chapters:

- [Chapter 20, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#)
- [Chapter 21, "Integrating Oracle iStore with Oracle Bills of Material"](#)
- [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#)
- [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#)
- [Chapter 24, "Integrating Oracle iStore with Oracle iSupport Call-Me-Back Functionality"](#)
- [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#)
- [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#)
- [Chapter 27, "Integrating Oracle iStore with Oracle Sales Applications"](#)
- [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#)
- [Chapter 29, "Integrating Oracle iStore with Oracle Shipping Execution"](#)
- [Chapter 30, "Integrating Oracle iStore with Oracle*9i*AS Web Cache"](#)
- [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#)

Integrating Oracle iStore with Oracle Advanced Supply Chain Planning

This chapter describes the integration of Oracle iStore 11i with Oracle Advanced Supply Chain Planning.

Main topics in this chapter include:

- [Overview of Oracle Advanced Supply Chain Planning](#)
- [Setting Up Oracle Advanced Supply Chain Planning](#)

More information on ATP and Oracle iStore can be found in the white paper, *Multi-Org ATP and Fulfillment with iStore 11i*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

20.1 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

20.2 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.

20.2.1 Setting up Global Available to Promise (ATP)

Oracle iStore can provide regular available to promise (ATP) information on inventory items without customization. For more information, see [Section 6.4, "Providing Regular Available to Promise \(ATP\)"](#).

If you want to enable global ATP for Oracle iStore, you must install Oracle Advanced Supply Chain Planning and Oracle Material Requirements Planning.

Integrating Oracle iStore with Oracle Bills of Material

This chapter describes the integration of Oracle iStore 11i with Oracle Bills of Material.

Main topics in this chapter include:

- [Overview of Oracle Bills of Material](#)
- [Oracle iStore Functionality with Oracle Bills of Material](#)
- [Setting up Oracle Bills of Material](#)

21.1 Overview of Oracle Bills of Material

Oracle Manufacturing and Oracle Order Management use Oracle Bills of Material (BOM) to store lists of items (products) associated with a parent item and information about each item's relationship with its parent.

Oracle Bills of Material supports the following types of bills of material:

- Standard
- Models
- Option class
- Planning

21.2 Oracle iStore Functionality with Oracle Bills of Material

You can use Oracle Bills of Material to set up configurable models, model bundles, and items with standard warranties for sale in your stores. This chapter addresses only the setup of **model bundles** in Oracle iStore using Oracle Bills of Material.

For information about creating bills of material for other types of products, see *Oracle Bills of Material User's Guide* and *Oracle Inventory User's Guide*. For more information on setting up configurable items, see [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#).

21.2.1 Overview of Model Bundles

The Oracle iStore product catalog supports model bundles. A model bundle is a pre-configured model item in which all components (option classes) are mandatory.

A model bundle exists in Oracle Inventory and Oracle Bills of Material as follows:

- In Oracle Inventory, one model item is the top item in the model bundle. Option classes represent every other item in the model bundle.
- In Oracle Bills of Material, the model item's bill lists every option class as a mandatory component. Each option class's bill lists only one item as an option.

From the customer perspective, the model bundle consists of the Oracle Inventory model item and the items listed on the option class bills in Oracle Bills of Material.

Use a model bundle only when revenue recognition at the component item level is required. Otherwise, use a standard item for better performance.

21.2.2 Model Bundle Display in the Catalog

The catalog display of model bundles is similar to standard item display.

Model bundle products are displayed in the catalog as follows:

- The catalog display price is the sum of the prices for the model bundle's model item and other components, including option classes and items.
- In section pages, a model bundle is listed with the descriptions of its model item. The model bundle's other components are not listed.
- In a section page with single item selection, an **Add to Cart** button appears next to a model bundle.
- In a section page with multiple item selection (which normally appears with items listed in a pull-down menu), an **Add to Cart** button appears next to a

model bundle. Customers cannot include a model bundle when selecting multiple items for addition to their carts.

- Model bundles do not appear in the menus unless Express Checkout is turned off.
- The item detail page displays descriptions of the model bundle's model item and lists the model bundle's components.
- Express Checkout is not available for model bundles.

21.2.3 Model Bundle Display in the Shopping Cart

The shopping cart display of model bundles is similar to standard item display.

Model bundle products are displayed in the shopping cart as follows:

- A model bundle appears as one line in the shopping cart.
- A **Bundle Details** link appears in the shopping cart line. Clicking it displays a list of the model bundle's items.
- If a customer wants to use a commitment for the model bundle at checkout, he or she can only apply an open commitment. See [Section 9.10.2, "Using Line Level Commitments"](#), for more information on commitments.

21.2.4 Model Bundle Pricing

A model bundle's price is the sum of the prices for the model item and other component items.

You can set up pricing for a model bundle component in one of the following ways:

- The component's price varies depending on whether the component is purchased separately or as part of a model bundle.
- The component's price is always the same.

Use the pricing attribute Model Id to allow variable component pricing depending on whether it is purchased separately or as part of a particular model. When the component is purchased separately, no pricing attribute is passed to Oracle Pricing. When the component is purchased as part of a model, the model ID is passed to Oracle Pricing as the pricing attribute Model Id.

Model bundle pricing is available only for the model item's primary unit of measure (UOM).

Example 21–1 Pricing Model Bundle Components

The item Java Book has the following pricing:

- \$20 when purchased separately
- \$5 when purchased as part of a Java course

To establish this pricing, the price list must have two lines for the item Java Book:

- Java Book \$20
- Java Book \$5, Model Id = Java course's model ID

21.3 Setting up Oracle Bills of Material

Use the following procedure to create a model bundle. See [Section 2.10, "Setting up Oracle Inventory"](#) for more details about creating store products.

Prerequisites

- Set up the Oracle Configurator servlet as described in [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#) and *Oracle Configurator Installation Guide*. Oracle iStore uses the Oracle Configurator servlet to retrieve model bundle information. You do not need to create Configurator UIs for model bundles.
- Set the profile option **BOM: Configurator URL of UI Manager** to Oracle Configurator Servlet URL. Set the profile option at site, application, and IBE_CUSTOMER responsibility levels. Remember, if you are implementing multiple organizations, you will have more than one customer responsibility. Be sure to set the profile option for all customer responsibilities for all organizations. See [Section A.21, "Oracle Configurator/Bills of Material Integration Profile Options"](#), for details.

Responsibility

Inventory

Login

Oracle Forms

Steps

1. Login to Oracle Forms with Inventory responsibility. In Oracle Inventory, create the model bundle's model item with the following settings:

- In the Bills of Material tab:
 - BOM Allowed = **Yes** (checked)
 - BOM Item Type = **Model**
- In the Work In Process tab:
 - Build In WIP = **No** (unchecked)
 - Supply Type = **Push**
- In the Order Management tab:
 - Pick Components = **Yes** (checked)

Note: Remember that pricing for a model bundle is available only for the model item's primary UOM.

2. In Oracle Inventory, create the model bundle's option classes with the following settings:
 - In the Bills of Material tab:
 - BOM Allowed = **Yes** (checked)
 - BOM Item Type = **Option Class**
 - In the Work In Process tab:
 - Build In WIP = **No** (unchecked)
 - Supply Type = **Phantom**
 - In the Order Management tab:
 - Pick Components = **Yes** (checked)
3. In Oracle Inventory, create the model bundle's non-model items with the following settings:
 - BOM Allowed = **Yes** (checked)
 - BOM Item Type = **Standard**

These items will be included in the option classes' bills in Oracle Bills of Material.

4. In Oracle Bills of Material, create a bill for each option class in the model bundle. Each option class bill should have only one item.

Note: To ensure that prices are displayed and calculated for the model bundle's items, make the items in the option class bills **optional**. Oracle Order Management does not price items in a model bundle if they are mandatory.

5. In Oracle Bills of Material, create a bill for the model bundle's model item. Include the model bundle's option classes in the bill as mandatory components.
6. When you create a bill, it exists only in the current organization. If you are implementing multiple organizations, copy the bill to your other organizations, or reference the bill as a *common* bill. See *Oracle Bills of Material User's Guide* for additional details.
7. In Oracle Pricing, set up pricing for the model bundle's items. If you want an item to have different prices depending on whether it is included in a model bundle, use the pricing attribute Model Id as described in [Section 21.2.4, "Model Bundle Pricing"](#).
 - The model bundle's model item should have a price of zero, without any modifiers.
 - The model bundle's option classes should have prices of zero, without any modifiers.
 - The items in the option classes' bills should be set up with prices and any applicable modifiers.
8. If you have set up a pricing attribute for an item, you must run the Build Sourcing Rules concurrent program to generate and display the correct prices. Follow the directions in *Oracle Pricing User's Guide*. Restart the Apache server after the concurrent program completes.

See Also

- *Oracle Bills of Material User's Guide*
- *Oracle Inventory User's Guide*
- *Oracle Pricing User's Guide*

Integrating Oracle iStore with Oracle Configurator

This chapter describes the integration of Oracle iStore 11i with Oracle Configurator.

Main topics in this chapter include:

- [Overview of Oracle Configurator](#)
- [Creating Configurable Product Models](#)
- [Oracle iStore Functionality with Oracle Configurator](#)
 - [Section 22.3.1, "Customer UI Configurator Business Flow"](#)
 - [Section 22.3.4, "Using Solution-Based Modeling"](#)
- [Setting up Oracle Configurator](#)
- [Testing the Oracle Configurator Setup](#)
- [Troubleshooting Oracle Configurator Integration](#)

22.1 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.

22.2 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, 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).

22.3 Oracle iStore Functionality with Oracle Configurator

Oracle iStore allows users to configure items by retrieving the Configurator module through the Customer UI. This functionality is discussed in this section; topics include:

- [Section 22.3.1, "Customer UI Configurator Business Flow"](#)
- [Section 22.3.2, "Retrieving the Configurator UI"](#)
- [Section 22.3.3, "Changing the Oracle Configurator UI"](#)
- [Section 22.3.4, "Using Solution-Based Modeling"](#)

22.3.1 Customer UI Configurator Business Flow

The following is the business flow for configuring items in the Customer UI.

1. When the customer is browsing items in an Oracle iStore 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.
2. 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 page. Here, the related or dependent products can be assembled for placing the order.
3. 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.
4. If a configured item in the cart is incomplete, then the configurable product name will be displayed with an asterisk (*), and a *Must complete configuration before checkout* message will be displayed below the shopping cart.
5. In the shopping cart, the user can update the quantity for the top level item.

Note: Launching Oracle Configurator from Oracle iStore 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.

22.3.2 Retrieving the Configurator UI

Oracle iStore 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 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.

22.3.3 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 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'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.

22.3.4 Using Solution-Based Modeling

Oracle Configurator Developer allows users to create configuration models using Oracle Inventory items and pre-existing ATO/PTO models, and to allow runtime users to order such models through Oracle iStore -- this is the goal of Solution-Based Modeling.

With Developer-created models, configuration users can create multiple instances of a configurable model component, with each model component configured differently -- this is known as *multiple instantiation*. In Oracle iStore, multiple instantiation enables Customer UI users to add components during their user session, adding and configuring as many separate components as needed. Oracle iStore displays and prices each sub-model according to its individually selected options.

Note that this does **not** require integration with Oracle Advanced Pricing.

To allow Oracle iStore (and Oracle Quoting) to distinguish between multiple instances of a component, the field `aso_quote_line_details.config_item_id` is used. When cart (quote) lines are added to a cart (quote) from a saved configuration, this field is populated with the `config_item_id` from `aso_i_config_details_v.config_item_id`.

Oracle iStore prices a configuration together with the rest of the cart lines. When pricing the restored/reconfigured configuration, the current option selections are matched with the previously saved cart lines. To accomplish the re-pricing, Oracle

iStore uses the Oracle Configurator columns --- **config_item_id** and **parent_config_item_id** --- in the **cz_pricing_structures** table. These columns contain unique, temporary values for the newly selected items. The **config_item_id** column has appropriate values for the items existing in the saved configuration. The **config_item_id** column corresponds to the **configuration_id** column in Oracle Order Management.

For more information, see the *Oracle Configurator Implementation Guide* and the *Oracle Configurator User Guide*.

22.4 Setting up Oracle Configurator

Use the following procedure to set up Oracle iStore 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 (a) site, (b) iStore

application, and (c) IBE_CUSTOMER responsibility level to the Oracle Configurator Servlet URL:

```
http://<host>:<port>/<servlet zone>/oracle.apps.cz.servlet.UiServlet
```

The values for the host, port, and servlet zone are determined by your Apache server configuration.

- See [Section A.21, "Oracle Configurator/Bills of Material Integration 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.21, "Oracle Configurator/Bills of Material Integration Profile Options"](#), for more information about this profile option.
 5. Set the profile option **OM: Use Configurator** to **Yes** at the site level. This profile option is necessary for successful order placement.
 6. 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
 7. 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>:<port>/OA_
HTML/US/czFraNS.htm
wrapper.bin.parameters=-Dcz.uiservlet.templateurl.ie=http://<host>:<port>/OA_
HTML/US/czFraIE.htm
```

8. In the Oracle iStore Store Administration UI, add the model item to some part of the catalog to be displayed.

22.5 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>:<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">CB3E55CF36C0AECD
                </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.

22.6 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 Java log file as diagnostic tools.

22.6.1 The Initialize and Terminate Messages

The Oracle iStore 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 22.6.2, "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>
```

22.6.2 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 specialty store 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). In Oracle Configurator Developer, check that the model is in Complete status and includes Oracle iStore (IBE) as an application, then publish the Configurator UI. If the user's application ID is something other than 671 for Oracle iStore, 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 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 22.5, "Testing the Oracle Configurator Setup"](#).
- Check that the Oracle Configurator HTML pages exist by navigating to:

`http://<host>:<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 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 by using the Configurator Standalone Test Page described in [Section 22.5, "Testing the Oracle Configurator Setup"](#). If you have the initialize message from the Oracle iStore 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 22.4, "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 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 with Oracle Content Manager

This chapter details Oracle iStore 11i's integration with Oracle Content Manager (OCM) to provide a full range of content creation, collaboration, approvals, versioning, and web publishing functionality.

Main topics in this chapter include:

- [Oracle Content Manager Overview](#)
- [Oracle iStore Functionality with Oracle Content Manager](#)
- [Implementing Oracle iStore-Oracle Content Manager Integration](#)
- [Store Administration Behavior with OCM Integration](#)
- [Usage Summary Pages](#)
- [Concurrent Program to Migrate Data](#)

23.1 Oracle Content Manager Overview

Oracle Content Manager (OCM) is an integrated content management system for Oracle's E-Business Suite. OCM provides content management building blocks and manages unstructured data through create, approval, publish, and release lifecycles. OCM has a central repository that manages folders, versions, and translations, and enables an organization to collaboratively work on content with associated workflows.

See the Oracle Content Manager implementation and user guides for more information.

23.1.1 Oracle Content Manager Key Features

Oracle Content Manager (OCM) key features and benefits include:

- **Content creation** --- *Content items*, which can be re-used in other applications, can be created and maintained.
- **Content types** --- Data is organized into *Content Types*, which are logical sets of attributes and attachments defining the required building blocks of a content item. See [Section 23.1.3, "Oracle Content Manager Content Types"](#), for more details.
- **Seeded content items** --- OCM provides some seeded content items. Seeded content items cannot be modified. An example of a seeded content item is a stylesheet.
- **Content management** --- Existing content items can be updated from the OCM application.
- **Security** --- Roles allow different users to possess varying degrees of permissions within the application. (These are separate from Oracle E-Business Suite roles.) See [Section 23.1.2, "Oracle Content Manager Security"](#), below, for details.
- **File attachments** --- Attachments allow separate files to be linked to a content item. Attachments can be any type of files, such as text files, or binary files.
- **Stylesheets** --- A content type, stylesheets tell an application's rendering engine how to display a content item to a calling application. Each content type may have several stylesheets associated to it. Individual stylesheets are stored in the repository like any other content item.
- **Collaboration** --- Users worldwide can collaborate on content which is stored and accessed centrally.
- **Versioning** --- A versioning system allows multiple versions and the ability to return to previous versions.
- **Translations** --- Translation functionality allows users to upload translated content to create content items in multiple languages.
- **Approvals** --- OCM contains seeded approval processes which leverage Oracle Workflow to send e-mail notifications to users, communicating about the status of content items.
- **Working Folder/Directory** --- Access to content also is controlled through the use of folders, also called directories. Users can be awarded access to several folders. Default folders can be assigned at site, application, and responsibility

levels. A user's workgroup/working folder is the area that the user has access to in order to manipulate content items. Users can only view the directories and sub-directories to which they have been provided access.

- **Base language** --- OCM has the concept of a single base language. The base language determines the language that content is created in. Any other languages beyond the base language need to be entered through the translation UI.

To learn more about the Oracle Content Manager application, see the *Oracle Content Manager Implementation Guide* available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

23.1.2 Oracle Content Manager Security

Oracle Content Manager provides several roles and permissions which can be awarded to users in OCM to control access to the content.

The permissions include:

- Create/Update/Remove/Restore content (single permission)
- Approve content
- Translate content
- Delete

On a user-type level, these OCM permissions are grouped into roles, as follows:

Note that these roles are theoretical only; these are not actual roles that are seeded, but listed here for conceptual information purposes. These are the types of roles that you can create for your users using the seeded OCM permissions.

1. Content Administrator

The content administrator is a super-user who can perform all tasks within Oracle Content Manager, including managing security and awarding permissions to other users.

2. Content Creator

The content creator can create, restore, update, and soft delete content items.

3. Content Translator

If translation is required, the content translator defines translation for content items.

4. Content Approver

The content approver approves content items.

For more information, see the *Oracle Content Manager Implementation Guide*.

23.1.3 Oracle Content Manager Content Types

In OCM, *content types* are logical sets of attributes and attachments which define the required building blocks of a content item. Content types ensure content consistency and capture meta data. Meta data describes how and when and by whom a particular set of data was collected, and how the data is formatted. Content types are not file types. Examples of content types may include: images, white papers, sales presentations, feature articles, and stylesheets.

Some content types are seeded in the application. The seeded types cannot be altered, but you can copy a content type and modify the duplicate. You also can create new content types.

23.1.4 Implementing Oracle Content Manager

Set up Oracle Content Manager according to the *Oracle Content Manager Implementation Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

23.2 Oracle iStore Functionality with Oracle Content Manager

Oracle iStore users can integrate with Oracle Content Manager (OCM) to leverage OCM's ability to create, version, approve, and manage content items from within the Oracle iStore Store Administration UI. This content then can be used with existing Oracle iStore media objects and content components functionality to present the content in the Oracle iStore Customer UI.

Integration with OCM provides the following benefits:

- A clear division of tasks among content creators, content translators, content approvers, and the store administrator
- Store administrators can preview content items before publishing them to a store
- Content versioning
- Translation mechanisms
- Approval processes

Depending upon the permissions awarded, the store administrator can be both a content creator and approver. Users with iStore administrator responsibility can be granted all of the privileges supported by Oracle Content Manager to create and approve content items.

Note: The profile option, **IBC: Use Access Control**, controls whether user permissions are checked in the OCM pages. See [Section 23.3.3, "Step 3 - Set Profile Options"](#), and [Section 23.3.5, "Step 5 - Grant OCM Privileges to Store Administrator"](#), for more details.

Important: Following the integration, the Store Administration UI and related content functionality will change. See [Section 23.3, "Implementing Oracle iStore-Oracle Content Manager Integration"](#), for details.

23.2.1 OCM Integration Key Terms and Definitions

The following key terms and definitions relate to content management using Oracle Content Manager and/or Oracle iStore content management functionality:

1. **Content Type** --- A logical set of attributes and attachments related to a content item. See [Section 23.1.3, "Oracle Content Manager Content Types"](#), for more information.
2. **Content Item** --- Data of a certain content type. For example, if a "feature article" is a content type, then the specific article entitled, "Selecting the Right DB for your Company", is the content item.
3. **Attribute** --- A piece of data that makes up a Content Type. An Attribute is of data type text, date, number, etc. For example: "Title" is an attribute of the content type, "Feature article". An Attribute can have the following data formats: text, date, number, boolean, HTML, and URL, based on the OCM UI.
4. **Live Version** ---The Live Version is the version that is linked to a media object in the Store Administration UI. Oracle iStore does not check whether the section or product that includes the media object is Published or Unpublished.
5. **Media Object** --- Media objects are logical content holders for displaying media files, such as images and html content. Each media object maps to a physical (electronic) content item/file to present content in the Oracle iStore Customer UI.

Without OCM integration, Oracle iStore media object functionality allows you to control the files/content items that you want to display in a specific store and for a specific language. With OCM integration, no mapping is made at the language level, but rather, you select the content item in the language desired

(after it has been translated). See [Section 8.5, "Understanding Media Objects"](#), for more information on Oracle iStore's media objects functionality. See the *Oracle Content Manager User Guide* for more information on translating content and selecting translated files.

6. **Content Component** --- Formerly called multimedia components, content components are placeholders for types of content that can be used in the catalog pages for sections and products. See [Section 8.4, "Understanding Content Components"](#), for more information.
7. **Class** --- Media objects and content components are organized by their purpose, which is designated by their Class. The class concept replaces the previous Applicable To designation used to classify media objects and content components. See [Section 8.3.2, "Media Objects and Content Components Classes"](#), for more information.
8. **iStore Object** --- For content purposes, an iStore object is a section, product, or media object associated to a content item.

23.2.2 Architecture and Integration Points in Oracle iStore-OCM Integration

This section contains information on the architecture and integration points of the integration between Oracle iStore and Oracle Content Manager.

23.2.2.1 Architectural Overview

The following components are involved in content management with OCM integration:

- **Oracle Content Manager** --- Allows users to create and update content, translate content, submit content for approval, and approve content.
- **Store Administration UI** --- Oracle iStore's administration UI allows store administrators to select content and associate it with media objects and content components, preview content, and publish content.
- **Oracle iStore Customer UI** --- Display content items in the specialty stores.

23.2.2.2 Integration Points

All content item information -- other than content item association to iStore objects (e.g., products, sections, and media objects) -- is stored in the Oracle Content Manager schema.

Oracle iStore-Oracle Content Manager integration points are as follows:

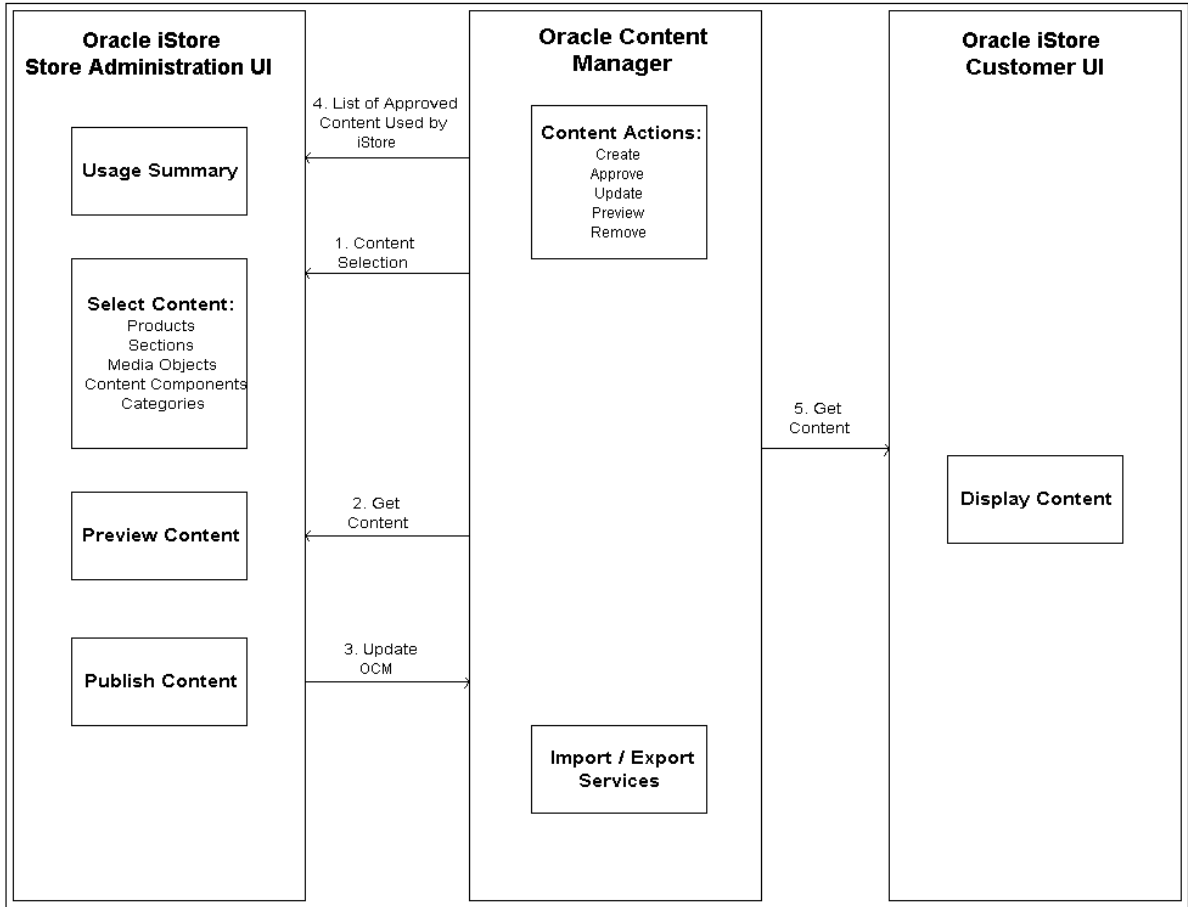
1. **Oracle APIs** --- An API layer allows a variety of Java and SQL communications between Oracle iStore, Oracle Content Manager, and the database.

For information on the public APIs, see the *Oracle iStore API Reference Guide* and the Oracle Content Manager API documentation.

- **Retrieve and Update Content** --- Store Administration UI and Oracle Content Manager APIs allow Oracle iStore to get the latest content from OCM data tables, and to communicate updates to that content.
 - **Retrieve Published Content** --- Oracle iStore Customer UI public APIs call OCM APIs to get the correct version of content items and display them in the specialty stores. Only content items which are published through the Store Administration application will display in the Oracle iStore Customer UI.
2. **Content Storage, Searching, and Retrieval** --- Any number of content items can be stored in the OCM schema. Content items within the OCM working folder are available to the store administrator in the Store Administration application. Store administrators can view summaries of content used in the stores, search for content items, approve content, translate content, and delete content. These abilities depend upon the OCM permissions awarded the administrator and the OCM setup, including the value of the profile option, **IBC: Use Access Control**.
 3. **Content Association to iStore Objects** ---The association of content items and media objects is stored in the Oracle iStore schema. The store administrator can create and update associations only from iStore's Store Administration UI. The administrator will be able to select all Approved content items available in the Library subtab.
 4. **Content Management** --- The OCM schema stores the content item version published in the Oracle iStore Customer UI. OCM's integration with Oracle Workflow allows e-mail notification of content approval processes.

The following diagram shows the integration points between the two applications.

Figure 23–1 Oracle iStore-Oracle Content Management Integration Points



23.2.3 Business Flows for Oracle iStore-OCM Integration

The following is the high-level business process flow for content management in Oracle iStore, when integrated with OCM.

1. Content item is created.

With the required permissions, the store administrator can create content items in the Store Administration UI. If he does not, the content creator creates content items in OCM.

2. Content item is submitted for approval.

In the Store Administration UI, the **Submit** button in the **Create Content: Content Detail** page submits the content item into the approval stage.

3. Content item is approved.

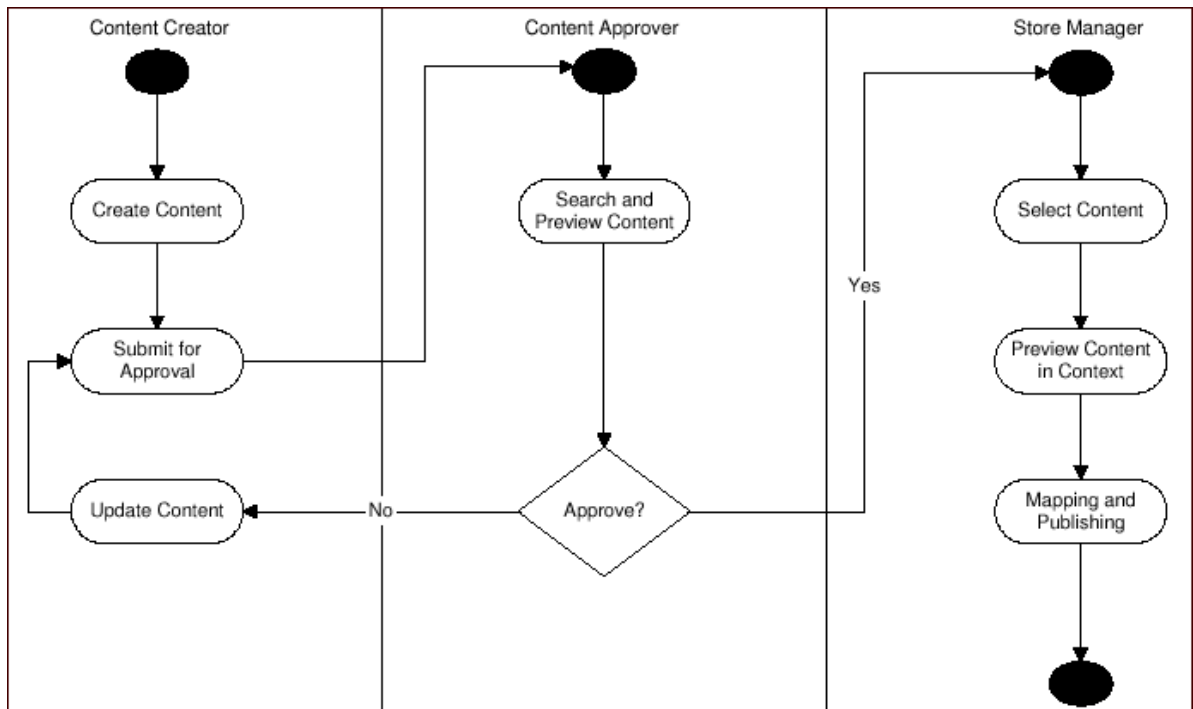
If the store administrator has the OCM Approve permission, the content is automatically approved --- if not, another user (with the permission) can use the Store Administration UI or the OCM UI to approve the content.

4. Content item is associated to an iStore object.

The store administrator uses the Store Administration UI to assign Approved content items to iStore objects (products, sections, or media objects).

The following figure shows the flow.

Figure 23–2 Oracle iStore-Oracle Content Manager Business Flow



23.3 Implementing Oracle iStore-Oracle Content Manager Integration

Integration with Oracle Content Manager is optional.

Note: This section assumes you have installed Oracle iStore and Oracle Content Manager, and performed any required post-installation steps.

CAUTION: Once you integrate Oracle iStore with Oracle Content Manager, you **cannot undo** the integration.

The following are the implementation steps:

1. [Step 1 - Migrate Attachments from File System to Database](#)
2. [Step 2 - Run Data Migration Concurrent Program](#)
3. [Step 3 - Set Profile Options](#)
4. [Step 4 - Modify Oracle iStore Menu](#)
5. [Step 5 - Grant OCM Privileges to Store Administrator](#)
6. [Step 6 - Test Oracle iStore-OCM Integration](#)

23.3.1 Step 1 - Migrate Attachments from File System to Database

Oracle Content Manager does not support storing files in the file system. Therefore, you must migrate any attachments (files used in iStore) from the file system to the database. Use the following procedure.

1. Log in to the Oracle iStore Store Administration UI as the store administrator.
2. Manually change the URL to:
`http://<host>:<port>/OA_HTML/ibemdmgt.jsp`
3. In the file system to database lob migration screen that appears, press the **Migrate** button to migrate attachments.

23.3.2 Step 2 - Run Data Migration Concurrent Program

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, **iStore Oracle Content Manager Integration Migration**.

Both existing customers and new customers who want to use the OCM integration must run the concurrent program **one time** as a mandatory step to migrate the seed and customer data.

Important: Please make sure the profile option, **IBC: Use Access Control**, is set to **No** at site level before running the data migration concurrent program.

Note: When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets the profile option, **IBE: Use Content Management Integration**, to **Yes** at the iStore application level.

See [Section 23.6, "Concurrent Program to Migrate Data"](#), for details.

23.3.3 Step 3 - Set Profile Options

Set the following profile options:

1. **IBC: Folder/Directory for New Items** --- Set at site level, using the value, **iStore Directory**. Setting this profile option allows the store administrator to access the correct OCM folder.

See the *Oracle Content Manager Implementation Guide* for additional details.

2. **IBC: Use Access Control** --- Set at site level (the only allowable setting). This profile option specifies whether permission/privilege checking is performed in the OCM pages.

Set to **No** to not use any permission checking in the OCM pages. This is the recommended setting --- unless you are going to use privilege checking for store administrators.

Set to **Yes** to use privilege checking. If set to Yes, additional privileges must be awarded the iStore administrator. See [Section 23.3.5, "Step 5 - Grant OCM Privileges to Store Administrator"](#), and the *Oracle Content Manager Implementation Guide* for additional details.

3. **IBE: Number of Days for Expiring Content** -- Set to an integer at iStore application level. If integrating with OCM, the **Usage Summary** page in the Store Administration UI performs a default search of content items based on the number of days defined in this profile option. Oracle iStore reads the value of this profile option (x) and includes only those content items whose expiration date is that number of days (x) or less from system date (current date).

This profile option defaults to **Null** if not set. If left at the default value of Null, the search results will include all content, regardless of expiration date.

For more information on the Usage Summary pages, see [Section 23.5, "Usage Summary Pages"](#).

Bounce the Apache server after making these profile option settings.

23.3.4 Step 4 - Modify Oracle iStore Menu

In order for the Oracle Content Manager subtabs to appear within the Store Administration UI's **Content** tab, you must replace the default Store Administration UI Content tab with the Oracle Content Manager integrated menu. Use the following steps.

Important: Avoid using the seeded SYSADMIN user to log into Oracle Forms and make the menu prompt changes. Use another user to login and make the changes.

1. Log in to Oracle Forms as a user other than SYSADMIN, using **Application Developer** responsibility.
2. Navigate to **Application > Menu**. The **Menus** window opens. Use the Menus functionality to do the following:
3. Within the **iStore Merchant Root** menu (**IBE_M_MENU_ROOT**):
 - a. Remove the **Content** prompt from submenu **iStore Content** tab (**IBE_M_CONTENT**).
 - b. Set the **Content** prompt to submenu **iStore and iContent Content** tab (**IBE_M_CONTENT_IBC**).
 - c. Save the changes.
4. Remember to bounce the Apache server after making these changes.

For instructions on how to modify menus and functions, see: *Oracle Applications System Administrator's Guide*.

23.3.5 Step 5 - Grant OCM Privileges to Store Administrator

If the profile option, **IBC: Use Access Control** is set to **Yes**, you must grant OCM privileges to the store administrator(s). Log into Oracle Content Manager with the OCM Superuser responsibility and grant the desired content privileges to the store administrator(s) for the folder, **iStore Directory**.

Following are the OCM privileges:

- Create content, update content, submit for approval (this is one privilege)
- Approve content

- Translation
- Delete (Hard Remove)

The store administrator will be able to view and use approved content items in iStore, regardless of the privileges assigned. However, some functionality may be limited depending on the privileges awarded.

See the *Oracle Content Manager Implementation Guide* for additional details.

23.3.6 Step 6 - Test Oracle iStore-OCM Integration

Bounce the Apache server and log in again to the Store Administration UI.

Following the successful integration of Oracle Content Manager, several UI and functionality changes occur in the Store Administration UI.

It is recommended that you fully test the integration, using the information in [Section 23.4, "Store Administration Behavior with OCM Integration"](#), below, to guide you.

23.4 Store Administration Behavior with OCM Integration

After the successful integration of Oracle iStore and Oracle Content Manager changes occur within the **Content** tab in the Oracle iStore Store Administration UI. And, the concept of source files associated with media objects is replaced by the concept of content items.

This section's topics include:

- [Section 23.4.1, "Existing Store Administration Subtabs and Related Functionality Changes"](#)
- [Section 23.4.2, "Additional Store Administration Subtabs and Related Functionality Changes"](#)

23.4.1 Existing Store Administration Subtabs and Related Functionality Changes

Following is the behavior of the existing Oracle iStore subtabs and related functionality in the Oracle iStore Store Administration application, following the integration with Oracle Content Manager.

1. **Content Repository** subtab --- The Content Repository subtab is removed from the Content tab.

2. **IBE: Use Database for Media Storage** profile option --- Oracle iStore ignores the value of this profile option.
3. **Media Objects subtab** --- The Media Objects subtab remains within the Content tab.

Note: With OCM integration, the terminology "source files" is replaced with "content items." Otherwise, media object functionality is the same with and without OCM integration. See [Section 8.5, "Understanding Media Objects"](#), for more information.

Note: In Release 11.5.9, the **Content Components** subtab within the Content tab moves to the **Advanced** tab in the Oracle iStore Store Administration UI. The content components pages also newly feature the ability to create media objects. See [Section 8.3.2, "Media Objects and Content Components Classes"](#), for more information.

23.4.2 Additional Store Administration Subtabs and Related Functionality Changes

Following is the behavior of the additional Store Administration subtabs and related functionality which appear following the integration with OCM.

Note: With the exception of the **Usage Summary** subtab information, the following provides a high-level view of the additional subtabs and their purposes. For complete information about OCM, refer to the *Oracle Content Manager Implementation Guide* and the *Oracle Content Manager User Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

1. **Usage Summary** subtab --- The **Usage Summary** subtab appears within the **Content** tab. This page is designed to give you summary information about how content items are being used in your stores. This is the only one of the OCM integration subtabs which is owned by the Oracle iStore application. The usage of this subtab is described in [Section 23.5, "Usage Summary Pages"](#).
2. **My Content** --- This subtab contains the content item creation screens. It also allows searching and summary views of content items. This subtab appears only if you are integrating Oracle iStore with OCM.
3. **Library** --- This subtab shows all Approved content.
4. **Pending Approvals** --- This subtab displays content that is awaiting approval.
5. **Translations** --- This subtab allows access to the translations functionality.
6. **Trash** --- This subtab displays content that has been deleted.

23.5 Usage Summary Pages

Within the **Content** tab, the **Usage Summary** subtab shows approved content items that have been associated with media objects. These are the Live versions viewable in the Customer UI (provided that the product, section, and store in which they appear are viewable). The information presented helps you understand how content items are being used in your stores.

Note: Only **approved** versions of a content item can be associated with Oracle iStore media objects.

The **Usage Summary** page does not check whether the product, section, or store using a content item is in Published or Unpublished status, or in the case of stores, within viable dates. When content items have been associated to an Oracle iStore media object, they are considered **Live**.

The Usage Summary pages also allows you to update associations with the latest version of an approved content item, to access details about a content item and its usage, and to see and alter which version of a content item is live in the stores.

Following are the main tasks that can be performed in the **Usage Summary** subtab:

1. Apply the latest approved version of a content item to an Oracle iStore object, if a previous version has been associated to an iStore media object
2. Access content item details
3. Access usage details for a specific content item -- see [Section 23.5.3, "Viewing Usage Details and Changing Live Version"](#)
4. Replace an associated content item with a new one

Other topics in this section include:

- [Section 23.5.1, "Usage Summary: Content Usage by Stores Page"](#)
- [Section 23.5.2, "Applying the Latest Version of a Content Item"](#)
- [Section 23.5.3, "Viewing Usage Details and Changing Live Version"](#)
- [Section 23.5.4, "Replacing Content Items"](#)
- [Section 23.5.5, "Content Items Search Utility"](#)

23.5.1 Usage Summary: Content Usage by Stores Page

Following the successful integration of Oracle Content Manager, when you select the **Content** tab, the **Usage Summary: Content Usage by Stores** page appears. This page summarizes the content items and how they are being used in your stores, through their associations to media objects.

To apply the latest version of a content item, select the **Apply Latest Version** button. See [Section 23.5.2, "Applying the Latest Version of a Content Item"](#).

The summary is presented in the **Results** table, which includes the following columns:

- **Select** -- Use this checkbox to select a content item for update.
- **Content Item** --- This sortable column displays the content item file name. Select the hyperlink of the content item to view OCM's Content Item Details page for the item. See [Section 23.5.3, "Viewing Usage Details and Changing Live Version"](#).
- **Content Type** --- This sortable column displays the content item type. See [Section 23.2.1, "OCM Integration Key Terms and Definitions"](#).
- **Live Version** --- This column displays the version of the content item that is live in a store(s). Note that the *highest* version number is always the *latest* version.

Important: The section or product associated with the content item must also be Published and active in order for the content item to display. See [Section 23.5.3, "Viewing Usage Details and Changing Live Version"](#). See also, [Chapter 7, "Implementing Customer UI Catalog"](#), and [Chapter 8, "Implementing Customer UI Display"](#).

- **Available Date** --- This sortable column shows the first available date of the content item, if one exists. Available date is an optional field for a content item.
- **Expiration Date** --- This sortable column shows the expiration date of the content item, if one exists. Expiration date is an optional field for a content item.
- **Usage** --- The Usage icon allows access to the iStore Usage Summary: Content Item Usage screen. See [Section 23.5.3, "Viewing Usage Details and Changing Live Version"](#).
- **Replace** --- The Replace icon allows access to the iStore Usage Summary: Replace Content Item screen. See [Section 23.5.4, "Replacing Content Items"](#).
- **Latest Version** --- Shows a checkmark if the item is the latest available version. See [Section 23.5.2, "Applying the Latest Version of a Content Item"](#).

23.5.2 Applying the Latest Version of a Content Item

You can use the **Usage Summary** main page to quickly apply the latest version of a content item to an already established association. When the latest version is applied, all associations between the content item and media objects (including media objects mapped to products, sections, content components, and categories, are automatically updated. Use the following procedure.

Steps

1. Navigate to the **Usage Summary** main screen by selecting the **Content** tab, **Usage Summary** subtab. The **Usage Summary: Content Usage by Stores** page appears.

Content items displayed by default in the **Results** table depend upon the value of a profile option. Optionally, perform a search for content items. See [Section 23.5.5, "Content Items Search Utility"](#), for instructions.

2. Select the content item by activating its **Select** checkbox.
3. Select the **Apply Latest Version** button.

The latest version is now applied, and all existing associations are updated.

23.5.3 Viewing Usage Details and Changing Live Version

Select the **Usage** icon in the **Usage Summary: Content Usage by Stores** page **Results** table to retrieve the **Usage Summary: Content Item Usage** page; this page allows you to:

- View all associations for the content item
- Select another version of the content item to make the Live version -- this can be the latest version or an older version
- Navigate to the **Update Media Object** page by selecting the media object in the **Used By** table

The **Usage Summary: Content Item Usage** page shows the following:

- **Content Item** --- Displays the name of the content item being viewed.
- **Content Type** --- Displays the type of the content item.
- **Live Version** --- Use this LOV to select another version to be the Live version. Only live versions of content items are available in the Customer UI. Note that the *highest* version number is always the *latest* version.

- **Available Date** --- Displays the available date of the content item, if applicable.
- **Expiration Date** --- Displays the expiration date of the content item, if applicable.
- **Used By Table** --- The Used By table shows the following:
 - **Focus icon** --- You can use the focus icon to focus on a particular media object association and its sub-items.
 - **Object hyperlinks in Name column** --- Each media object listed in the table is a hyperlink which allows you to drill down to the **Update Media Object** page. In the **Update Media Object** page, you can perform normal content maintenance on the media object. See [Section 8.5, "Understanding Media Objects"](#), for more information.
 - **Type column** --- This column shows the type of the Oracle iStore object in the Name column.
 - **Store column** --- This column lists the stores in which the content item is included.

23.5.4 Replacing Content Items

In the Usage Summary pages, you can replace a content item with another content item, and Oracle iStore automatically updates all existing associations with media objects --- including the mapping between the media objects and content components, categories, products and sections.

Use the **Usage Summary: Replace Content Item** page to replace content items. Use the following procedure.

Steps

1. Navigate to the **Usage Summary** main screen by selecting the **Content** tab. The **Usage Summary: Content Usage by Stores** page appears.

Content items displayed by default in the **Results** table depend upon the value of a profile option. Optionally, perform a search for content items. See [Section 23.5.5, "Content Items Search Utility"](#), for instructions.

2. Select the content item by activating its **Select** checkbox.
3. Select the **Replace** icon for the content item. The **Usage Summary: Replace Content Item** page appears.

The **Replace Content Item** screen has the following two main areas:

- **Current Content Item** --- This area shows the information about the content item, such as name, version, effective dates, and language data. For more information on these fields, see the *Oracle Content Manager User Guide*.
 - **Replace with** --- This area allows you to select another content item to replace the existing one.
4. In the **Replace with** area, select the **flashlight icon** next to the **Content Item Name** textbox.

If desired, you can enter a partial search string in the textbox to limit the items retrieved. There is no need to add a % sign, as Oracle iStore automatically appends this wildcard.

The **Search and Select: Content Items** screen appears.
 5. In the **Search and Select: Content Items** screen, optionally search for content items.

Once the desired content item is displayed in the list, select the content item's **Select** checkbox and press the **Select** button to apply the selection.
 6. When you return to the **Usage Summary: Replace Content Item** screen, the details of the content item will populate the *Replace with* area.

Select **Apply** to save the changes.

The previous content item is now replaced with the new item, and all existing associations are updated.

23.5.5 Content Items Search Utility

Within the **Content** tab, select the **Usage Summary** subtab and then enter search criteria to perform a search of content items.

When accessing the **Usage Summary** screen, both in the Simple and Advanced Search screens, a default search is performed to limit the display of content items. The default results will display all content items that are expiring in x days from the system date. The x days is set in a profile option; see [Section 23.3.3, "Step 3 - Set Profile Options"](#), for details.

23.5.5.1 Steps to Perform a Content Items Simple Search

1. Log in to the Store Administration UI and navigate to **Content > Usage Summary**.
2. In the **Search** area of the **Usage Summary** page, enter search criteria as follows:

- **Search by** --- Use this LOV to select the parameter to search by. Options are: Content Name and Content Type. Use the textbox to the right of the LOV to enter partial values. You may use the % sign as a wildcard if desired.
 - **Expiration Date Range** --- Use the calendar icons to select the date range within which to search; this should be based on the content item's expiration date.
 - **Go** --- Select the Go button to launch the search.
3. After you press **Go**, the search results are returned in the **Results** table.

23.5.5.2 Steps to Perform a Content Items Advanced Search

1. Log in to the Store Administration UI and navigate to **Content > Usage Summary**. Select the **Advanced Search** button.
2. In the **Advanced Search** page, enter search criteria as follows:
 - **Content Item** --- Use this textbox to enter all or partial values for the content item name(s) that you wish to locate. You may use the % sign as a wildcard if desired.
 - **Content Type** --- Use this LOV to select the type of content that you wish to limit the search to. Options are: Media, Image, HTML, and user defined content types.
 - **Available Date Range** --- Use the calendar icons to select the date range within which to search. The search is performed on the available dates of content items.
 - **Expiration Date Range** --- Use the calendar icons to select the date range within which to search. The search is performed on the expiration dates of content items.
 - **Go** --- Select the Go button to launch the search.
3. After you press **Go**, the search results are returned in the **Results** table.

23.6 Concurrent Program to Migrate Data

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, **iStore Oracle Content Manager Integration Migration**.

Important: Please make sure the profile option, **IBC: Use Access Control**, is set to **No** at site level before running the data migration concurrent program.

Both existing and new customers who want to use the OCM integration must run the concurrent program **one time** as a mandatory step to migrate the seed and customer data.

Topics in this section include:

- [Section 23.6.1, "Running the iStore Content Items Migration Concurrent Program"](#)
- [Section 23.6.2, "Understanding the OCM Integration Profile Option"](#)
- [Section 23.6.3, "Concurrent Program Process Flow"](#)
- [Section 23.6.4, "Concurrent Program Parameters"](#)
- [Section 23.6.5, "Migration Logic of Concurrent Program"](#)
- [Section 23.6.6, "File Extensions Used for Attachment Categorization"](#)
- [Section 23.6.7, "Concurrent Program Output"](#)

CAUTION: Back up your system before performing the migration. Once the migration has occurred, you cannot reverse the migration.

23.6.1 Running the iStore Content Items Migration Concurrent Program

The migration script is implemented as a concurrent program that can be run in two modes:

- **Evaluation mode** --- The data is not migrated. Instead the concurrent program provides an output including a summary of the migrated data as well as any exceptions detected before the migration process.
- **Execution mode** --- In this mode, the data migration occurs.

See [Section B.11, "Running Concurrent Programs"](#), for instructions on how to run the concurrent program. Refer to *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

23.6.2 Understanding the OCM Integration Profile Option

When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets the profile option, **IBE: Use Content Management Integration**, to **Yes** at the iStore application level.

Note: The concurrent program will only set the profile to **Yes** when run in execution mode.

Note that you **cannot** use this profile option to turn "off" the integration between Oracle iStore and Oracle Content Manager.

23.6.3 Concurrent Program Process Flow

The user will typically:

1. Run the concurrent program in evaluation mode to check if there is any exception.
2. If there are exceptions, the user can fix the exceptions by making the adequate set up in the Store Administration UI before running the migration script in execution mode.
3. The user then runs the concurrent program in execution mode.

23.6.4 Concurrent Program Parameters

The following table shows the concurrent program parameters:

Table 23–1 OCM Migration Concurrent Program Parameters

Parameter	Field Type	Description
Running Mode (mandatory)	Drop down list	The drop down list contains two values: Evaluation and Execution Default value: Evaluation
Default Language (mandatory)	Drop down list	List Language Name in the drop down list. Default: User session Language.This parameter is used as a default language for ALL (language) and ALL (Store) mappings.

23.6.5 Migration Logic of Concurrent Program

As a pre-requisite, the migration script migrating attachments from the file system to the database has to be run. One has to make sure the migration script has been

run successfully. Only attachments properly migrated in the database will be migrated in Oracle Content Manager.

The concurrent program executes the following steps (these are not exposed to the end user).

1. Categorization of the attachments. This can be done through file extension-OCM content type mapping.

When there is no corresponding OCM content type existing for a file extension, the attachment is migrated to a content item of type "media".

2. Analysis of media object source file mappings.

This step will report all the successful migrated attachments, and will highlight the exceptions -- when more than one source file mapped to different OCM content types needs to be merged under the same content item. The iStore administrator can define a new mapping to fix the exception; otherwise, the new content item will have the type "Media".

For all exceptions in conflict attachment type, the content item type is set to be "Media" no matter if it is seed media object or not.

23.6.6 File Extensions Used for Attachment Categorization

The following table shows the file extensions used to migrate attachments in the right content type:

Table 23–2 File Extensions Used for Attachment Categorization

File Extension	Name of File Format	Content Type
*.jpg, *.jpeg, *.jif, *.jpe	JPEG File Interchange Format	Image
*.png	Portable Network Graphics	Image
*.gif, *.gfa	Graphics Interchange Format	Image
*.html, *.htm	Hypertext Markup Language	HTML
Any other file extension	N/A	Media

23.6.7 Concurrent Program Output

The concurrent program generates an output, either in execution or evaluation mode. The concurrent program output includes:

- A summary of the migrated data
- A list of exception cases happening during the migration process
- A list of content items created and attachments successfully migrated during the migration process, grouped by media object

The table below lists the information presented in the concurrent program output

Table 23–3 Oracle iStore Content Items Migration Concurrent Program Output

Prompt or column heading	Format	Description
Parameters section		
Running mode	text	Either Evaluation or Execution, depending upon the parameter entered by the user.
Default language	text	Default language used as a default base language (Language Description)
SECTION 1 – Migration Summary		
Number of content items created	integer	Number of content items created during the migration process
HTML	integer	Number of content items of type HTML created during the migration process
Image	integer	Number of content items of type image created during the migration process
Media	integer	Number of content items of type media created during the migration process
SECTION 2.1 – Attachments with unknown file extension		
Attachment	240 char max (variable size)	Attachment access name. In the report, attachment names are not truncated and expand on the right (can be a long string since it may include file path as well as the file name).
SECTION 2.2 – Media objects with attachments of different types		
Media Access Name	40 char fixed size	Media access name
Seeded	6 char fixed size	"Yes" for seeded mapping of media objects, "No" for non seeded mapping of media objects

Table 23–3 Oracle iStore Content Items Migration Concurrent Program Output

Prompt or column heading	Format	Description
Store name	40 char fixed size	Store name truncated to the first 40 characters
Language	30 char fixed size	Language description
Attachment	240 char max variable size	Attachment name
SECTION 3 – Migration detailed report		
Media access Name	40 char fixed size	Media access name
Content item code	45 char fixed size	Content item code
Store name	40 char fixed size	Store name truncated to the first 40 characters
Language	30 char fixed size	Language description
Attachment	240 char max variable size	Attachment name

Integrating Oracle iStore with Oracle iSupport Call-Me-Back Functionality

This chapter describes the integration of Oracle iStore 11i with Oracle iSupport.

Main topics in this chapter include:

- [Overview of Oracle iSupport](#)
- [Integration Overview](#)

24.1 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 allows 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

24.2 Integration Overview

By integrating iStore with iSupport, Oracle iStore 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 with Oracle iSupport and Oracle Telephony Manager.

- See *Oracle iSupport Implementation Guide* for details.

24.2.1 Setting up Call Back in Oracle iStore

After setting up Oracle iSupport and Oracle Telephony Manager, set the following profile option at the application level to iStore.

- **IBE: Use Call Me Back** --- Set to **Yes** to activate the callback feature.

The profile option defaults to No if not set.

Integrating Oracle iStore with Oracle Marketing

This chapter describes the integration of Oracle iStore 11i with Oracle Marketing.

This chapter's main topics include:

- [Overview of Oracle Marketing](#)
- [Oracle iStore-Oracle Marketing Integration Overview](#)
- [Oracle Marketing Products Integration Overview](#)
- [Implementing Oracle Marketing Products Integration](#)
- [Products Functionality with Oracle Marketing Integration](#)
- [Using Oracle Marketing to Provide Content in the Customer UI](#)
- [Using Oracle Marketing for Event Capture in the Customer UI](#)

25.1 Overview of Oracle Marketing

An integrated part of the Oracle E-Business Suite, Oracle Marketing is a complete marketing automation application -- it helps companies win and retain profitable customers by enabling marketers to plan, execute, analyze, and optimize overlapping customer-focused programs.

See the *Oracle Marketing Implementation Guide* for more information. This guide is available on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

25.1.1 Implementing Oracle Marketing

Install and set up Oracle Marketing according to the latest *Oracle Marketing Implementation Guide*.

This guide is available on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

25.2 Oracle iStore-Oracle Marketing Integration Overview

Oracle iStore can leverage the following three components of Oracle Marketing functionality:

1. **Product Creation/Management** --- Oracle Marketing's **Products** screens, if integrated, allow you to create and manage products from within the Store Administration application.

See [Section 25.3, "Oracle Marketing Products Integration Overview"](#), for details.

See [Section 6.1, "Products in Oracle iStore Overview"](#), for information about Oracle iStore's product maintenance capabilities.

2. **Marketing Content Postings** --- Oracle Marketing's **eMerchandizing** module allows you to create marketing material that can be displayed on an Oracle iStore Customer UI web page, and to create rules that determine the content for a given posting.

See [Section 25.7, "Using Oracle Marketing to Provide Content in the Customer UI"](#), for details.

3. **Customer Event Capture** --- Oracle Marketing's **Event Capture** functionality allows you to capture and re-use information from customer visits to your specialty stores.

See [Section 25.8, "Using Oracle Marketing for Event Capture in the Customer UI"](#), for details.

25.3 Oracle Marketing Products Integration Overview

Oracle Marketing integration provides enhanced product creation and management capabilities for Oracle iStore in the Store Administration UI, including:

- Product creation
- Product template creation and maintenance

- Product maintenance, including updating Inventory and Order Management product attributes
- Product assignment to Inventory organizations
- Product assignment to Inventory categories
- Price list maintenance, including changing item prices and Units of Measure (UOMs)
- Oracle Bills of Material (BOM) definitions, including specifying item sequence, item, and quantity. Note that only standard bundling is supported.

This chapter discusses these capabilities in general terms. For specific, step-by-step instructions on how to use the Oracle Marketing screens, please refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

See [Section 6.1, "Products in Oracle iStore Overview"](#), for information about Oracle iStore's product maintenance capabilities without the Oracle Marketing integration.

Note: Regardless of whether you are integrating with Oracle Marketing, the product search in Oracle iStore (both Store Administration UI and Customer UI) will **not** retrieve products whose **Web Status** is set to **Disabled**.

25.4 Implementing Oracle Marketing Products Integration

After applying Oracle iStore and its Oracle Marketing prerequisites, the following post-installation steps must be performed to enable the Oracle Marketing integration.

- [Step 1- Set up iStore Administrator as CRM Resource](#)
- [Step 2 - Modify Oracle iStore Menu](#)
- [Step 3 - Set Profile Options](#)
- [Step 4 - Run Load Categories Concurrent Program](#)
- [Step 5 - Recompile the Key Flexfield Segments](#)

25.4.1 Step 1- Set up iStore Administrator as CRM Resource

When integrating with Oracle Marketing Products screens, the iStore administrator must be a CRM Resource.

Prerequisites

- The iStore administrator has been set up. See [Section 4.1.2.1, "Set up iStore Administrator \(Manager\)"](#), for steps.
- The Resources module of the Oracle CRM Application Foundation is a prerequisite to setting up a user as a Resource. Implement Oracle CRM Application Foundation Resources module according to the most recent *Oracle CRM Application Foundation Implementation Guide*.

25.4.1.1 Create an Employee

You may use the following steps to create an employee:

1. Log in to Oracle Forms with **Human Resources** responsibility.
2. Navigate to **People > Enter and Maintain**. Create an employee.

See *Using Oracle HRMS - The Fundamentals* for more information on setting up employee users.

25.4.1.2 Associate Employee to iStore Administrator User

Associate the newly created employee to the user who is the iStore administrator:

1. Log in to Oracle Forms with **System Administrator** responsibility.
2. Navigate to **Security > User > Define**.
3. Assign the employee created in the step above to the user who is the iStore administrator.

See the *Oracle Application's System Administrator's Guide* for more information.

25.4.1.3 Import Employee as Resource

Import the newly created employee as a CRM Resource. Import the employee only after the association with the user has been made.

1. Log in to Oracle Forms with **CRM Resource Manager** responsibility.
2. Navigate to **Maintain Resource > Import Resources**.
3. Search for the employee created above and select **Create Resource**.

See the *Oracle CRM Application Foundation Implementation Guide* for more information.

25.4.2 Step 2 - Modify Oracle iStore Menu

In order for the Oracle Marketing menus to appear in the Store Administration UI, you must replace some of the default Store Administration UI menus with Oracle Marketing Products menus.

Important: Avoid using the seeded SYSADMIN user to log into Oracle Forms and make the menu prompt changes. Use another user to login and make the changes.

Note: Since you will be modifying only the submenus underneath the iStore Root menu assigned to the iStore Administrator, the submenus will be automatically associated to the iStore Administrator responsibility.

1. Log in to Oracle Forms as a user other than SYSADMIN, using **Application Developer** responsibility.
2. Navigate to **Application > Menu**. The **Menus** window opens. Use the Menus functionality to do the following:
3. Within the **iStore Catalog tab** menu (**IBE_M_CATALOG**):
 - a. Remove the **Products** prompt from submenu **iStore Products sub tab** (**IBE_M_CATALOG_PRODUCTS**).
 - b. Set the **Products** prompt to submenu **iStore and Marketing Products sub tab** (**IBE_M_CATALOG_PRODUCTS_AMS**).
 - c. Save the changes.
4. Within the **iStore Merchant root menu** (**IBE_M_MENU_ROOT**):
 - a. Remove the **Advanced** prompt from submenu **iStore Advanced tab** (**IBE_M_ADVANCED**).
 - b. Set the **Advanced** prompt to submenu **iStore and Marketing Advanced tab** (**IBE_M_ADVANCED_AMS**).
 - c. Save the changes.
5. Remember to bounce the Apache server after making these changes.

For complete instructions on how to modify menus and functions, see the *Oracle System Administrator's Guide*.

25.4.3 Step 3 - Set Profile Options

The following profile options should be set or verified:

- [AMS: Item Validation Organization](#) and [IBE: Item Validation Organization](#)

- [IBE: Use Advanced Product Setup](#)
- [AMS: Inventory Item Update Allowed](#)
- [OSO: Debug Messages On](#)

25.4.3.1 AMS: Item Validation Organization and IBE: Item Validation Organization

Set the **AMS: Item Validation Organization** and **IBE: Item Validation Organization** profile options at **site** and **application** levels to the Master Inventory Organization.

For more information about how iStore uses the **IBE: Item Validation Organization** profile option to derive its product database, see [Section 6.3.1, "Products Retrieved From a Single Inventory Organization"](#).

Please refer to the *Oracle Marketing Implementation Guide* for more information on how Oracle Marketing uses this profile option.

Important: Item Validation Profile Options and the Create Product Button

When integrating with Oracle Marketing's Products screens, if the two item validation organization profile options do not match **at the same levels**, then the **Create Product** button will **not** display in the Store Administration UI's Catalog > Products menu. However, the iStore administrator still will have view and update privileges for products *within the inventory organization* of the **IBE: Item Validation Organization** profile option at its *lowest-level* setting.

For example, if you set the **IBE: Item Validation Organization** profile option at the iStore administrator **responsibility** level, then the **Create Product** button will be disabled, since it is not possible using out-of-the-box functionality to set the **AMS: Item Validation Organization** profile option at responsibility level. However, the iStore administrator still will be able to view and update products within the inventory organization specified in the IBE profile option at the responsibility level.

The **Create Product** button displays under the following conditions:

1. The Oracle Marketing menu changes have been implemented. Refer to [Section 25.4.2, "Step 2 - Modify Oracle iStore Menu"](#).
2. The profile options, **IBE: Item Validation Organization** and **AMS: Item Validation Organization** match **at the same levels**.
3. The profile option, **IBE: Use Advanced Product Setup** is set to **Yes**.

25.4.3.2 IBE: Use Advanced Product Setup

The profile option, **IBE: Use Advanced Product Setup**, controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Store Administration UI. To invoke Oracle Marketing's Product pages, set this profile option to **Yes** at the iStore application level. If set to **No**, then Oracle iStore's Product Detail pages will be retrieved. This profile is updateable at all levels.

Note that this profile option only controls the **Product Detail** pages used during product *update* operations.

25.4.3.3 AMS: Inventory Item Update Allowed

Set the Oracle Marketing profile option, **AMS: Inventory Item Update Allowed**, to **Yes** to allow items created in Oracle Inventory to be updated.

Please refer to the *Oracle Marketing Implementation Guide* for more information on how Oracle Marketing uses this profile option.

25.4.3.4 OSO: Debug Messages On

Ensure that the profile option, **OSO: Debug Messages On**, is set to **No** at the iStore application level. If set to Yes, messages will appear in the Oracle Marketing-Oracle iStore product integration pages.

For instructions on how to set profile options, see [Section A.2, "How to Set Profile Options"](#). For more information on the Oracle Marketing profile options (AMS) and the Oracle Sales profile options (OSO), please see the respective product implementation documentation.

25.4.4 Step 4 - Run Load Categories Concurrent Program

Run the concurrent program to load the Oracle Inventory categories information into the Oracle Marketing database tables. The concurrent program is **AMS Load Inventory Categories**. This allows the appearance of current product categories data in the Store Administration-Oracle Marketing pages.

Note that you only need to run the concurrent program **after you create new categories** in Oracle Inventory.

Following are high-level steps:

1. Log in to Oracle Forms with **Marketing Manager** responsibility.
2. Run the concurrent program, **AMS Load Inventory Categories**.

For more information, see the *Oracle Marketing Implementation Guide*.

For generic instructions on how to run concurrent programs, see [Section B.11, "Running Concurrent Programs"](#).

25.4.5 Step 5 - Recompile the Key Flexfield Segments

In Oracle Applications, key flexfields (KFFs) are customized fields used to enter multi-segment values such as part numbers, account numbers, etc.

You must recompile the key flexfield segments -- only once -- after creating them. If you do not perform this step, part numbers will appear as XXXX in the Products pages.

Following are quick steps to recompile the KFF segments. For more information, see the *Oracle Inventory User's Guide*.

1. Log in to Oracle Forms with **System Administrator** responsibility.
2. Navigate to **Application > Flexfield > Key > Segments**.
3. Query on:
 - **Application** --- Oracle Inventory
 - **Flex Title** --- System Items (MTL_SYSTEM_ITEMS_B_KFV)
4. Recompile the key flexfield by selecting the **Compile** button.

For more information on DFFs in iStore, see [Section 6.7, "Using Descriptive Flexfields for Products"](#). For general information on DFFs, see the *Oracle Application's User's Guide*.

25.5 Products Functionality with Oracle Marketing Integration

Following the successful integration of Oracle iStore and the Oracle Marketing Products module, the **Store Administration** application will reflect the following:

- [Catalog Tab Changes](#)
- [Advanced Tab Changes](#)

25.5.1 Catalog Tab Changes

In the **Catalog** tab of the Store Administration UI --- under the **Products** subtab's **Planning** menu (accessible by updating a product) --- the following functionality is available:

- **Create and Maintain Products** --- See [Section 25.6, "Product Creation and Maintenance Overview"](#).
- **Define Product Options/Attributes** --- See [Section 25.6.2.2, "Selecting Product Options/Attributes"](#).
- **Assign Products to Categories** --- See [Section 25.6.2.1, "Assigning Products to Categories"](#).
- **Assign Products to Inventory Organizations** --- See [Section 25.6.2.3, "Assigning Products to Organizations"](#).
- **Assign Prices to Products** --- See [Section 25.6.2.4, "Assigning Products to Price Lists"](#).
- **Create and Maintain Model Bundles** --- See [Section 25.6.2.5, "Maintaining Model Bundles"](#).

25.5.2 Advanced Tab Changes

In the **Advanced** tab of the Store Administration UI, the **Product Templates** subtab is available following successful integration. Use this subtab to create new product templates and maintain existing ones. The templates determine the Oracle Inventory options or attributes that are available during product creation.

See [Section 25.6.3, "Creating New Product Templates"](#).

25.6 Product Creation and Maintenance Overview

Integration of Oracle Marketing's Product screens allows iStore administrators to define new products and update existing product details from the following Store Administration UI menu paths:

- **Catalog > Products (update product)**
- **Advanced > Product Templates**

Products created in the Store Administration UI are immediately stored in the same database tables as products created in Oracle Inventory using Oracle Forms.

For information about the default inventory organization for product creation, see [Section 25.6.1.2, "Organization Where Product is Created"](#). Refer to [Section 25.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option setting recommendations.

Two types of products can be created:

- **Inventory items** --- These include tangible items such as books, clothing, appliances, and computers.
- **Service items** --- Currently, only **warranties** are supported as a newly created product through the Store Administration application.

Oracle iStore provides a default **inventory** template and a default **service** template. These can be viewed and their attributes managed in the **Advanced > Product Templates** menu in the Store Administration UI.

Templates have the following rules:

- Each template must link to an iStore administrator responsibility. By default, the two seeded product templates (one for service, one for inventory) are linked to the seeded iStore administrator responsibility.
- Only one responsibility can map to one template (of type inventory or service). You cannot map more than one responsibility to a single template.

See [Section 25.6.3, "Creating New Product Templates"](#), for more information on creating and working with the product templates.

This section's main topics include:

- [Section 25.6.1, "Product Creation"](#)
- [Section 25.6.2, "Product Maintenance"](#)
- [Section 25.6.3, "Creating New Product Templates"](#)
- [Section 25.6.4, "Product Attributes in Seeded Product Templates"](#)

25.6.1 Product Creation

This section contains general information about product creation using the Oracle iStore-Oracle Marketing product screens integration. For complete steps to create and maintain products using the Oracle Marketing product screens, refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

25.6.1.1 Create Product Process Flow

Following is the process flow for creating products using Oracle Marketing Products screens in the Oracle iStore Store Administration UI.

1. The iStore administrator logs into the Store Administration UI and navigates to the **Catalog > Products** pages.

2. Administrator selects the **Create Product** button in the **Products** summary screen.

If this button does not appear, see [Section 25.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option recommended settings.

3. In the **Create Product** screen, the administrator selects either the **Product** or the **Service** radio button, depending upon the type of product being created.

Each product type --- Inventory or Service --- has its own seeded template which determines the available attributes or options. Template attributes can be modified in the **Advanced > Product Templates** screen. See [Section 25.6.3, "Creating New Product Templates"](#), for details.

Information on seeded templates attributes can be found in [Section 25.6.4, "Product Attributes in Seeded Product Templates"](#).

4. In the **Create Product** screen, the iStore administrator defines the following:

- **Product Name** --- User enters product name. This is a mandatory field.
- **Product Number** --- Users can input the Product Number without entering the key flexfield page, as long as they use the correct separator, and the combination of the segment values is unique and valid.

The page is refreshed when users move to the next field. At this point, an Inventory API validates the product number combination.

- **Key Flexfields** --- For information on using the **key flexfield icon** (located to the right of the Product Number textbox), see [Section 25.6.1.4, "Product Number and Key Flexfields"](#), below. This is a mandatory field.
- **Owner** --- The user can update this field by selecting the flashlight icon. The owner must be a CRM Resource. This field is automatically populated based on the resource associated to the iStore administrator user. See [Section 25.4.1, "Step 1- Set up iStore Administrator as CRM Resource"](#), for more details.
- **Product Type** --- User selects the product type, if desired. This is an optional field. In Oracle Inventory, the Product Type field can be used to further categorize products.
- **Description** --- User enters optional description.
- **Unit of Measure (UOM)** --- UOM is defaulted in Inventory based on the **INV: Default UOM** profile option.

Users can select the **flashlight icon** to search for and retrieve other UOMs for the inventory organization listed in the Create Product page.

See [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for information about how these fields relate to Oracle Inventory fields/database columns.

5. The administrator selects **Apply** from the **Create Product** screen to save the newly created product, and then the **Product Detail** screen appears.

Note that the administrator can select the **Clear** button to cancel the product creation, before submitting the changes.

6. After the product is created, the store administrator can update the product through the **Catalog > Products** screens in the Store Administration UI.

See [Section 25.6.2, "Product Maintenance"](#), for more information.

Update operations include the ability to access previously defined descriptive flexfields. See [Section 25.6.1.5, "System Item Descriptive Flexfields \(DFFs\)"](#), below, for more information.

25.6.1.2 Organization Where Product is Created

When you create a product using the Store Administration UI, it is automatically assigned to the inventory organization defined in the profile options, **IBE: Item Validation Organization** and **AMS: Item Validation Organization**. See [Section 25.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option setting recommendations.

You must then assign the product to the appropriate sub-organization, if desired. This task can be performed either in the Store Administration UI or in Oracle Forms using Inventory responsibility. See [Section 25.6.2.3, "Assigning Products to Organizations"](#), for more information on assigning products using the Store Administration application.

25.6.1.3 Templates Link to iStore Administrator Responsibility

Out-of-the-box, the Inventory and Service templates available with the Oracle Marketing Products integration are both tied to the iStore administrator responsibility. When the store administrator selects the **Product** or **Service** radio button in the **Create Product** page, the template assigned to the user's responsibility is automatically applied when the product is saved, and controls the Inventory attributes available.

25.6.1.4 Product Number and Key Flexfields

The Key Flexfield (KFF) icon is displayed beside the **Product Number** field.

Users press the icon, and the **Select Product Number Segments** page displays, with textboxes to enter the Product Number Segments defined in the key flexfield setup in Oracle Inventory. In this page, the user must enter the segments defined in the KFF.

The figure below shows an example of the Select Product Number Segments page.

Figure 25–1 Select Product Number Segments Page

Product Number Segment	Value	Description
*Item		
Product Line		

* Indicates a required field.

The values shown in the **Product Number Segment** textboxes depend on the KFF setup in Inventory. For example, if you have set up your KFF to be a list of values (LOV), then the KFF for the Product Number Segments textbox will be an LOV.

For more information on KFFs, see the *Oracle Inventory User Guide*.

To continue with the product creation, the user enters the mandatory information in the textbox(es) and selects the **Update** button.

25.6.1.5 System Item Descriptive Flexfields (DFFs)

In Oracle Applications, system item descriptive flexfields (DFFs) are customized fields for entering additional information for which your Oracle Applications product has not already provided a field. For more information, see the *Oracle Applications User's Guide*.

If a DFF has been set up through Oracle Inventory, the additional attributes are displayed in the **Product Detail** page, where the user can complete the product definition with required and optional attributes.

Due to Oracle Marketing framework limitations, DFFs are displayed only in the **Product Detail** page -- not in the **Create Product** page -- thus, the store administrator must first create the product before accessing the DFFs.

In the **Product Detail** page, the following display options can be rendered using DFFs:

- Drop-down menus with predefined lists of values
- Text input fields with no format condition and no defaults
- Text input fields with no format condition and default values
- Text input fields with format conditions
- Text input field with search icon for LOVs that have more than 50 values
- Date fields
- Drop-down menus with values that depend on previous selection

Label definitions and LOV validations must be rendered according to the DFF setup in Inventory. If the DFF is not enabled, the DFF is not displayed in the page.

The figure below shows an example of the **Product Detail** page with DFFs displaying below the **Description** field.

Figure 25–2 Product Detail Page with DFFs Example

Summary

Planning

- Product Details
- Catalogues
- Inventory Options
- Organization
- Assignments
- Price List
- Bundling

Sections

- Stores
- Content
- Display Template
- Relationships
- DetailsTest

Product Detail

Required product information is displayed below. You can change editable fields and click the Apply button.

***Product Name** **Status**

Product Number : AS18947.

Inventory Organization : Vision Operations

Product Type **UOM** : Each

Creation Date : 07/APR/1997

Description

LDP

Invoice UOM

Charge Code

Serial Number

* indicates required field

For more information, see the *Oracle Applications User's Guide*.

25.6.2 Product Maintenance

This section contains general information about product maintenance using the Oracle iStore-Oracle Marketing product screens integration. For complete information on maintaining products using the Oracle Marketing product screens, refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

Following is the process flow for updating products using Oracle Marketing product screens in the Store Administration UI.

1. The iStore administrator selects a product from the **Products** summary page, and then selects the **Update** button.
2. In the **Product Detail** page, the administrator can update or view the following information about the product:
 - **Product Name** --- The user can update this field by entering new information into the textbox.
 - **Product Number** --- This field is read-only during update.
 - **Owner** --- The user can update this field by selecting the flashlight icon. The owner must be a CRM Resource. This field is automatically populated based on the resource associated to the iStore administrator user. See

[Section 25.4.1, "Step 1- Set up iStore Administrator as CRM Resource"](#), for more details.

Note: Products that existed in iStore before the integration with Oracle Marketing's product screens will **not** display this field.

- **Status** --- The user can select this LOV to update product status.
- **Inventory Organization** --- This field is read-only and indicates the inventory organization defined in the profile option, IBE: Item Validation Organization (at its lowest level).
- **Unit of Measure (UOM)** --- This field is read-only.
- **Product Type** --- The user can update this field by selecting from the LOV.
- **Creation Date** --- This field is read-only, and shows the creation date of the product in Inventory.
- **Description** --- The user can update this field by entering new information into the textbox.

See [Section 6.3.3, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for information about how these fields relate to Oracle Inventory fields/database columns.

The figure below shows an example of the **Product Detail** page.

Figure 25–3 Product Detail Page

Product Detail

Required product information is displayed below. You can change editable fields and click the Apply button. Preview Revert Apply

*Product Name

Product Number : AS66311. **Status**

Inventory Organization : Vision Operations

Product Type **UOM :** Each

Creation Date : 14/FEB/2000

Description

25.6.2.1 Assigning Products to Categories

iStore administrators use the **Product Detail: Category Assignment** page to assign products to Inventory categories within the default category set. For more information about how the default category set for Oracle iStore is determined, see [Section 6.3.2, "Inventory Categories and the iStore Product Catalog"](#).

To retrieve the **Category Assignment** page, select a product from the **Products** summary page and then select the **Update** button. From the **Planning** menu, select the **Categories** link.

Note: In the **Category Assignment** page, you must first remove a category and then add the replacement category in order to change the category assignment for a product.

The figure below shows an example of the **Category Assignment** page.

Figure 25–4 Product Detail: Category Assignment Page

Product Detail - Category Assignment

To view the item in Oracle Sales Online, assign a category from Sales and Marketing category set.

Preview

Revert

Apply

Inventory Organization: Vision Operations

Product Number: AS66311.

Product Name: [Vision Pad DX - Mobile Computer](#)

Remove	Category Set	Description	Category
☐	Purchasing		MISC.MISC
☐	Inv.Items	Miscellaneous.Miscellaneous	MISC.MISC
	Inventory		
	Inventory		
	Inventory		

25.6.2.2 Selecting Product Options/Attributes

When the iStore administrator initially creates a product in the Store Administration pages, the appropriate template is automatically applied. The options (attributes), however, can be changed through the **Product Detail: Inventory Options** page.

To retrieve this page, select a product from the **Products** summary page and then select the **Update** button. From the **Planning** menu, select the **Inventory Options** link.

See [Section 25.6.4, "Product Attributes in Seeded Product Templates"](#), for the list of attributes defined by default in each seeded template.

The figure below shows an example of the **Inventory Options** page.

Figure 25–5 Product Detail: Inventory Options Page

Product Detail - Inventory Options

Displays those inventory attributes that are associated to the product. To edit, select the check box(es) and click Apply.

Preview

Revert

Apply

Inventory Organization: Vision Operations

Product Number: AS66311.

Product Name: Vision Pad DX - Mobile Computer

Inventory

☒ Inventory Item

Indicate whether to stock and transact this item in Inventory.

☒ Stockable

Indicate whether to stock this item in inventory.

☐ Transactable

Indicate whether to allow inventory transaction.

☐ Revision Control

Indicate whether to track inventory balance by revisions.

Bill of Material

Bom Item Type

Standard

Indicates the bom type of an item.

☒ BOM Allowed

Indicate whether to allow creating a Bill Of Material for item.

☐ Pick Components

Indicates whether all shippable components should be picked.

Costing

☒ Cost Enabled

Indicate whether to track costs for this item in inventory.

Physical Attributes

☐ Collateral Item

Indicate whether the item is a marketing collateral.

☐ OM Indivisible

Indicate whether this product can be ordered in fractions.

Product Weight

Pounds

 This attribute permits the system to accurately calculate the shipping costs at time of order capture by cross-referencing with carrier rate tables.

Unit Weight

Indicates the system to accurately calculate the shipping costs based on the unit weight.

Order Management

☒ Customer Orderable

Indicate whether to allow an item to be ordered by external customers.

☒ Customer Order Enabled

Indicate whether an item is currently customer orderable. If you turn this attribute on, you can specify the item on an external order, if Customer Orderable is also on.

25.6.2.3 Assigning Products to Organizations

When the iStore administrator initially creates a product in the Store Administration UI, it is placed into the inventory organization defined in the profile option, **IBE: Item Validation Organization**. See [Section 25.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option setting recommendations.

If you want the product to be available to sub-organizations under this inventory organization, you can move it to the appropriate inventory organization, using the **Product Detail: Organization Assignments** page.

To retrieve the **Product Detail: Organizations** page, select a product from the **Products** summary page and then select the **Update** button. From the **Planning** menu, select the **Organization Assignments** link.

The figure below shows an example of the **Organization Assignments** page.

Figure 25–6 Product Detail: Organization Assignments Page

Product Detail - Organization Assignments

Displays all inventory organizations. To assign the product to any organization select organization and UOM.

Inventory Organization: Vision Operations
Product Number: AS66311.
Product Name: [Vision Pad DX - Mobile Computer](#)

[Preview](#) [Revert](#) [Apply](#)

Organization	Unit of Measurement
Seattle Manufacturing	Each
Miami Distribution Center	Each

Note that you also can select UOMs in this page.

25.6.2.4 Assigning Products to Price Lists

When the iStore administrator initially creates a product in the Store Administration UI, it is not included in any price list. Therefore, you may wish to place it on a price list using the **Product Detail: Price Lists** page.

To retrieve this page, select a product from the **Products** summary page and then select the **Update** button. From the **Planning** menu, select the **Price List** link.

In the **Price Lists** page, you can assign a product to a previously created price list assigned to the appropriate inventory organization. See [Section 25.6.1, "Product Creation"](#), and [Section 25.6.2.3, "Assigning Products to Organizations"](#), for more information.

The **Price Lists** page includes the following fields or columns:

- **Name** --- This column shows the price list name. To select a price list, the administrator can select the flashlight icon to retrieve an LOV of price lists from within the inventory organization specified at the top of the screen.
- **Currency** --- This column shows the default currency for the price list.
- **Price** --- This textbox allows the user to enter a price for the product into the price list. Use the format recommended in the *Oracle Order Management Suite Implementation Manual*, Pricing chapter.
- **UOM** --- The user can set the unit of measure by selecting the flashlight icon.
- **Static Formula** --- The user can select a static formula by selecting the flashlight icon.
- **Dynamic Formula** --- The user can select a dynamic formula by selecting the flashlight icon.
- **Effective Dates** --- Using the calendar icons in the Start Date and End Date columns, the user can enter the effective dates that the product will be available on the price list.

More information on pricing can be found in [Chapter 9, "Implementing Pricing"](#), and the *Oracle Order Management Suite Implementation Manual*, Pricing chapter.

The figure below shows an example of the **Price Lists** page.

Figure 25–7 Product Detail: Price Lists Page

Product Detail - Price Lists

Inventory Organization: Vision Operations

Product Number: AS66311.

Product Name: Vision Pad DX - Mobile Computer

Use this screen to add the product to existing price lists.

Preview

Revert

Apply

*Name	Status	Currency	*Price	*UOM	Static Formula	Dynamic Formula	Start Date	End Date
<u>corporate</u>		US dollar		Each			01/JAN/	
<u>corporate</u>		US dollar	249.00	Each			01/JAN/	
<u>KG Price List 1</u>		US dollar	249.00	Each				
<u>corporate</u>		US dollar		Each			01/JAN/	

PreviousNext

Preview

Revert

Apply

25.6.2.5 Maintaining Model Bundles

Using the **Product Detail: Bundling** page, users can create and maintain model bundles (requiring Oracle Bills of Material integration) defining the following:

- Item sequence
- Item
- Quantity

Note: In the Oracle iStore Customer UI, only standard model bundles with mandatory option classes are supported. For more information, see [Chapter 21, "Integrating Oracle iStore with Oracle Bills of Material"](#).

To retrieve this page, select a product from the product summary page and then select the **Update** button. From the Planning menu, select the **Bundling** link.

The figure below shows an example of the **Bundling** page.

Figure 25–8 Product Detail: Bundling Page

Product Detail - Bundling

Specify which products this product bundle will contain. This information will be stored in Bill Of Material. The BOM allowed flag for this product bundle should be set to 'Y'.

Preview

Revert

Apply

Inventory Organization: Vision Operations

Product Number: AS66311.

Product Name: Vision Pad DX - Mobile Computer

Remove	Item Sequence	Product Name	Product Number	Unit of Measurement	Quantity
☐	1	vxuitem2	vxu002.	Each	2

For more information on creating bills of material, see the *Oracle Bills of Material Implementation Guide*.

25.6.3 Creating New Product Templates

The store administrator can use the **Product Templates** subtab in the Store Administration UI’s **Advanced** tab to create custom product templates. Each template links to a responsibility, and for each responsibility you may create only one Product and one Service template.

To create and enable a new template, do the following:

- [Create a New Responsibility for the iStore Administrator](#)
- [Link the Responsibility to the iStore-Marketing Menus](#)
- [Create a New Product or Service Template](#)
- [Set up the New Template](#)

25.6.3.1 Create a New Responsibility for the iStore Administrator

In Oracle Forms, create a new responsibility, or copy the seeded iStore Administrator responsibility.

See the *Oracle Application’s System Administrator’s Guide* for information on creating new responsibilities.

25.6.3.2 Link the Responsibility to the iStore-Marketing Menus

Link the new responsibility to the menu, using the following steps

1. Log in to Oracle Forms with **System Administrator** responsibility.
2. Navigate to **Security > Responsibility > Define**.
3. Query for the new responsibility.
4. Associate the **iStore Merchant Root** menu with the new responsibility.

25.6.3.3 Create a New Product or Service Template

Create a new template, using the following procedure:

1. Log in to the Store Administration UI and navigate to **Advanced > Product Templates**. The **Product Templates** page displays.
2. Select the **Create Product Template** button.
3. In the **Create Product Template** screen, enter the following:
 - **Template Name** --- Enter a unique, descriptive name for the template.
 - **Type of template** --- Select the radio button for either a **Product** or **Service** template.
 - **Description** --- Optionally, enter a description for the template in the **Description** field.
4. Select **Apply** to save the changes. A confirmation message is displayed.

25.6.3.4 Set up the New Template

Set up the new template, as follows:

1. Log in to the Store Administration UI and navigate to **Advanced > Product Templates**. The **Product Templates** page displays.
2. Select the hyperlink of the new template in the **Product Templates** screen.
3. In the **Responsibilities** block, select the flashlight icon to retrieve the iStore responsibility which will link to the template. Only one product template and one service template can be assigned to a responsibility.

Optionally, remove an assignment.
4. In the **Attributes** block, set the following parameters for each attribute.
 - **Default** --- Select this to make an attribute part of the template by default.

- **Editable** --- Select this to make an attribute updateable in the product screens. This field overrides the Hide field. If you select Editable, Hide is ignored.
- **Hide** --- Select this to make the attribute hidden in the product screens. This is overridden by a selected Editable parameter.

See [Section 25.6.4, "Product Attributes in Seeded Product Templates"](#), for the list of attributes defined by default in each seeded template.

See the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide* for more information on product templates.

25.6.4 Product Attributes in Seeded Product Templates

Different Inventory attributes can be assigned to a product, depending upon the type of product created -- Inventory or Service. If an Inventory product has been created, the attributes screen will display the specific Inventory and Order Management attributes; if the Service option has been selected, the specific Service default attributes will be displayed. The tables in this section list the seeded attributes for each of the two seeded iStore product templates:

- **Product (Inventory) Template** --- See [Section 25.6.4.1, "Oracle iStore Product Template Attributes"](#).
- **Service Template** --- See [Section 25.6.4.2, "Oracle iStore Service Template Attributes"](#).

25.6.4.1 Oracle iStore Product Template Attributes

The following table, Oracle iStore Product Template Attributes, shows the attributes for the seeded Product template.

Table 25–1 Oracle iStore Product Template Attributes

Attributes	Default	Editable	Hide
Inventory Attributes			
Inventory Item	Yes	Yes	No
Stockable	Yes	Yes	No
Transactable	Yes	Yes	No
Revision Control	Yes	Yes	No
Bill of Material Attributes			

Table 25–1 Oracle iStore Product Template Attributes (Cont.)

Attributes	Default	Editable	Hide
BOM Allowed	No	Yes	No
BOM Item Type	Standard	Yes	No
Pick Components	No	Yes	No
Costing Attributes			
Cost Enabled	Yes	Yes	No
Physical Attributes			
Collateral Item	No	No	No
Electronic Format	No	No	Yes
Downloadable	No	No	Yes
OM Indivisible	Yes	Yes	No
Unit Weight	Null	Yes	No
Weight UOM	Null	Yes	No
Order Management Attributes			
Customer Orderable	Yes	Yes	No
Customer Order Enabled	Yes	Yes	No
Internal Orderable	Yes	Yes	No
Shippable	Yes	Yes	No
Returnable	Yes	Yes	No
Activation Required	No	No	Yes
Assemble to Order	No	Yes	No
Invoicing Attributes			
Invoiceable	Yes	Yes	No
Invoice Enabled	Yes	Yes	No
Service Attributes			
Serviceable	No	Yes	No
Defect Tracking	No	Yes	No
Install Base	No	Yes	No

Table 25–1 Oracle iStore Product Template Attributes (Cont.)

Attributes	Default	Editable	Hide
Subscription Dependency Enabled	No	No	Yes
Billing Type	Null	Yes	No

See the *Oracle Inventory User's Guide* for more information on the meaning of these attributes.

25.6.4.2 Oracle iStore Service Template Attributes

The following table, Oracle iStore Service Template Attributes, shows the attributes which are included in the seeded Service template.

Table 25–2 Oracle iStore Service Template Attributes

Attributes	Default	Editable	Hide
Costing Attributes			
Cost Enabled	Yes	Yes	
Physical Attributes			
Collateral Item	No	No	Yes
Electronic Format	No	No	Yes
Downloadable	No	No	Yes
OM Indivisible	No	No	No
Unit Weight	No	No	Yes
Weight UOM	No	No	Yes
Order Management Attributes			
Customer Orderable	Yes	Yes	No
Customer Order Enabled	Yes	Yes	No
Internal Orderable	Yes	Yes	No
Activation Required	No	No	Yes
Assemble to Order	No	Yes	No
Invoicing Attributes			
Invoiceable	Yes	Yes	No

Table 25–2 Oracle iStore Service Template Attributes (Cont.)

Attributes	Default	Editable	Hide
Invoice Enabled	Yes	Yes	No
Service Attributes			
Defect Tracking	No	Yes	No
Support Service	Null	Yes	No
Coverage Template	Null	Yes	No
Duration Value	No	Yes	No
Duration Period	No	Yes	No
Web Attributes			
Orderable on the Web	Yes	No	No
Web Status	Yes	Yes	No

See the *Oracle Inventory User's Guide* for more information on the meaning of these attributes.

25.7 Using Oracle Marketing to Provide Content in the Customer UI

The content you define in Oracle Marketing can be displayed in seeded bins in the Customer UI, through the use of Oracle iStore's Display Template functionality.

The out-of-the-box Display Templates that are candidates for marketing postings include:

- Section page bins
- Item page bins
- Shopping cart page bins

Each of these pages has seven left bins, seven right bins, one top bin, and one bottom bin. Each bin is listed as a separate logical Display Template in the Oracle iStore template manager.

See [Section 25.7.1, "High-Level Steps for Creating and Posting Content with Oracle Marketing"](#), below, for steps.

25.7.1 High-Level Steps for Creating and Posting Content with Oracle Marketing

Following is a high-level flow for creating and posting materials from Oracle Marketing in Oracle iStore's Customer UI catalog and shopping cart pages.

Note: These steps assume you have created at least one store and made it available in the Customer UI.

1. Set the profile option, **IBE: Use Web Placements**, to **Yes** to enable eMerchandising postings in the specialty stores. Set this at the application level to iStore.
2. **Create Content** --- Creating eMerchandising postings in Oracle Marketing. See the *Oracle Marketing Implementation Guide* for information about setting up Oracle Marketing.
3. **Identify Display Templates** --- Determine which Display Templates will display the content. See [Appendix E, "Display Templates and Media Objects"](#), for a complete list of Display Templates.
4. **Map Display Template to Content** --- Associate the Display Template with the desired content (a JSP file), using the Display Template functionality. See [Section 8.2.4, "Mapping Source Files to Display Templates"](#), for steps.
5. **View Posting** --- When a user views your specialty store online, the Oracle iStore template that references the posting 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. The Oracle iStore template also passes its bin location. Oracle Marketing's eMerchandising module creates a specialty store posting for the corresponding placement.

See [Chapter 8, "Implementing Customer UI Display"](#), for more information about how the Customer UI pages are displayed.

See [Appendix E, "Display Templates and Media Objects"](#), for a complete list of Display Templates.

25.8 Using Oracle Marketing for Event Capture in the Customer UI

Integration with Oracle Marketing can allow Oracle iStore to capture the following important events during users' visits to your specialty 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 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's eMerchandising module uses this information to enhance personalization of the customer experience.

25.8.0.1 Enabling Customer Event Capture

No extra setups are required in Oracle iStore in order for Oracle Marketing to provide event capture.

Integrating Oracle iStore with Oracle Quoting

This chapter describes the integration of Oracle iStore 11i with Oracle Quoting.

Main topics in this chapter include:

- [Overview of Oracle Quoting](#)
- [Oracle iStore Functionality with Oracle Quoting](#)

26.1 Overview of Oracle Quoting

Oracle Quoting enables simple, secure creation and management of customer quotes across all sales and interaction channels. Organizations can propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle.

Users can create quotes using modifiable templates, add and configure complex products, and perform real-time global availability checks. Users can accept product trade-ins, assign sales credits, and manually adjust prices. Quoting integration with Oracle Sales Contracts allows users to negotiate a quote with a sales contract.

Oracle Quoting is available with an HTML and a Forms user interface. Oracle Quoting-HTML is integrated with Oracle Sales Online and Oracle Quoting-Forms with Oracle TeleSales.

26.1.1 Setting up Oracle Quoting

Set up Oracle Quoting according to the latest version of the *Oracle Quoting Implementation Guide* available on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Note: Oracle iStore uses Oracle Order Capture APIs to integrate with Oracle Order Management and Oracle Receivables. See the *Oracle Order Capture API Guide* for complete details.

26.2 Oracle iStore Functionality with Oracle Quoting

You can integrate Oracle iStore with Oracle Quoting to perform the following:

- **Request sales assistance from the order review page** --- See [Section 13.2, "Setting up Sales Assistance"](#), in [Chapter 13, "Implementing Customer Assistance"](#)
- **Initiate sales assistance when users reject Terms and Conditions** --- See [Section 26.2.1, "Sales Assistance with Terms and Conditions Rejection"](#)
- **Allow sales representatives to publish quotes to web stores** --- See [Section 26.2.2, "Publishing Quotes to Stores"](#)
- **Allows users to share quotes** --- See [Section 11.2.6, "Quote Sharing"](#)

26.2.1 Sales Assistance with Terms and Conditions Rejection

In the Order Review pages prior to submitting an order, customers can be prompted to accept or reject the **Terms and Conditions** of the order. If customers reject the terms by pressing the **Disagree** button, Oracle iStore initiates a process that includes either standard contract negotiation or sales representative assistance.

To set up Sales Assistance with Terms and Conditions Rejection, you must set the following profile options at the iStore application level

1. **IBE: Reject Terms and Conditions Flow** --- Set to **QUOTING**.

This profile option specifies whether contract negotiation in the stores takes place through the Oracle iStore-Oracle Sales Contracts process flow or the Oracle Quoting-Oracle Sales Contracts process flow. Set to **CONTRACTS** to use the Oracle iStore-Oracle Sales Contracts process flow, or to **QUOTING** to use the Oracle Quoting-Oracle Sales Contracts process flow. The profile option defaults to value **CONTRACTS** if not set.

Note: If you are integrating with Oracle Quoting, it is highly recommended that you use the **Quoting** flow for Reject Terms and Conditions, in order to initiate sales assistance for your customers.

- See [Section 28.2, "Oracle iStore Functionality with Oracle Sales Contracts"](#), for information on how to use Oracle Sales Contracts in Terms and Conditions.

2. **ASO: Default Quote Status** --- Set this to **Store Draft** at the iStore application level.

This profile option determines the default quote status of an iStore shopping cart. The default quote status of Store Draft is hard coded into the iStore application beginning in release 11.5.8, but you should check the value of this profile and ensure that it is set properly. Once ordered, carts move to the Quoting status of Order Submitted. If a user requests sales assistance, the cart moves to the Quoting status of Draft. Depending upon the sales representative's actions, the cart/quote can move into other statuses as well.

3. **ASO: Default Salesrep** --- Set this to the name of the sales representative to whom the quotes should be assigned.

4. **ASO: Enable Use Contracts** --- Set to **Yes**.

Yes activates integration with Oracle Sales Contracts, to enable the display of the Review Terms and Conditions link in the Order Review page. Before setting this profile option to Yes, you must install Oracle Sales Contracts and set the Contracts (OKC) profile options listed in [Section 28.3, "Setting Up Oracle Sales Contracts"](#). This profile option defaults to value No if not set.

5. **IBE: Enforce Terms and Conditions Review by User** --- Set to **Yes**.

This profile option specifies whether customers must view the Terms and Conditions of a shopping cart before submitting the cart as an order. The profile option defaults to value No if not set.

6. **IBE: Use Sales Assistance Feature** --- Set to **Yes**.

- See [Section 13.2, "Setting up Sales Assistance"](#), for more information on enabling Sales Assistance.

7. **IBE: Use Workflow Features in iStore** --- Set to **Yes**.

- See [Section 31.2, "Oracle iStore Functionality with Oracle Workflow"](#) for more information.

8. **OKC: Contract template for standard terms and conditions** --- Set to the name of the Contract template you will use for Standard Terms and Conditions.

Oracle iStore displays the terms and conditions of the Contract template entered here when the user clicks **Review Terms and Conditions** in the Order Review page.

See *Oracle Quoting Implementation Guide* for instructions on integrating Oracle Quoting with Oracle Sales Contracts.

26.2.2 Publishing Quotes to Stores

Sales representatives can create quotes in Oracle Quoting and publish them to Oracle iStore web stores. Quotes can be published to any specialty store. Remember, however, that the user to whom you publish the quote must be able to access the specialty store where the quote is published.

To publish a quote all of the following conditions must be met:

- The Quoting sales representative has *update* access to the quote.
- The quote to be published is in the highest version.
- The quote is not in **Ordered** or **Inactive** status.
- The quote is not expired.
- The quote has a quote name.
- A web store exists to which the quote can be published and the iStore user who will view the quote has the appropriate responsibility to access the store.
- Only customers who are registered (and thus in the FND_USER table) can view published quotes in Oracle iStore. If the customer is an individual (B2C user), the quote is published to the customer. If the customer is an organization (B2B user), the quote is published to the customer contact. There must be a customer contact for an organization or the quote cannot be published.
- If the customer or customer contact is not an FND_USER, the required username field on the Oracle Quoting Publish page will be blank. The username input by the sales representative and the system generated password are e-mailed to the customer or customer contact by the Quoting application.

Note: If any of these conditions are missing, the quote will not be visible to the customer, although the published flag in Quoting will indicate publication.

26.2.2.1 Quotes Created in Single Operating Unit

When quotes are created, they are created in a specific operating unit defined in the **MO: Operating Unit** profile option. See the *Oracle Quoting Implementation Guide* for more information.

26.2.2.2 Web Published Quotes Business Flow

The following is the business flow for Oracle iStore web-published quotes:

1. Sales representative uses Oracle Quoting to **Web Publish** a quote.
When requesting publication, the sales representative can select from the known e-mail addresses for the customer or contact, and can enter a new customer e-mail if necessary.
 - See the *Oracle Quoting Implementation Guide* and the *Oracle Quoting User Guide* for more information on sales representative tasks.
2. An Oracle Quoting workflow event sends the customer an e-mail with a direct link to the quote details.
3. In Oracle iStore, the user accesses the quote in the **Cart > My Quotes** subtab. The customer can also view the quote by using the **View Quotes** link in Welcome Bin.
4. At any time, the sales representative can make changes to the quote that are visible to the user --- but only as long as the quote is not ordered. The sales representative can unpublish the quote at any time.
5. User reviews the quote. He can check out with the quote only if the quote status allows it. The quote remains accessible to the customer only as long as the quote remains in Publish status.
 - Users also can share quotes, if this functionality is enabled. See [Section 11.2.6, "Quote Sharing"](#), in [Chapter 11, "Implementing Carts and Orders"](#), for more details.
6. From the **Review Order Details and Confirm** page, the user can:
 - Make payment **type** modifications.
 - Request sales assistance --- See [Section 13.2.1, "Sales Assistance Business Flow"](#), for more information on the Sales Assistance process.
 - Place the quote as an order.
 - Review Terms and Conditions (if integrating with Oracle Sales Contracts).

Note: For published quotes, Oracle iStore does not consider the value of the profile option, **IBE: Reject Terms and Conditions Flow**. For published quotes, the Sales Assistance flow always is used.

7. For other than payment type changes, the customer **must contact the sales representative** to modify the web published version of the quote. This can be done using the **Request Sales Assistance** functionality.
8. From Oracle Quoting, sales representatives can edit, re-publish, un-publish, and inactivate quotes.
9. Sales representatives can also view Oracle iStore saved carts as quotes in Oracle Quoting when customers request sales assistance.

26.2.2.3 Setting Web Publish Profile Options

The following profile options impact the Oracle iStore-Oracle Quoting integration.

1. **IBE: iStore Non Secure URL** -- This profile option must be set at the application level to enable Web Publishing functionality. It specifies the base URL for the non-secure server (HTTP). If it is not set, you cannot switch between HTTP and HTTPS. The profile option must have the following syntax:

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

2. **IBE: Use Quote Publishing** -- If set to **Yes** at the application level to **iStore**, this profile option allows customers to access quotes in two areas in the Customer UI:

- Enables the **View Quotes** link in the Welcome Bin on stores' home pages.
- Enables the **My Quotes** subtab within the Cart button in the Customer UI.

This profile option defaults to No if not set.

3. **ASO: Default Sales Rep** — At the iStore application level, this profile option determines the default sales representative assigned to a shopping cart when the customer requests sales assistance. At the site level, this is the default sales representative if the user who is logged into Quoting is not a valid sales representative.
4. **ASO: Default Quote Status** --- Set this to **Store Draft** at the iStore application level.

This profile option determines the default quote status of an iStore shopping cart. The default quote status of Store Draft is hard coded into the iStore application, but you should check the value of this profile and ensure that it is set properly. Once ordered, carts move to the Quoting status of Ordered. If a user requests sales assistance, the cart moves to the Quoting status of Draft. Depending upon the sales representative's actions, the cart/quote can move into other statuses as well.

- 5. ASO: Enable Web Publishing** — If set to **Yes**, quotes can be published to Oracle iStore specialty stores. Note that this should be at the site level or the Oracle Quoting application level.

See the *Oracle Quoting Implementation Guide* for descriptions and explanations of all Oracle Quoting profile options.

Integrating Oracle iStore with Oracle Sales Applications

This chapter details sales Lead Import implementation in Oracle iStore, and contains information on the integration of Oracle iStore 11i with Oracle Sales applications -- including Oracle Sales Online (OSO) and Oracle TeleSales (OTS).

Topics include:

- [Oracle Sales Product Suite Overview](#)
- [Oracle iStore Lead Import Functionality Overview](#)
- [Oracle iStore Lead Import Process Flow](#)
- [Setting up Oracle Sales Applications](#)
- [Setting up Oracle iStore to Generate Leads](#)

27.1 Oracle Sales Product Suite Overview

Oracle Sales is a family of integrated applications designed to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and web specialty stores to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

The Oracle Sales family of applications includes:

- Oracle Sales Online
- Oracle Field Sales Laptop/Palm/Wireless

- Oracle TeleSales
- Oracle Incentive Compensation
- Oracle Partners Online
- Oracle Sales Intelligence
- Oracle Collections

To learn more about the Oracle Sales family of applications, see the Oracle Sales Online documentation on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>). Navigate to Top Tech Docs > E-Business Suite > Sales.

27.2 Oracle iStore Lead Import Functionality Overview

The Lead Import functionality in Oracle iStore can be a valuable marketing tool to help you sell, cross-sell, and up-sell products, as well as track the specialty store behavior of customers and potential customers. Leads are generated for a specific timeframe using the **iStore Lead Import Concurrent Program Request Set** which pulls customer data (such as name, address, phone numbers, etc.) from:

- Submitted Oracle iStore orders
- Active shopping carts that have expired in an Oracle iStore web store
- Saved shopping carts that have expired in an Oracle iStore web store

The concurrent program set populates the lead import data into database tables which are utilized by Oracle Sales Online and Oracle TeleSales.

Note: For more information on Oracle Sales Online and Oracle TeleSales, see the *Oracle Sales Implementation Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

27.2.1 Oracle iStore Lead Import Benefits

Oracle iStore's Lead Import functionality can provide the following benefits:

- Oracle iStore orders and expired cart data can be imported into Oracle Sales Online and Oracle TeleSales as leads. Sales representatives can access the information in these applications.
- Contact information and browsing or purchasing habits can be easily captured for customers and potential customers.

- Lead information retrieved includes names, addresses, phone numbers, and e-mail addresses (if available in the customer registration), as well as browsing or purchasing behavior (available through order or cart analysis).
- Customer information collected can be reused for tracking or marketing purposes.
- Sales representatives can make follow-up contact with users who have left carts in stores.
- The lead import concurrent program set allows party exclusion. For example, you can exclude data from your company's internal orders or specific organizations, simply by entering the party number(s) in the Enter Parameters screen of the concurrent program.
- Specific Oracle E-Business Suite roles or combinations of roles can be excluded from the data capture. For example, you may wish to exclude orders placed by users having the iStore Reseller role or certain B2B user roles. Roles used in Oracle E-Business Suite can be found in each product's administration documentation. Information about Oracle iStore roles can be found in [Chapter 12, "Implementing Users and Registration"](#).

27.3 Oracle iStore Lead Import Process Flow

The following is the process flow for Oracle iStore lead import functionality.

See the graphic, [Figure 27–1, "Oracle iStore - Lead Imports Process Flow"](#), for a high-level, graphical representative of this flow.

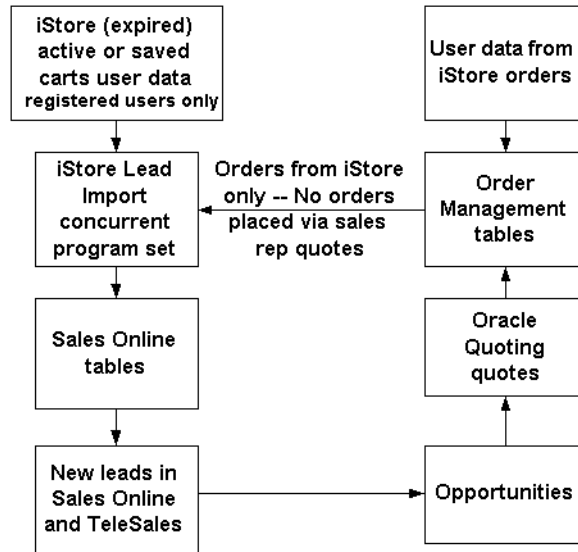
1. **Oracle iStore Lead Import Concurrent Program Request Set** pulls customer data from Oracle iStore orders (via Order Management tables). The same concurrent program set pulls data from expired (saved and active) carts.
 - When pulling order data, **all orders** --- except those placed by sales representatives --- are pulled from the Order Management tables. The order status is not considered by the concurrent program.
 - Orders placed by sales representatives are not considered for inclusion in the data, since these leads have already been reviewed from a marketing perspective. Quotes published to web stores by sales representatives are not included in lead imports, since these are already identified as opportunities.
 - The concurrent program pulls only data from expired carts (active or saved) created by registered users. No unexpired active or saved carts are considered.

- Two profile options control the number of days that must pass without activity before a cart is considered expired:
 - IBE: Active Cart Expiration Duration (# days)
 - IBE: Saved Cart Expiration Duration (# days).
- See [Section 11.1.18, "Shopping Cart Expiration Values"](#), for more information.
- If multiple addresses exist for a customer, then the concurrent program selects the first party site address from the list of primary addresses.
 - Only data from registered users is considered.
2. Oracle iStore Lead Import concurrent program set pushes data into Oracle Sales data tables using private Oracle Sales APIs.
 - The following Oracle Sales database tables are populated in this process:
 - AS_SALES_LEADS
 - AS_SALES_LEADS_LINES
 - AS_ACCESSES_ALL
 - AS_INTERESTS
 - AS_SALES_LEADS_CONTACTS
 3. Sales representatives in Oracle Sales Online or Oracle TeleSales can access the leads and market to them, turning them into opportunities.
 - Leads imported through Oracle iStore have the lead names: **iStore Cart Lead** and **iStore Order Lead**, making them easy to distinguish from non-iStore leads.
 - Sales representatives can query the leads in OSO and OT using the mandatory Source Code (also called Promotion Code) used when running the concurrent program.

Note: If an imported cart line already has a source code associated with it (for example, because it was generated through its visibility on an external website), then the iStore lead import program will *not* overwrite the original source code.
 4. Sales representatives use Oracle Quoting to change opportunities into quotes.
 5. Sales representatives can directly create orders from quotes, or they can Web Publish quotes to Oracle iStore, where the customers can then place the orders.

The figure below, **Oracle iStore - Lead Imports Process Flow**, illustrates the lead import process from the Oracle iStore perspective.

Figure 27-1 Oracle iStore - Lead Imports Process Flow



27.4 Setting up Oracle Sales Applications

This section contains limited information on how to configure the Oracle Sales applications to utilize leads imported from Oracle iStore.

For complete instructions, please refer to the latest *Oracle Sales Implementation Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

27.4.1 Oracle Sales Profile Options Required for iStore Lead Import

In order to use the Oracle iStore Lead Import functionality, you must set the following Oracle Sales family profile options at site or application levels.

For more information, see the **Setting up Lead Management** section of the *Oracle Sales Implementation Guide*.

- **OS: Assign New Lead ---** This profile option is used by Oracle Sales when assigning resources (sales representatives) to the leads. Following is the impact of setting this profile option:

If **set to No**, no resource will be assigned to the lead and you must run CRM Application Foundation Territory Manager concurrent program Assign Territory Access to assign resources to the lead. See *Oracle CRM Application Foundation Implementation Guide* for details on how to run this concurrent program.

If **set to Yes**, then at runtime the system attempts to auto-assign a resource for the lead in the following order:

1. An appropriate Territory Manager resource is attempted. If not found, then:
2. The value of OS: Default Sales Rep ID is used (see below). If this is null, then:
3. The lead is assigned to the user running the concurrent program, if he belongs to a sales group.
4. If none of the above steps manages to assign a resource to the leads, then the result will be the same as if you the profile option to **No**. Unless you run the concurrent program mentioned in the *If set to No* paragraph above, the leads will have no owner in the Sales applications, but you will still be able to retrieve them by searching for **New** leads in the Sales applications.

Caution: Setting this profile option to **Yes** can slow performance.

- **OS: Auto Qualify Lead** --- This profile option turns automatic qualification for sales leads on or off. A setting of **Yes** causes the application to attempt to qualify a lead each time the lead is updated. A setting of **No** means the user must qualify the lead manually by selecting the Qualified checkbox in Oracle Sales Online. Defaults to **No** if not set. Set this profile option at site level.
- **OS: Default Decision Timeframe for Leads** --- This profile option is used by the leads qualification process to set a default value in the UI and APIs. If not set, this profile inserts a **null** value in the database table. The profile option defaults to **Within 1 Week** if not set.
- **OS: Default Lead Scorecard** --- This required profile option is used by Oracle Sales to rank the sales lead. If not set, the scoring engine will not function. While creating leads, the UI retrieves this value and passes it to the scoring APIs.
- **OS: Default Vehicle Response Code for Leads** --- This profile option is used by Oracle Sales to specify the default mode for contacting the customer. Default value is **User**. If not set, this profile inserts a **null** value in the database table.
- **OS: Default Channel for Leads** --- This required profile option is used to specify the default channel in the UI and APIs. The default value is **Direct**. If

not set, then the application inserts a **null** value and notifies the user of an error.

Note: All leads created from Oracle iStore are **Direct** leads in terms of channels in Oracle Sales applications.

Refer to *Oracle Sales Implementation Guide* for additional information.

27.5 Setting up Oracle iStore to Generate Leads

After you have set the required Oracle Sales profile options, the following steps must be done to create the leads on the Oracle iStore side:

1. Set iStore Lead Import profile options -- See [Section 27.5.1, "Setting iStore Lead Import Profile Options"](#)
2. Ensure proper setup of user running concurrent program --- See [Section 27.5.2, "Ensure User Setups Specific to iStore Lead Import Concurrent Program Set"](#)
3. Run or schedule to run the Lead Import Concurrent Program Request Set -- [Section 27.5.3, "Running iStore Lead Import Concurrent Program Set"](#)

27.5.1 Setting iStore Lead Import Profile Options

Before running the concurrent program request set, the following profile options must be set at the site or application level for Oracle iStore:

- **IBE: Order Lead Import Interval (In Days)** and **IBE: Quote Lead Import Interval (In Days)** --- The values of these two profile options (one for orders and one for expired carts) are used to determine the number of days between retrieval of lead data. If no value is set, these default to 1.
- **Important:** If you are running the **iStore Lead Import concurrent program** on a schedule (as is recommended), then set these two profile options to values that **exactly match** the number of days of the concurrent program schedule. For example, if the concurrent program is set to run every 7 days, then set the value of each of these two profile options to 7. This synchronization is important because if the profile options are set to values that do not match the schedule, then the profile options may inappropriately impact the collection data.

See [Section 27.5.3.1, "Best Practice for iStore Lead Import Concurrent Program Set"](#) for more details.

- **IBE: Email Address For Lead Import Status** --- In this profile option, you specify the e-mail address(es) where the lead import program status notification will be sent.

Use the following format:

`john.doe@company.com`

Or if entering more than one e-mail address, separate them with single space, a single comma, or a single comma and then a space, as in the following examples:

`john.doe@company.com<space>john.doe@company.com`

`john.doe@company.com, <space>john.doe@company.com`

`john.doe@company.com, john.doe@company.com`

There is no default value for this profile.

Note: If you leave this profile option blank, then no e-mail is sent.

27.5.2 Ensure User Setups Specific to iStore Lead Import Concurrent Program Set

Following are the high-level steps which must be followed in order for the user to whom you grant the iStore Concurrent Program Responsibility to run the iStore Lead Import concurrent program set. Refer to the documentation listed in the section below for detailed instructions.

Steps

1. **Create an employee** in Oracle Human Resources Management System (HRMS).
 - a. Make sure that you enter **Employee** in the Category field.
 - b. Make sure you create a **username** for the employee.
 - See *Using Oracle HRMS - The Fundamentals* or *Managing People Using Oracle HRMS* for instructions.
2. **Enable the user as a resource** in Oracle CRM Application Foundation Resource Manager.
 - See *Oracle CRM Application Foundation User Guide*, Resource Manager chapter, for instructions on importing resources.
3. During the import resource process, be sure to grant the user a **valid role type** used by the Oracle Sales family of applications --- for example, SALES, TELESales, FIELDsales, and PRM roles.

- See the Oracle Sales Online documentation for more information on appropriate user roles for these applications.
4. Grant **iStore Concurrent Program Responsibility** to the user.
 - For instructions, see [Section 4.1.2.2, "Set up Concurrent Program Administrator"](#).

27.5.3 Running iStore Lead Import Concurrent Program Set

To generate the leads, run **iStore Lead Import Set**. This is a concurrent program set containing two concurrent programs discussed below.

Important: See [Section 27.5.3.1, "Best Practice for iStore Lead Import Concurrent Program Set"](#), for best practice information.

The concurrent program request set, **iStore Lead Import Set**, pulls data into the Oracle Sales database tables, where it can be used by Oracle Sales Online and Oracle TeleSales. The request set contains two concurrent programs:

- **iStore Lead Import Quotes** -- This program imports only **expired** *active* or *saved* shopping **carts**. The number of days before carts expire is controlled by the profile options: **IBE: Active Cart Expiration Duration (# days)** and **IBE: Saved Cart Expiration Duration (# days)**.
- **iStore Lead Import Orders** --- This program imports only **orders** from Oracle iStore.

For more information:

- See the Concurrent Programs Appendix, [Section B.11, "Running Concurrent Programs"](#), for general instructions on how to run concurrent programs.
- Refer to the *Oracle Applications System Administrator's Guide* for information on Oracle Applications concurrent programs.

27.5.3.1 Best Practice for iStore Lead Import Concurrent Program Set

This section contains best practice information for running **iStore Lead Import Concurrent Program Set** to generate leads into Oracle Sales Online and Oracle TeleSales. It is important that you read and understand the instructions in this section.

- See the Concurrent Programs Appendix, [Section B.11, "Running Concurrent Programs"](#), for general instructions on how to run concurrent programs.

- For data entry instructions on the iStore Lead Import Parameters screen -- where the lead import parameters are entered -- see [Section 27.5.4, "iStore Lead Import Concurrent Program Enter Parameters Screen"](#).

First Time Running the Concurrent Program Set

It is recommended that the first time you run this request set, you enter a **Begin Date** for the data collection. See

Parameters window. Enter an **End Date** if desired, but the End Date will default to system date if not entered manually.

Subsequent Running of the Concurrent Program Set

After you have run the request set for the first time, it is **strongly recommended that you:**

- Set the concurrent program set to run on a **schedule**, such as every week, bi-weekly, or every month.
- Set the following profile options to **exactly match the number of days** in the concurrent program set schedule:
 - **IBE: Order Lead Import Interval (In Days)**
 - **IBE: Quote Lead Import Interval (In Days)**

Note: If the interval profile options shown above are set to a fewer number of days than the concurrent program set schedule, then the interval profile options will capture data incorrectly. See the following example:

Example: If the concurrent program set is scheduled to run every 30 days and the interval profile options are each set to 10, then the concurrent program set will still run every 30 days -- but lead data will be captured only for 10 days.

When the concurrent program is run the second time, the End Date of iStore Lead Import Orders is Begin Date plus value of the profile IBE: Order Lead Import Interval. And for iStore Lead Import Quotes the End Date for the next run is Begin Date plus value of the profile IBE : Quote Lead Import Interval.

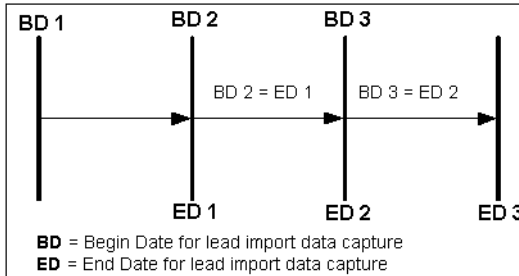
The graphic below shows how **Begin Date** and **End Date** are derived, if the concurrent program set is run on a schedule.

Figure 27–2 How Lead Import Begin and End Dates are Determined**First time, manually run the concurrent program set:**

Enter a **Begin Date** Enter an **End Date** if desired, but **End Date** will default to system date (today's date) if not set.

After the first time, run request set on schedule:

Begin Date will automatically be the last **End Date**.



Set the following profile options to match days of concurrent program schedule:

- IBE: Order Lead Import Interval (In Days)
- IBE: Quote Lead Import Interval (In Days)

Example 27–1 iStore Lead Import Begin and End Dates on 7-Day Schedule

This example shows sample begin and end dates if the concurrent program set is run on an every-7-days schedule and the interval profile options are set to 7.

Note: **End Date** defaults to system date if not entered manually.

First time: Enter **Begin Date** manually.

Example Begin Date: 01-APR-2002 08:30:00 (April 1, 2002, 8:30 a.m.)

Example End Date: 01-MAY-2002 08:30:00 (May 1, 2002, 8:30 a.m.)

After running for the first time, set the concurrent program to run on a schedule.

For example:

Schedule the concurrent program set to run every 7 days and set IBE: Order Lead Import Interval and IBE: Quote Lead Import Interval to 7.

The concurrent program scheduler will select its Begin Date as last End Date that the program was run.

Note: To avoid overlaps or missed data, the system uses mathematical logic to stop the lead import batch process one millisecond before the actual End Date. Then it uses the actual End Date for the Begin Date of the next batch. See examples below.

1st scheduled running:

Begin Date = 01-MAY-2002 08:30:00

End Date = 08-MAY-2002 08:29:99

2nd scheduled running:

Begin Date = 08-MAY-2002 08:30:00

End Date = 15-MAY-2002 08:29:99

3rd scheduled running:

Begin Date = 15-MAY-2002 08:30:00

End Date = 22-MAY-2002 08:29:99

4th scheduled running:

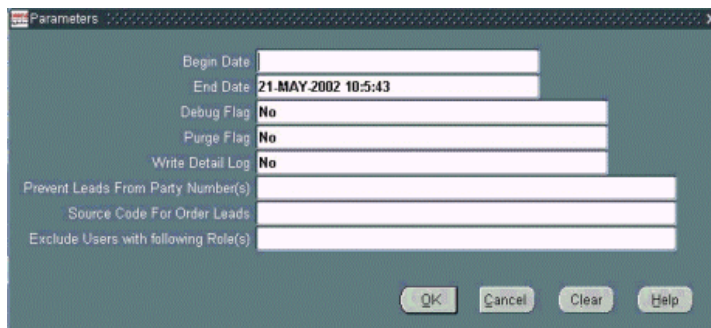
Begin Date = 22-MAY-2002 08:30:00

End Date = 29-MAY-2002 08:29:99

27.5.4 iStore Lead Import Concurrent Program Enter Parameters Screen

The graphic below, iStore Lead Import Concurrent Program Enter Parameters Screen, shows the Parameters form used in running the program. The fields in the screen are described below the graphic.

Figure 27-3 iStore Lead Import Concurrent Program Enter Parameters Screen



Begin Date	
End Date	21.MAY.2002 10:5:43
Debug Flag	No
Purge Flag	No
Write Detail Log	No
Prevent Leads From Party Number(s)	
Source Code For Order Leads	
Exclude Users with following Role(s)	

OK Cancel Clear Help

27.5.4.1 Begin Date and End Date Fields

The first time you run the concurrent program set, be sure to run the programs manually by entering Begin and End Dates in the Parameters screen. When entering dates, use the format DD-MON-YYYY. For example, April 1, 2002 would be entered as 01-APR-2002. You can also enter hours and minutes, in the format HH:MM:SS. For example, 8:30 a.m. would be entered: 08:30:00.

Note: The End Date defaults on system date (today's date) if not set. After the first time run, the Begin Date defaults to the second after the last End Date completed.

After you have run the concurrent program for the first time, it is recommended that you schedule the remaining lead import jobs, setting the interval profile options (IBE: Order Lead Import Interval and IBE: Quote Lead Import Interval) to the same number of days as the concurrent program set schedule.

27.5.4.2 Exclusion of Party Numbers Field

You can exclude specific parties from the lead data by entering the Party Number. The party number is an exposed field in Oracle customer modules, or it can be obtained from the HZ_PARTIES table, PARTY_NUMBER column. This is not to be confused with party_id which is an internal unique key on HZ_PARTIES. When entering party numbers, separate multiple parties by commas.

27.5.4.3 Source Code for <Order/Quote> Leads Field

You must identify sets of leads by promotion code in the **Source Code for Order Leads** field. This field maps to Source Code in the Oracle Sales applications, and originates in AMS_SOURCE_CODES_VIEW table. In the **iStore Lead Import Quotes** concurrent program, you will specify a source code for carts, while in the **iStore Lead Import Orders** concurrent program, you specify a source code for orders. This source code tagging ensures consistency in marketing campaign source code tracking. For example, you can set one promotion code to mark the carts leads and another to mark the order leads. The source code is validated against AMS_SOURCE_CODES_VIEW, and only one code can be used per program submission.

In Oracle Sales Online and Oracle TeleSales, sales representatives can query by source code (also called promotion code).

27.5.4.4 Exclude Users with Following Roles Field

You can exclude the capturing of user data from users with specific user roles by entering the role names separated by commas. For example, you may wish to exclude sales representative roles, iStore reseller roles, or other specific Oracle application roles. Role names can be obtained in documentation of the specific application carrying the role, and you can view a list of user roles in the Oracle CRM Technology Foundation System Administrator's Console (log in as sysadmin in the JTF login and navigate to Users screens).

27.5.4.5 Logging Options Fields

The following fields enable various logging options. Enter either **Yes** or **No** in these fields. All three default to **No** if not set. Remember, setting the logging options to **Yes** may increase the time it takes to run the concurrent programs.

- **Debug Flag** -- **Yes** enables concurrent manager logging; log results can be viewed in the concurrent manager log file.
- **Purge** -- **Yes** enables two activities:
 1. The main log table (IBE_LEAD_IMPORT_LOG) is populated with following information:
 - Status to show failure/successes and to differentiate previous batch from current batch as follows: The previous batch of leads is marked with a 0 to show last one run; the current batch shows either 1, meaning at least partial success, or -1, meaning complete failure.
 - Begin Date for the last data capture
 - End Date for the last data capture
 - Number of Attempts (number of lead creates attempted)
 - Number of leads successfully generated
 - Number of leads that failed
 2. Purges the log details table each time the program is run. The name of the table is:

IBE_LEAD_IMPORT_DETAILS

- **Write Detail Log** -- **Yes** enables the writing of details to the log details table (IBE_LEAD_IMPORT_DETAILS) for every lead that is created. To see the details in the log details table, you must perform an SQL query on the table.

Integrating Oracle iStore with Oracle Sales Contracts

This chapter describes the integration of Oracle iStore 11i with Oracle Sales Contracts.

Main topics in this chapter include:

- [Overview of Oracle Sales Contracts](#)
- [Oracle iStore Functionality with Oracle Sales Contracts](#)
- [Setting Up Oracle Sales Contracts](#)

28.1 Overview of Oracle Sales Contracts

Oracle Sales Contracts automates the full life cycle of a contract for online selling. You can author, execute and control non-industry specific contracts with Oracle Sales Contracts. Oracle Sales Contracts 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.

28.2 Oracle iStore Functionality with Oracle Sales Contracts

You can integrate Oracle iStore with Oracle Sales Contracts 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 specialty store when they proceed to checkout. Oracle iStore retrieves the standard terms and conditions from a contract template.

- Customers can accept or reject the contract terms in the specialty store. If customers reject the terms, Oracle iStore initiates an online contract negotiation process.

You must set up a standard contract template in Oracle Sales Contracts for use with all initial quotes. You can set up different standard contract templates for each Oracle iStore customer responsibility.

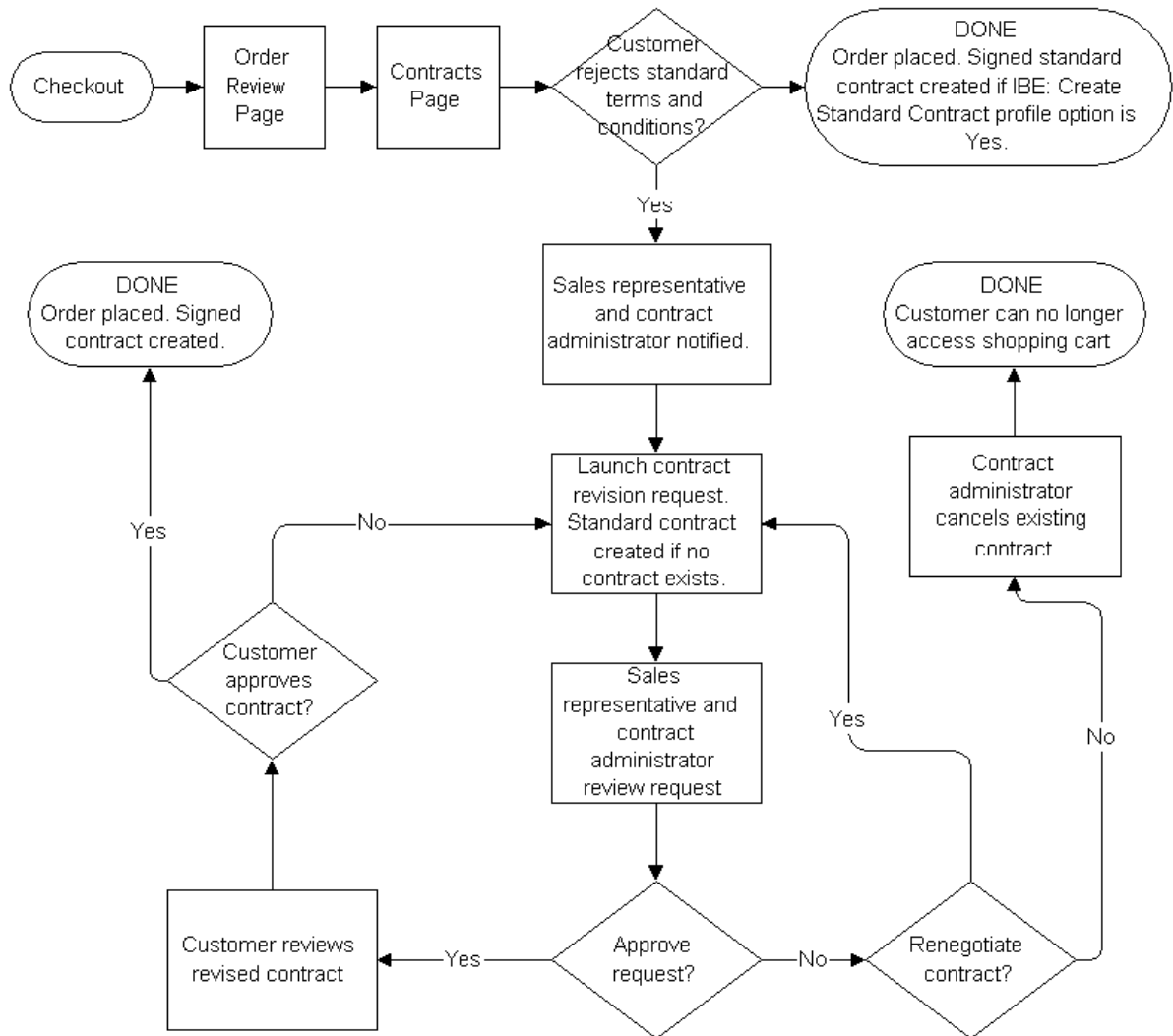
You can use one of two possible contract creation process flows:

- [The Oracle iStore-Oracle Sales Contracts Process Flow](#)
- [The Oracle Quoting-Oracle Sales Contracts Process Flow](#)

28.2.1 The Oracle iStore-Oracle Sales Contracts Process Flow

The following diagram shows the process flow for contract creation and negotiation in Oracle iStore and Oracle Sales Contracts.

Figure 28–1 Oracle iStore-Oracle Sales Contracts Process Flow



When customers proceed to checkout with a shopping cart, Oracle iStore 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 customers disagree with the terms and conditions, the following sequence of events takes place:

1. Oracle iStore forces 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 sends an e-mail to the sales representative, contract administrator, and customer with the cart 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 Sales Contracts, and also in Oracle CRM Application Foundation as a CRM Resource.
5. The contract administrator looks at the cart 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.
 - For information about the required profile options to implement this functionality -- including the one that specifies the contract administrator -- see [Section 28.3, "Setting Up Oracle Sales Contracts"](#), and [Section A.22, "Oracle Sales Contracts Integration Profile Options"](#).
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.

Note: Oracle iStore does not launch the contract process flow for published quotes. If a customer wants to negotiate a contract for a published quote, the customer must request sales assistance as described in [Section 28.2.2, "The Oracle Quoting-Oracle Sales Contracts Process Flow"](#).

28.2.2 The Oracle Quoting-Oracle Sales Contracts Process Flow

If you have set up Oracle Quoting, you can use the Oracle Quoting-Oracle Sales Contracts process flow. In this process flow, the customer requests sales assistance if he wants to negotiate a contract or needs help with his order.

After the user requests sales assistance, the shopping cart becomes a quote in Oracle Quoting. From here, the sales representative, using Oracle Quoting, controls further action with the cart/quote:

- The sales representative can access the cart/quote and make changes to it. These changes will be visible to the user in the Oracle iStore web store, under the My Quotes subtab within the Cart menu, but only as long as the quote remains in Published status (a sales representative can unpublish a quote at any time).
- The user then can checkout with the quote, if the quote status allows it.
- The display of the Review Terms and Conditions link and the Place Order button in the published quote are driven by the Quote Status diagram defined in Quoting. If there is a transition between the current quote status and the "ORDERED" status, and *if the quote is still published on iStore* then:
 - The Place Order button is displayed on the Order Review page.
 - The Review Terms and Condition link is displayed on the Order Review page.
- The sales representative can keep the standard Terms and Conditions set in the contract, or he can request contract changes which then will be included in the quote in the Oracle iStore web store.
- The sales representative can place the order for the user.

For more information, see:

- [Section 26.2, "Oracle iStore Functionality with Oracle Quoting"](#)
- *Oracle Quoting Implementation Guide*
- *Oracle Quoting User Guide*

Note: If a customer wants to negotiate a contract for a published quote instead of a shopping cart, Oracle iStore always launches the Oracle Quoting-Oracle Sales Contracts process flow, so that the customer must request sales assistance.

28.3 Setting Up Oracle Sales Contracts

Use the following procedure to set up contract functionality in Oracle iStore.

Note: This procedure assumes that you are implementing the Oracle iStore-Oracle Sales Contracts process flow.

Prerequisites

- You have created at least one contract template in Oracle Sales Contracts. See *Oracle Sales Contracts User Guide* 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 Sales Contracts integration:
 - Set the profile option **ASO: Enable Use Contracts** to **Yes** at the iStore application level.
 - Set the profile option **IBE: Reject Terms and Conditions Flow** to **CONTRACTS** at the iStore application level.
 - Set these profile options at the application level to iStore, according to your business needs:

--IBE: Enforce "Terms and Conditions" Review by User**--IBE: Notification User Role**

- Set the profile option **IBE: Use Workflow Features in iStore** at the iStore application level to **Yes**.
- Set these 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**
 - OKC: User Directory**

See

- Optional: Set the profile option **OKC: Default group** for contracts created from quote.

For profile option descriptions and values, see:

- [Section A.11, "Customer UI Shopping Cart and Checkout Profile Options"](#)
 - [Section A.20, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#)
 - [Section A.22, "Oracle Sales Contracts Integration Profile Options"](#)
2. For each of your organizations, set up the default sales representative user who will receive the contract-related notifications, as follows:
 - a. Log in to Oracle Forms with the Human Resources responsibility.
 - b. Choose **Work Structures > Organization > Description**.
The Find Organization window opens.
 - c. 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.
 - d. In the Organization Classifications region, select **Operating Unit** in the Name fields.
 - e. Click **Others**.

The Additional Organization Information window opens.

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

The Additional Organization Information - Default Notify User window opens.

- g. Place your cursor in the Default Notify User field. The Default Notify User window opens.
- h. 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.

Note: Use uppercase letters only when entering user names.

- i. In the Additional Organization Information - Default Notify User window, click **OK**.
- j. Save the record.
- k. In the Navigator, choose **People > Enter and Maintain**. The Find Person window opens.
- l. In the Find Person window, enter the search criteria for the contract sales representative and click **Find**.

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

- m. In the Office Details tab, enter the contract sales representative's e-mail address in the Email field. The contract sales representative will receive notifications at this e-mail address.
 - n. Save the record.
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. See [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#) for details.

Guidelines

To use the Oracle Quoting-Oracle Sales Contracts process flow instead, see [Section 26.2, "Oracle iStore Functionality with Oracle Quoting"](#).

Set the profile option **IBE: Reject Terms and Conditions Flow** to **QUOTING** at the iStore application level. Also set the following profile options:

- **ASO: Default Salesrep**—This profile option specifies the sales representative to whom the quotes should be assigned.
- **ASO: Enable Use Contracts**—Set this profile option to **Yes** at the iStore application level.
- **IBE: Enforce "Terms and Conditions" Review by User**—Set this profile option at the iStore application level according to your business needs.
- **IBE: Use Sales Assistance Feature**—Set this profile option to **Yes** at the iStore application level.
- **IBE: Use Workflow Features in iStore**—Set this profile option to **Yes** at the iStore application level.
- **OKC: Contract template for standard terms and conditions**—This profile option specifies the template that Oracle iStore uses for standard terms and conditions.

See [Appendix A, "Profile Options"](#), for descriptions of these profile options.

See *Oracle Quoting Implementation Guide* for instructions on integrating Oracle Quoting with Oracle Sales Contracts.

Integrating Oracle iStore with Oracle Shipping Execution

This chapter describes the integration of Oracle iStore 11i with Oracle Shipping Execution. Topics include:

- [Overview of Oracle Shipping Execution](#)
- [Setting up Oracle Shipping Execution](#)

29.1 Overview of Oracle Shipping Execution

The Oracle Order Management Suite's Shipping Execution module allows you to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing.

29.2 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. 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 with Oracle9iAS Web Cache

This chapter describes the integration of Oracle iStore 11i with Oracle9iAS Web Cache. Topics include:

- [Overview of Oracle9iAS Web Cache](#)
- [Oracle iStore Functionality with Oracle9iAS Web Cache](#)
 - [Preview Mode Not Supported Through 9iAS Web Cache](#)
- [Setting Up Oracle9iAS Web Cache](#)

30.1 Overview of Oracle9iAS Web Cache

An integrated component of Oracle's application server infrastructure, Oracle9iAS Web Cache is an innovative content delivery solution designed to accelerate dynamic web-based applications and reduce hardware costs.

Oracle9iAS Web Cache accelerates the customer presentation of Oracle iStore's non-transactional content, including:

- Static pages and images
- Catalog pages

By compressing and caching dynamically generated content, Oracle9iAS 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 Oracle9iAS Web Cache-specific tags in the HTML, Oracle9iAS Web Cache is also capable of caching content with some personalization.

Additionally, the cache server can load balance requests across multiple HTTP servers.

Oracle9iAS Web Cache is compatible with Oracle HTTP Server or any other HTTP-compliant application web server.

Possible scenarios for deployment of Oracle9iAS Web Cache include the following:

- Deploy Oracle9iAS Web Cache on the same computer as the application web server or on a separate computer.
- Use Oracle9iAS Web Cache as a load balancer or in a Failover pair.
- Install Oracle9iAS Web Cache inside or outside the firewall.

30.2 Oracle iStore Functionality with Oracle9iAS Web Cache

In order to integrate Oracle9iAS Web Cache 9.0.2.0.0 with the Oracle iStore Customer UI, you must deploy it in the same domain as the application web servers. The reason for deploying it in the same domain is that Oracle iStore session cookies are created by application servers and are only visible to other servers within the same domain. The subdomain, however, can be different.

You can set up Oracle9iAS Web Cache to cache and serve the following iStore pages and files:

- Catalog JSPs
 - ibeCCt*.jsp
- Other pages, such as:
 - style sheet files
 - static HTML pages
 - GIF and JPG/JPEG image files
 - JavaScript (*.js) files
 - jtfdload.jsp files

For complete information about Oracle9iAS Web Cache deployment, see documentation for Oracle9iAS Web Cache, Release 9.02.0.0. If you are running a

version of Oracle9iAS Web Cache other than the one listed here, please use the documentation appropriate to your version.

30.2.1 Preview Mode Not Supported Through 9iAS Web Cache

Oracle iStore's Preview mode allows merchants to preview Customer UI specialty stores while working on them in the Store Administration UI. In a typical scenario, when the merchant selects the Preview button in Store Administration UI, the Customer UI is retrieved through the application server and uses data cached through JTT Cache. This ensures freshly cached data.

There may be cases however, when the merchant enters Preview mode through Oracle 9iAS Web Cache. This type of preview, however, is not supported due to likelihood of seeing stale cached data.

30.3 Setting Up Oracle9iAS Web Cache

Set up Oracle9iAS Web Cache to cache and serve Oracle iStore Customer UI pages, using the following procedures.

Prerequisites

Your Oracle iStore implementation must meet the following requirements for integration with Oracle9iAS Web Cache:

- Your stores must not allow Express Checkout. Set the profile option **IBE: Use Express Checkout** to **No**. See [Section 11.3.8, "Express Checkout"](#) for more information.
- Your stores must use the specialty store price lists. Set the profile option **IBE: Use Price List associated with Specialty Store** to **Yes**. See [Chapter 9, "Implementing Pricing"](#), for more information.
- Set the profile option **IBE: Use Web Cache Feature** to **Yes**. This enables Oracle iStore to create the cookies that you will set up Oracle9iAS Web Cache to use for session tracking.

Steps

1. [Perform Initial Setup for Oracle9iAS Web Cache.](#)
2. [Create a Rule for Multiple Documents with Same Selector \(URL\) 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 Test Environment.](#)

30.3.1 Perform Initial Setup for Oracle9iAS Web Cache

Check your deployment requirements. Make sure the following Oracle9iAS Web Cache setups are correct:

- Administration Port and Protocol
- Invalidation/Statistics Port and Protocol
- Security
- Resource Limits
- Process Identity
- Apology Pages
- Application Web Servers
- Oracle9iAS Web Cache Listen Ports
- Access Logs

For complete information about Oracle9iAS Web Cache deployment, see documentation for Oracle9iAS Web Cache, Release 9.02.0.0. If you are running a version of Oracle9iAS Web Cache other than the one listed here, please use the documentation appropriate to your version.

30.3.2 Create a Rule for Multiple Documents with Same Selector (URL) by Cookies

You can set up Oracle9iAS Web Cache to use the Oracle iStore cookie, **CombinedCookie**, to identify multiple versions of the same catalog page based on the cookie value. CombinedCookie allows the Web Cache to then cache the page versions separately for different users.

The cookie, **CombinedCookie**, combines:

- Minisite ID (minisite_id)
- Responsibility ID (resp_id)
- Language (language_code)
- Currency (currency_code)
- Customer type - Customer type can be anonymous, individual, business, or primary business user.

While serving a page, Web Cache looks at the CombinedCookie to determine if the appropriate version of the page is available in the cache. If it is available, then the page is served from the cache. If it is not, the request is forwarded to Apache/Jserv and the resulting page is cached against that page version.

Using the steps below, create a rule for multiple documents with the same selector by the **CombinedCookie** cookie.

You will later create a selector association between this rule and the catalog JSPs, as described in [Section 30.3.7, "Create a Selector Association for the Multiple Documents Rule"](#).

Steps

1. In Oracle9iAS Web Cache Manager, choose **Multiple Documents with Same Selector by Cookies**, under **Administering Web Sites > Cacheability Rules**.
2. Select **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 catalog pages with the following parameters:
 - Cookie Name = CombinedCookie
 - Cache without Cookie = NO
4. Select **Apply Changes** when finished.

30.3.3 Create Session/Personalized Attribute Definitions

Session tracking does not alter the actual content of a page. Therefore, session definitions enable Oracle9iAS 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.

For Oracle9iAS Web Cache to serve pages to a client browser, the browser's cookies must be enabled. If cookies are disabled, Oracle iStore still works, but Web Cache does not serve its pages. Instead, Oracle9iAS Web Cache redirects any HTTP request that does not include session cookies to the application servers.

Oracle iStore uses the following session cookies:

- **JTT Session Cookie** - Contains information about the JTT session
- **ICX Session Cookie** - Contains information about the database session

You must create the session definitions **JTTSession** and **ICXSession** so that Oracle9iAS Web Cache can track the session cookies.

You must also create personalized attribute definitions for the Oracle iStore cookies **PersonName** and **CartTotal**.

Oracle9iAS Web Cache can use the Oracle iStore 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 30-1 Oracle iStore Cookies for Welcome Bin Personalization

Cookie	Function
PersonName	Stores the user's first and last names
CartTotal	Stores the user's shopping cart amount

Oracle9iAS 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 Oracle9iAS 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 30.3.9, "Set Up Simple Personalization"](#).

If you are previewing the specialty store display of items and sections before publishing them, as described in [Section 18.1.2, "Using Preview Mode"](#), you should access the application server directly and not via Oracle9iAS Web Cache. This ensures that you are previewing the latest version of the pages.

Steps

1. In Oracle9iAS Web Cache Manager, choose **Session/Personalized Attribute Definition**, under **Administering Web Sites > Session Management**.

2. Select **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 30–2 Oracle9iAS Web Cache Session and Personalized Attribute Definitions

Session/Attribute	Cookie Name
UserNameCookie	PersonName
CartTotalCookie	CartTotal
ICXSession	The ICX 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/.
JTTSession	The JTT Session Cookie name is <Database ID>_<JTT Cookie property value>. You can set the property in Oracle Business Center.

Note: If you have already set up Oracle9iAS Web Cache with iStore 11.5.6, please remove the following personalized attribute definitions and the related caching rules: **SignInOutImageCookie** and **SignInOutUrlCookie**.

30.3.4 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 Oracle9iAS Web Cache Manager, choose **Session/Personalized Attribute Related Caching Rules**, under **Administering Web Sites > Session Management**.
2. Select **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 30–3 Oracle9iAS 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
ICXSession	Yes	Yes	No
JTTSession	No	Yes	No

Note: If you have already set up Oracle9iAS Web Cache with iStore 11.5.6, please remove the following personalized attribute definitions and the related caching rules: **SignInOutImageCookie** and **SignInOutUrlCookie**.

30.3.5 Create Cacheability Rules

Set up Oracle9iAS Web Cache to cache all Oracle iStore catalog pages, except ibeCCtpBuyRoute.jsp, for the HTTP methods GET, GET with query string, and POST with any parameters. The Oracle iStore 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. Oracle9iAS Web Cache can cache all other catalog route pages.

Additionally, you can set up Oracle9iAS 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 Oracle9iAS 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 30–4 Oracle9iAS 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.*	GET, GET with query string, POST	.*	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

30.3.6 Create Expiration Rules

When you change catalog content, Oracle9iAS Web Cache does not automatically invalidate cached pages. You must define expiration rules based on a time interval or invalidate cached pages manually in 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 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 Oracle9iAS 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 30–5 Oracle9iAS 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.*
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.*

30.3.7 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 cookie CombinedCookie.

Steps

1. In Oracle9iAS 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. Select **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.

30.3.8 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 and ICXSession to all cached JSPs. Do not bind them to other cached files, such as image files and scripts.

Steps

1. In Oracle9iAS Web Cache Manager, choose **Session/Personalized Attribute Related Caching Rules**, under **Administering Web Sites > Session Management**.
2. Select a session or attribute.
3. Select **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 30–6 Oracle9iAS Web Cache Session/Personalized Attribute Selector Associations

Session/Attribute	Selector Associations
UserNameCookie	/OA_HTML/ibeCCt.*\.*.jsp.*
CartTotalCookie	/OA_HTML/ibeCCt.*\.*.jsp.*
ICXSession	/OA_HTML/ibeCCt.*\.*.jsp.*
	/OA_HTML/jtfdload.jsp
JTTSession	/OA_HTML/ibeCCt.*\.*.jsp.*
	/OA_HTML/jtfdload.jsp

30.3.9 Set Up Simple Personalization

Use the following procedure to set up Simple Personalization.

Steps

1. In Oracle9iAS Web Cache Manager, choose **Simple Personalization**, under **Administering Web Sites > Cacheability Rules**.
2. Select Parse HREFs = **NO**.
3. Click **Change Selector Association**. The Change Policy-Selector Association window opens.
4. Make the selector association listed in the following table for simple personalization.
5. Select **Apply Changes** when finished.

Table 30–7 Oracle9iAS Web Cache Simple Personalization Selector Association

Selector	Parse HREFs
/OA_HTML/ibeCCt.*\,jsp.*	NO

30.3.10 Set Up Test Environment

You can validate cacheability rules by monitoring three log files:

- The Oracle9iAS Web Cache access log
- The Oracle9iAS Web Cache event log
- The application server’s access log

Set up the Oracle9iAS Web Cache event log in verbose mode using the following procedure.

Steps

1. In Oracle9iAS Web Cache Manager, choose **Administering Oracle Web Cache > Event Logging**.
2. Click **Edit** and check **YES** for **Verbose mode**.
3. Apply the change to Oracle9iAS Web Cache.

Integrating Oracle iStore with Oracle Workflow

This chapter describes the integration of Oracle iStore 11i with Oracle Workflow to provide e-mail notifications of Customer UI events and Store Administration business reports.

Main topics in this chapter include:

- [Overview of Oracle Workflow](#)
- [Oracle iStore Functionality with Oracle Workflow](#)
 - [Notifications Business Flow](#)
 - [Oracle iStore Seeded Notifications](#)
- [Setting up Oracle iStore to Use Oracle Workflow Notifications](#)
 - [Setting up Oracle iStore to Use Workflow Notifications - Required Steps](#)
 - [Setting up Oracle iStore to Use Workflow Notifications - Optional Steps](#)
- [Customizing Oracle iStore-Oracle Workflow Integration](#)

31.1 Overview of Oracle Workflow

Business processes today involve getting many types of information to multiple people according to rules that are constantly changing. An integral part of Oracle Applications, 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. Oracle Workflow does this by enabling e-mail notifications based on business event triggers.

For more information on Oracle Workflow, see *Oracle Workflow Guide* available on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

31.2 Oracle iStore Functionality with Oracle Workflow

Oracle iStore provides seeded workflows in which there are predefined notifications and notification messages. The **iStore Alert Workflow** (IBEALERT) contains the non-report-related notifications, while the report-related notifications belong to **iStore Alert Reports** (IBEECRRP).

The notification e-mail messages are sent to users based on various events, including:

- User registration
- Login assistance requested
- Orders placed or cancelled
- Shared shopping cart actions
- Sales assistance requested
- Contracts actions
- Business reports actions

Notifications can be triggered by a store user (e.g., registration) or by the application itself (e.g., when an update message is scheduled for delivery). The e-mail messages include attributes (also called *tokens*) 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 data tables.

You can choose to use only the seeded messages for notifications. You can also create new messages using Oracle Workflow Builder. See [Section 31.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#), for more information.

After you have the messages that you need, you can use the default configurations of ALL users, ALL stores, and ALL organization, or you can select messages for notification events based on store, organization, or user type combinations, using the Oracle iStore Store Administration UI. See [Section 31.3.2.3, "Mapping New Notification Configurations"](#) for details.

31.2.1 Notifications Business Flow

The business flow of a typical notification event is:

1. Notification event occurs. (e.g., a user registers or requests to share a cart).
2. Oracle iStore selects the message for the notification, in some cases based on the recipient's organization and user type. (These are configurable parameters -- see [Oracle iStore Notification Events Configurable Parameters](#) in [Section 31.3.2.3, "Mapping New Notification Configurations"](#), for details.)
3. Oracle Workflow parses the message.
4. Oracle Workflow enters dynamic content into e-mail.
5. Oracle Workflow sends the message to the e-mail address of the user(s) involved in the event.

Note: Users must have a valid e-mail address stored in their registration data for the e-mail notifications to reach them.

31.2.2 Oracle iStore Seeded Notifications

Oracle iStore comes with seeded (supplied) Oracle Workflow notification events and messages. These are:

31.2.2.1 Notification Events Related to Orders

- [Order Confirmation - Normal](#)
- [Order Confirmation - Next steps for faxed orders](#)
- [Orders Not Booked Notification](#)
- [Cancel Order](#)

31.2.2.2 Notification Events Related to Shopping Cart/Quote Sharing

- [Shared Cart Notification*](#)
- [Shared Quote Notification*](#)
- [Change Access Level by Cart Owner*](#)
- [Change Access Level by Quote Owner*](#)
- [Remove Cart Access by Recipient*](#)
- [Remove Quote Access by Recipient*](#)
- [Stop Sharing by Cart Owner*](#)
- [Stop Sharing by Quote Owner*](#)

* -- New in this release

31.2.2.3 Notification Events Related to Sales Assistance

- [Sales Assistance Request - To Sales Representatives](#)
- [Sales Assistance Request - To Users](#)

31.2.2.4 Notification Events Related to Users and Registration

- [User Registration](#)
- [Forget Login](#)

31.2.2.5 Notification Events Related to Contracts

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

31.2.2.6 Notification Events Related to Reports

- [Reports - iStore Historical Summary](#)
- [Reports - iStore Top Orders](#)

The following table, Oracle iStore Seeded Notification Events, describes all seeded Oracle iStore notification events. The table also lists their triggers and seeded recipients.

Table 31–1 Oracle iStore Seeded Notification Events

Notification Name	Description	Recipients	Trigger
Notification Events Related to Orders			
Order Confirmation - Normal	Confirms a normal order	User	User places an order in a web specialty store.
Order Confirmation - Next steps for faxed orders	Explains the remaining steps for order submission	User	User places an order and chooses to fax a credit card or purchase order as payment.

Table 31–1 Oracle iStore Seeded Notification Events (Cont.)

Notification Name	Description	Recipients	Trigger
Orders Not Booked Notification	Announces that an order has not been booked.	Order administrator (profile option IBE: Default Order Admin to Send Workflow Notification.)	User's order is not booked.
Cancel Order	Confirms cancelled order	User who cancels order	User cancels order using the web specialty store.
Notification Events Related to Shared Shopping Carts			
Shared Cart Notification*	Confirms shared cart event and explains how to access shared cart	Shared cart recipients (contains two messages -- one for B2B users, one for B2C users)	User submits a request to share a cart.
Shared Quote Notification*	Confirms shared quote event and explains how to access shared quote	Shared cart recipients (contains two messages -- one for B2B users, one for B2C users)	User submits a request to share a quote.
Change Access Level by Cart Owner*	Notifies users about access level changes	Shared cart recipients	Shared cart owner changes access level of recipient.
Change Access Level by Quote Owner*	Notifies users about access level changes	Shared quote recipients	Shared quote owner changes access level of recipient.
Remove Cart Access by Recipient*	Notifies users about shared cart status	Shared cart owner and recipients	Shared cart recipient removes his own access to a shared cart.
Remove Quote Access by Recipient*	Notifies users about shared quote status	Shared quote owner and recipients	Shared quote recipient removes his own access to a shared quote.
Stop Sharing by Cart Owner*	Notifies users that a shared cart has been un-shared by the owner	Shared cart recipients	Shared cart owner stops sharing a shared cart.
Stop Sharing by Quote Owner*	Notifies users that a shared quote has been un-shared by the owner	Shared quote recipients	Shared quote owner stops sharing a shared quote.
* = New in this release			
Notification Events Related to Sales Assistance			

Table 31–1 Oracle iStore Seeded Notification Events (Cont.)

Notification Name	Description	Recipients	Trigger
Sales Assistance Request - To Sales Representatives	Describes a request for sales assistance	For shopping carts: The sales representative specified in the profile option ASO: Default Salesrep . For published quotes: The sales representative who is the quote's primary sales agent.	User requests sales assistance.
Sales Assistance Request - To Users	Acknowledges a request for sales assistance	User	User requests sales assistance.
Notification Events Related to Users and Registration			
User Registration	Welcomes a newly registered user	User (contains two messages -- one for B2B users, one for B2C users)	User registers in a specialty store, or B2B user is registered by B2B Primary User.
Forget Login	Tells user his username and password	User	Registered user requests login information.
Notification Events Related to Contracts			
Contract Negotiations Request - Disapproval	Announces rejection of a contract terms change request	Contract sales representative for the user's operating unit	Contract administrator rejects user's request for changes in contract terms.
Contract Negotiations Request - To Sales Representatives	Describes a request for changes to contract terms	Contract sales representative for the user's operating unit	User requests changes in contract terms.
Contract Negotiations Request - Approval	Announces approval of a contract terms change request	User Contract sales representative for the user's operating unit	Contract administrator approves user's request for changes in contract terms.
Contract Negotiations Request - Cancellation	Announces cancellation of contract negotiations	User Contract sales representative for the user's operating unit	Contract administrator cancels contract that was created when a user requested changes in contract terms.

Table 31–1 Oracle iStore Seeded Notification Events (Cont.)

Notification Name	Description	Recipients	Trigger
Contract Negotiations Request - To Users	Acknowledges a request for changes to contract terms	User	User requests changes in contract terms.
Notification Events Related to Reports			
Reports - iStore Historical Summary	Contains the information from the Store Order Summary Data Out Bin	Users specified in the Store Administration UI under Reports > Email Preferences	iStore Reports concurrent programs refresh the report data.
Reports - iStore Top Orders	Contains daily Top Orders from the Top Orders Bin; does not show data for other time periods, such as week, month, etc.	Users specified in the Store Administration UI under Reports > Email Preferences	iStore Reports concurrent programs refresh the report data.

31.3 Setting up Oracle iStore to Use Oracle Workflow Notifications

This chapter is limited to information specific to implementing Oracle iStore's Oracle Workflow notification events. For further details, please refer to the *Oracle Workflow Guide* available on [Oracle Metalink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Limited information about customizing notifications is also presented here, in [Section 31.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#).

This section contains:

- [Section 31.3.1, "Setting up Oracle iStore to Use Workflow Notifications - Required Steps"](#)
- [Section 31.3.2, "Setting up Oracle iStore to Use Workflow Notifications - Optional Steps"](#)

31.3.1 Setting up Oracle iStore to Use Workflow Notifications - Required Steps

In addition to the Oracle-Workflow-specific setups documented in the *Oracle Workflow Guide*, the following is the only task required to activate the Oracle Workflow integration with Oracle iStore:

31.3.1.1 Activate iStore-Workflow Profile Option

The following Oracle iStore profile option is required to use Oracle Workflow notifications:

- **IBE: Use Workflow Features in iStore = Yes.**

Set this at the iStore application level.

31.3.2 Setting up Oracle iStore to Use Workflow Notifications - Optional Steps

The following are the optional steps to activate the Oracle Workflow integration with Oracle iStore:

- [Section 31.3.2.1, "Setting Default Administrator for Orders Errors"](#)
- [Section 31.3.2.2, "Setting up Sales Representative Recipients"](#)
- [Section 31.3.2.3, "Mapping New Notification Configurations"](#)
- [Section 31.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#)

31.3.2.1 Setting Default Administrator for Orders Errors

To specify a default username to receive a notification each time an error occurs during the ordering process, set the profile option:

- **IBE: Default Order Admin to Send Workflow Notification = <Oracle Workflow username>**

Set this to the Oracle Workflow username of the appropriate user at the application level for Oracle iStore.

31.3.2.2 Setting up Sales Representative Recipients

Several Oracle iStore notifications are sent to sales representatives and contract sales representatives. If you are integrating with the Oracle applications whose users are primarily sales representatives -- including Oracle Sales Contracts, Oracle Sales Online, and Oracle Quoting -- you must specify the sales representatives and contract sales representatives who receive notifications. Refer to the specific product documentation for further details.

31.3.2.3 Mapping New Notification Configurations

Oracle iStore ships with the seeded notification events described in [Section 31.2.2, "Oracle iStore Seeded Notifications"](#). For any notification event, if you have not set

up a message for a specific store, organization, or user type, Oracle iStore uses the default message, mapped to ALL stores, organizations, or user types.

As long as you have set the profile option, **IBE: Use Workflow Features in iStore**, to **Yes** at the application level, then the seeded notifications will be sent to users with valid e-mail addresses.

When mapping new configurations, three parameters can be used to determine the mapping:

- **Store** --- The list of values for Store includes all stores in your implementation.
- **Organization** --- The organization is determined by the setting of the profile option **MO: Operating Unit** at the responsibility level to a username. See [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#), for more information.
- **User type** -- The user type is determined during registration by the Oracle CRM Technology Foundation User Management Framework. Default values are: Individual User (B2C) and Business User (B2B).

The following table shows sample message configurations for the notification Order Confirmation - Normal.

Table 31–2 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

When Oracle iStore sends a notification, it chooses the message with the parameters that match the user's data most closely, or it selects the default configuration.

For example, with the message configuration listed in [Table 31–2, "Sample Configurations for the Notification Order Confirmation - Normal"](#), 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 31–2, "Sample Configurations for the Notification Order Confirmation -](#)

- Normal", a business user who places an order against Organization A receives Message 3, not Message 2.
- Organization, user type, and store are not relevant to certain notifications. In such cases:
- You cannot map notification configurations for organization or user type.
 - Pull-down menus from which you would normally choose organization or user type display as read-only fields.

Oracle iStore Notification Events Configurable Parameters

The following table, Configurable Parameters for Oracle iStore Notification Events, shows a list of notification events and their configurable parameters.

Table 31–3 Configurable Parameters for Oracle iStore Notification Events

Notification Event	Store	Org.	User Type
Cancel Order	No	Yes	Yes
Change Access Level by Cart Owner	Yes	Yes	Yes
Change Access Level by Quote Owner	Yes	Yes	Yes
Contract Negotiations Request - Approval	No	Yes	Yes
Contract Negotiations Request - Cancellation	No	Yes	Yes
Contract Negotiations Request - Disapproval	No	Yes	No
Contract Negotiations Request - To Sales Representatives	No	Yes	No
Contract Negotiations Request - To Users	No	Yes	Yes
Forget Login	Yes	Yes	Yes
Order Confirmation - Next steps for faxed orders	No	Yes	Yes
Order Confirmation - Normal	No	Yes	Yes
Orders Not Booked Notification	No	No	No
Remove Cart Access by Recipient	Yes	Yes	Yes
Remove Quote Access by Recipient	Yes	Yes	Yes
Reports - iStore Historical Summary	No	No	No

Table 31–3 Configurable Parameters for Oracle iStore Notification Events (Cont.)

Notification Event	Store	Org.	User Type
Reports - iStore Top Orders	No	No	No
Sales Assistance Request - To Sales Representatives	No	Yes	No
Sales Assistance Request - To Users	No	Yes	Yes
Share Cart Notification	Yes	Yes	Yes
Share Quote Notification	Yes	Yes	Yes
Stop Sharing by Cart Owner	Yes	Yes	Yes
Stop Sharing by Quote Owner	Yes	Yes	Yes
User Registration	No	Yes	Yes

31.3.2.4 Steps to Map New Configurations

Use the following procedure to add message configurations for notification events according to store, organization, or user type. For a list of seeded notification events, see [Section 31.2.2, "Oracle iStore Seeded Notifications"](#).

Prerequisites

- Perform the required tasks in [Section 31.3.1, "Setting up Oracle iStore to Use Workflow Notifications - Required Steps"](#).

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Log in to the Store Administration UI. In the **Advanced** tab, select the **Notifications** subtab. The **Notification Events** page opens with a list of existing Notification Events.
2. Select the **Details** icon for the notification event that you want to modify or copy. The **Notification Event Details** page opens, displaying the default, seeded configuration for this notification event and any other configurations that have been created.

- Optionally, you can **remove** a notification configuration: (1) Activate the **Select** checkbox of the appropriate configuration; and (2) press the **Delete** icon.
 - Optionally, you can disable/enable a configuration by selecting the notification configuration and selecting the **Enable** or **Disable** button.
 - You also can **update** Notification Configurations: (1) Activate the **Select** checkbox of the appropriate configuration; and (2) press the **Update** icon. In the **Update Configuration** page that appears, make your desired changes and then press **Apply** to save changes.
3. In the **Notification Event Details** page, select the **Add Notification Configuration** button. The **Add Configuration** page appears, with LOV menus for the following (the drop-list for these parameters will only be available if you can map the notification event at that level):
- **Organization** --- Select the organization to map the event to. You must have more than one organization set up to enable this feature. See [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#), for more information.
 - **User Type** --- Select the user type to map the event to. For information on user types, see [Section 12.1, "Overview of Oracle iStore Users"](#), and the user management section of the *Oracle CRM Technology Foundation User Guide*.
 - **Store** --- Select the store to which to map the event to.
4. Select **Apply** to save changes. If an identical configuration already exists, the application will return an error.

31.4 Customizing Oracle iStore-Oracle Workflow Integration

You can choose to use only the seeded messages for Oracle iStore notifications. If you want to create additional messages, you can use the planning steps below to assist you:

- 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.

If you are upgrading Oracle iStore and have customized Workflow messages, then you must do the following:

- Back up any necessary customized messages and remove the access locks from the messages and items of the Oracle iStore-related Oracle Workflow definition, so that the upgrade can overwrite the Oracle Workflow definition. See [Section 19.12, "Notifications Errors"](#) for details.

31.4.1 Creating Messages

Use Oracle Workflow Builder to create and edit messages for Oracle iStore notifications. The Oracle Workflow item type iStore Alerts Workflow (IBEALERT), in the data store file IBENOTIF.wft, contains all Oracle iStore 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 Historical 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 notification event. The following table lists the message prefix for each notification event. See [Section 31.2.2, "Oracle iStore Seeded Notifications"](#) for descriptions of the notification events.

Table 31–4 Seeded Message Template Names for Oracle iStore Notifications

Notification Event	Message Template Name
Cancel Order	CANCELORDER
Change Access Level by Cart Owner	CHANGEACCESSLEVEL
Change Access Level by Quote Owner	CHANGEACCESSLEVEL_QUOTE
Contract Negotiations Request - Approval	TERMAPPROVEDNOTIF
Contract Negotiations Request - Cancellation	TERMCANCELLEDNOTIF
Contract Negotiations Request - Disapproval	TERMREJECTEDNOTIF

Table 31–4 Seeded Message Template Names for Oracle iStore Notifications (Cont.)

Notification Event	Message Template Name
Contract Negotiations Request - To Sales Representatives	SALESQUOTENOTIFICATION
Contract Negotiations Request - To Users	CUSTQUOTENOTIFICATION
Forget Login	FORGETLOGINNOTIFICATION
Order Confirmation - Next steps for faxed orders	ORDFAXNOTIFICATION
Order Confirmation - Normal	ORDCONFNOTIFICATION
Orders Not Booked Notification	ORDNOTBOOKEDNOTIFICATION
Remove Cart Access by Recipient	ENDWORK
Remove Quote Access by Recipient	ENDWORK_QUOTE
Reports - iStore Historical Summary	IBE_ECR_SUMM_ALERT
Reports - iStore Top Orders	IBE_ECR_TOPORD_ALERT
Sales Assistance Request - To Sales Representatives	SALESASSISTNOTIFICATION
Sales Assistance Request - To Users	CUSTASSISTNOTIFICATION
Share Cart Notification	SHARECARTNOTIF
Share Quote Notification	SHAREQUOTENOTIF
Stop Sharing by Cart Owner	STOPWORKING
Stop Sharing by Quote Owner	STOPWORKING_QUOTE
User Registration	ACCTREGNOTIFICATION

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 31–5 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

Table 31–5 Attributes for the Item Type iStore Alerts Workflow (Cont.)

Display Name	Internal Name	Description	Type
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
Quote Detail with tax	QUOTEDETAILWITHTAX	Quote detail with tax information	Document
Quote detail without tax	QUOTEDETAILWOUTTAX	For quote line details with tax info	Document
Contract Number	CONTRACTNO	Contract number	Number
Order Detail	ORDERDETAIL	Order detail	Document
Order Detail without tax	ORDERDETAILWOUTTAX	Order detail without tax	Document
Order Detail with tax	ORDERDETAILWTAX	For order detail with line level tax info	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
Cart Version	QUOTEVER	Cart version/quote version	Number
URL	URL	URL (e.g., a shared cart link)	Text
Sharee Number	SHNUM	Shared cart recipient number	Text
Message Name	MESSAGE	Message name	Text

Table 31–5 Attributes for the Item Type iStore Alerts Workflow (Cont.)

Display Name	Internal Name	Description	Type
Requester Name	REQ_NAME	Requester name	Text
Requester First Name	REQ_F_NAME	Requester first name	Text
Requester Last Name	REQ_L_NAME	Requester last name	Text
Person Title	PERSON_TITLE	Person title	Text
Contact Phone	CONTACTPHONE	Contact phone	Text
Cart Name	CARTNAME	Cart name	Text
Cart Date	CARTDATE	Cart date	Text
Ship Method	SHIPMETHOD	Ship method	Text
Ship-to Name	SHIPTONAME	Ship-to name	Text
Ship-to Address	SHIPTOADDRESS	Ship-to address	Text
Specialty Store Name	MSITENAME	Specialty store name	Text
Reason	REASON	Reason code for sales assistance request	Text
Order Number	ORDERNUMBER	Order number	Text
Contact Name	CONTACTNAME	Contact name	Text
Context Message	CONTEXT_MESSAGE	Context Message	Text
Access Level	ACCESSLEVEL	Access Level	Text
Old Access Level	OLDACCESSLEVEL	Old Access Level	Text
Update Message	UPDATEMSG	Update Message	Text
Retrieve Message	RETRIEVEMSG	Retrieve Message	Text

The item type iStore Alert Reports has a different set of attributes, listed in the following table.

Table 31–6 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

Table 31–6 Attributes for the Item Type iStore Alert Reports (Cont.)

Display Name	Internal Name	Description	Type
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
Table of Contents	TOC	Table Of Contents	Document
Request Server	REQ_SERVER	Request Server URL	Document
Style Sheet	STYLE_SHEET	Style Sheet for Alert Reports	Document
Day Reports	REPORT_DAY_BODY	Day Reports	Document
iStore Shopping Cart Summary	IBE_ECR_BIN_SUMM_CARTS	iStore Shopping Cart Summary	Document
Global Week Detail Reports	REPORT_WEEK_BODY	Global WeekDetail Reports	Document
Global Month Detail Reports	REPORT_MONTH_BODY	Global Month Detail Reports	Document
Global Quarter Detail Reports	REPORT_QUARTER_BODY	Global Quarter Detail Reports	Document
Global Year Detail Reports	REPORT_YEAR_BODY	Global Year Detail Reports	Document

Use the following procedure to create customized Oracle Workflow messages for the Oracle iStore 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 31–4, "Seeded Message Template Names for Oracle iStore 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 31.3.2.3, "Mapping New Notification Configurations"](#) for more information.

See *Oracle Workflow Guide* for more information on working with messages.

Part VI

Appendices

This section contains informational appendices related to Oracle iStore. This part contains the following:

- [Appendix A, "Profile Options"](#)
- [Appendix B, "Concurrent Programs"](#)
- [Appendix C, "Seeded Responsibilities"](#)
- [Appendix D, "Advanced Display"](#)
- [Appendix E, "Display Templates and Media Objects"](#)
- [Appendix F, "Customer UI Process Flows"](#)
- [Appendix G, "Decommissioning Self-Service UI"](#)

Profile Options

This chapter describes profile option settings that are required for successful implementation and administration of Oracle iStore 11*i*.

Main topics in this chapter include:

- [Before You Begin](#)
- [How to Set Profile Options](#)
- [Oracle CRM Technology Foundation Profile Options](#)
- [Concurrent Program Manager Profile Options](#)
- [Store Administration UI Setup Profile Options](#)
- [User Management Profile Options](#)
- [Customer UI Mandatory Setup Profile Options](#)
- [Multiple Organization Profile Options](#)
- [Customer UI Initial Pages Profile Options](#)
- [Customer UI Pricing Profile Options](#)
- [Customer UI Shopping Cart and Checkout Profile Options](#)
- [Customer UI Section and Item Display Profile Options](#)
- [Customer UI Product Search Profile Options](#)
- [Customer Assistance Profile Options](#)
- [Reports Profile Options](#)
- [Lead Import Profile Options](#)
- [Oracle Workflow \(Notifications\) Integration Profile Options](#)

- [Caching and SSL Profile Options](#)
- [Miscellaneous Customer UI Profile Options](#)
- [Oracle Order Capture/Oracle Quoting Integration Profile Options](#)
- [Oracle Configurator/Bills of Material Integration Profile Options](#)
- [Oracle Sales Contracts Integration Profile Options](#)
- [Oracle Content Manager Integration Profile Options](#)
- [Oracle Marketing Integration Profile Options](#)
- [Non-Supported 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>/APPS password> start`.

A.2 How to Set Profile Options

Use the following procedure to set any profile option.

Note: As a best practice, use the highest level setting for profile options, when possible. For example, if a profile option can be set at site, application and responsibility levels, you should set it at the highest level that your business needs can tolerate.

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** (highest level)
- **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.
 7. Bounce the Apache server after making profile option changes.

See *Oracle Applications System Administrator's Guide* for more information.

A.2.1 Finding Application and Responsibility ID Values

You must know the APPLICATION_ID values and RESPONSIBILITY_ID values for store administrator (manager) and customer responsibilities before you can set the required Oracle CRM Technology Foundation (JTT) profile options for users with these responsibilities. The following table, Application and Responsibility IDs for Seeded iStore Administrator and Customer Responsibilities, shows the values.

Table A–1 Application and Responsibility IDs for Seeded iStore Administrator and Customer Responsibilities

Responsibility	Application ID	Responsibility ID
iStore Administrator	671 (iStore)	21819
IBE_CUSTOMER	671 (iStore)	22372

If you need to find additional application or responsibility ID numbers for a responsibility, use the following procedure:

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.

See *Oracle Applications System Administrator's Guide* for more information.

A.3 Oracle CRM Technology Foundation Profile Options

This section summarizes the Oracle CRM Technology Foundation profile options that you need to set when implementing Oracle iStore.

Note: The product code for the Oracle CRM Technology Foundation is JTT. Previously it was JTF, and the application retains the JTF code for its profile options.

This section includes:

- [Section A.3.1, "Foundation Profile Options for Store Administration UI Setup"](#)
- [Section A.3.2, "Foundation Profile Options for Store Administrator \(Manager\) User Accounts"](#)
- [Section A.3.3, "Foundation Profile Options for the Guest User Account"](#)

A.3.1 Foundation Profile Options for Store Administration UI Setup

Set the profile options in this section at the following levels:

- **Site**
- **Application**—iStore

For more information, see:

- [Section 4.1.1, "Set Initial Profile Options"](#)

The following table lists the JTF profile options that must be set to enable the Store Administration UI.

Table A–2 Foundation Profile Options for Store Administration UI Setup

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 Store Administration 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 for U.S. Dollars	Default currency. Enter the currency code in all uppercase letters.
JTF_PROFILE_DEFAULT_NUM_ROWS	10	Default number of rows to display in tables
JTF_PROFILE_DEFAULT_RESPONSIBILITY (application level only)	21819	Default responsibility ID (21819=iStore Administrator)

A.3.2 Foundation Profile Options for Store Administrator (Manager) User Accounts

Set the profile options in this section at the following levels:

- **User**—Store administrator/manager user name

For more information, see:

- [Section 4.1.2, "Set up Administrators"](#)

The following table lists the JTF profile options that must be set for the iStore merchant administrator/manager account.

Table A–3 Foundation Profile Options for Store Manager User Accounts

Profile Option Name	Value	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=iStore Administrator)

To find the Responsibility_ID of the Store Manager responsibility, see [Section A.2.1, "Finding Application and Responsibility ID Values"](#)

A.3.3 Foundation Profile Options for the Guest User Account

Set the profile options in this section at the following levels:

- **User**—The guest user name

For more information, see:

- [Section 4.3.1, "Set up Guest User Access"](#)

The following table lists the JTF profile options that must be set for the guest user account.

Table A–4 Foundation Profile Options for Guest User Account

Profile Option Name	Value	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)

To find the Application_ID and Responsibility_ID of the Guest User responsibility, see [Section A.2.1, "Finding Application and Responsibility ID Values"](#)

A.4 Concurrent Program Manager Profile Options

Set the profile options in this section at the following levels:

- **Responsibility**—iStore Concurrent Programs Responsibility and any other Oracle iStore concurrent program manager responsibility

The following table describes the profile option values for the concurrent program manager.

Table 31–7 Profile Options for the Concurrent Program Manager

Profile Option Name	Value
ASO: Default Order Type	Mixed
ASO: Default Salesrep	No Sales Credit
ASO: Validate Salesrep	No

Table 31–7 Profile Options for the Concurrent Program Manager (Cont.)

Profile Option Name	Value
Generally, set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.	

A.5 Store Administration UI Setup Profile Options

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**—iStore Administrator or another store manager responsibility
- **User**—Store manager user name

The following table describes the IBE profile options for Store Administration UI setup.

Table A–5 Store Administration UI Setup Profile Options

Profile Option Name	Req?	Description/Additional Information
IBE: Category Set	Yes	Used in: (1) category-based product search in Store Administration UI; (2) determining the default item display style if no item-level display is mapped in Customer UI; and (3) defining product relationship rules between category to product, category to section, or category to category. Set to the primary display category set. See Section 6.3.2, "Inventory Categories and the iStore Product Catalog" .
IBE: Item Validation Organization	Yes	Specifies the Inventory Organization where your stores' products reside. See Section 6.1, "Products in Oracle iStore Overview" . Recommended value: Master Inventory Organization, unless you are implementing multiple organizations. In that case, see: Section 16.3, "Implementing Globalization with Oracle iStore" .
AMS: Item Validation Inventory Organization	No	If integrating with Oracle Marketing, set this profile option at site level to the same Inventory Organization as specified in the profile option, IBE: Item Validation Organization . Normally, this will be the Master Organization. See Section 25.4, "Implementing Oracle Marketing Products Integration" , for more information.

Table A–5 Store Administration UI Setup Profile Options

Profile Option Name	Req?	Description/Additional Information
IBE: Enable Display Style	No	Specifies whether Display Styles functionality shows up in the Store Administration UI. If set to Yes , Display Styles can be selected in the Display Templates pages for Products and Sections; also, new Display Styles can be created in the Template Manager subtab within the Advanced tab. If set to No , the functionality is not available. Default value = Null. Null is treated as No.
IBE: Use Database for Media Storage (Site level)	No	Enables/disables specific file upload functionality in the Content tab of the Store Administration UI. Yes = Upload functionality available. No = Upload Functionality not available. Default value = No. See Section 8.6.2, "Understanding IBE: Use Database for Media Storage" .
IBE: Use Display Order Feature	No	Specifies whether you can manually order the display of specialty stores across all stores in the Stores: Display Order page. If set to Yes , you can order the display manually. If set to No , specialty stores will be arranged in case-insensitive, alphabetical order at runtime in the Customer UI. Default value = Yes.

A.6 User Management Profile Options

This section lists the profile options that control user management aspects of your implementation.

Set the profile options in this section at the following levels:

- **Application**—iStore

For more information, see:

- [Chapter 12, "Implementing Users and Registration"](#)

Note: This section does not contain profile options for store administrator/manager, concurrent program manager, or guest user accounts. Those profile options can be found in:

- [Section A.3.2, "Foundation Profile Options for Store Administrator \(Manager\) User Accounts"](#)
- [Section A.3.3, "Foundation Profile Options for the Guest User Account"](#)
- [Section A.4, "Concurrent Program Manager Profile Options"](#)

The table below describes iStore user management profile options.

Table A–6 User Management Profile Options

Profile Option Name	Req?	Description/Additional Information
IBE: Use Auth Permissions in Order Tracker	No	Specifies if permission checking is enforced for users to view only the orders placed by themselves or all of their organization's orders in Order Tracker in the Customer UI. If set to Yes , iStore checks if the user has the following permissions in his user role, and if he doesn't, he is not allowed to view the organization orders: IBE_VIEW_INVOICE, IBE_VIEW_ORDER, IBE_VIEW_PAYMENT. Default = No.
IBE: Use Business to Customer Features	No	Enables the ability of B2C users to register in the web stores. Yes = B2C user registration supported and users approved automatically; No = B2C users cannot register. Default = Yes.
IBE: Use Business User Auto Approval	No	Controls whether B2B users are automatically approved. Yes = B2B users approved automatically; No = B2B users require approval. Default = Yes. If set to Yes , the Organization Number textbox <i>does not appear</i> in the registration page, meaning you will not be able to register using the "existing organization" functionality. Note: This profile option setting overrides any B2B approval settings you have defined in the CRM (JTT/JTF) User Management pages.
IBE: Use B2B Features	No	Specifies whether B2B users are supported in your stores. Yes = B2B users supported; No = No support for B2B users. Default = Yes.

A.7 Customer UI Mandatory Setup Profile Options

Set the following **mandatory** IBE profile options in order to configure the Customer UI. Set the profile options in this section at the following levels:

- **Application**—iStore

Important: You must set these profile options for orders to be submitted properly.

See also: [Section 4.3.3.1, "Mandatory iStore Customer UI Profile Options"](#), [Section 4.3.3.2, "Mandatory Oracle Quoting/Order Capture \(ASO\) Profile Options"](#), and [Section A.20, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#).

The following table describes mandatory the profile options for Customer UI setup.

Table A–7 Mandatory Customer UI Profile Options

Profile Option Name	Description
IBE: Authorize Payment Offline During Normal Checkout	Note: The only supported value for this profile option is Yes. For more information on this profile option, see Section 4.3.3.1, "Mandatory iStore Customer UI Profile Options" , and Section A.11, "Customer UI Shopping Cart and Checkout Profile Options" .
IBE: Category Set	See Store Administration UI Setup Profile Options above for instructions on how to set this profile option.
IBE: Create Order in Entered State, if it has errors while booking	Set to Yes . This profile option specifies if the order should be created in the Entered state even if there are errors while booking it. Default = No.
IBE: Default Payment Term	Set to the payment term that will be the default payment term for orders. Payment terms are set in Oracle Receivables. See <i>Oracle Receivables User Guide</i> for more information.
IBE: Pricing Event--Before Shopping Cart	Set to Enter Order Line . Specifies the user-defined pricing event (defined in Pricing) for the catalog stage.
IBE: Pricing Event for Shopping Cart	Set 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.
IBE: Recalculate Price in Order Management	Ensure a setting of No . Default = No. Recommended value = No. For more information, see Section 4.3.3.1, "Mandatory iStore Customer UI Profile Options" .
ASO: Credit Card Authorization	Set this to Yes or No , to enable/disable online credit card authorization. The default value is Null. If Null, a value of No is assumed.
ASO: Default Quote Status	Set to Store Draft . Determines the default quote status of an iStore shopping cart.
ASO: Default Order State	Set to Booked . Possible values: Booked/Entered.
ASO: Default Order Type	Set to Mixed . Determines how an order is processed in Order Management.
ASO: Default Salesrep	Set to No Sales Credit or <sales representative name> . Determines default contact for Sales Assistance. Can also be set at site, responsibility, and user levels.

Table A–7 Mandatory Customer UI Profile Options

Profile Option Name	Description
ASO: Enable TCA Changes	Set to Yes . Required for address validation in TCA.
ASO: OM Defaulting	Set to Yes or No according to business need. Determines whether OM uses default values for certain cart attributes if null values are passed. Yes = OM uses default values for attributes; No = OM default values are not used. See: Section 2.11, "Setting up Oracle Order Management"
Sequential Numbering (Site Level)	Set to Always Used . Necessary for iStore orders process. (The name of this profile option has no product code prefix.)

A.8 Multiple Organization Profile Options

Set the profile option in this section at the following level:

- **Responsibility**—IBE_CUSTOMER and any other Oracle iStore customer user responsibility

For more information, see:

- [Chapter 16, "Implementing Globalization and Multiple Organization Architecture"](#)

The following table describes the multi-org profile option.

Table A–8 Multiple Organization Profile Options

Profile Option Name	Value	Description
MO: Operating Unit	Operating unit	This profile specifies the operating unit against which Customer UI users place orders. The user can only view and purchase items that are in the Inventory Organization associated with this operating unit.

Note: If you are implementing multi-org, set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.

A.9 Customer UI Initial Pages Profile Options

Profile options in this section control the behavior of:

- Initial landing pages

Set the profile options in this section at the following levels:

- **Application**—iStore

For additional information, see:

- [Chapter 5, "Implementing Initial Customer UI Pages"](#)

The following table lists profile options that control the behavior of the initial (landing) pages of the Customer UI.

Table A–9 Profile Options for Customer UI Initial Pages

Profile Option Name	Default Value	Description
IBE: Default Specialty Store	null	Specifies the default specialty store, and is used to route Customer UI users directly to Store Home Page. Value = Store/Minisite ID .
IBE: Display Language List in Specialty Store Page	No	Enables Language List in Specialty Store Page and Store Home Page. Possible values = Yes/No.
IBE: Maximum Columns in Specialty Store Page	0	Specifies number of columns in Specialty Store Page. Possible values = any integer.
IBE: Show Change Store Link	Yes	Enables Change Store link (link to Specialty Store Page) in Global Bin. Possible values = Yes/No.
IBE: Use Global Bin	Yes	Specifies whether the global bin is displayed on section pages in its default location. Possible values = Yes/No.
IBE: Use Section Bin	Yes	Specifies whether the Browse Bin is displayed on section pages in its default location. Possible values = Yes/No.
IBE: Use Specialty Store Page	Yes	Enables display of Specialty Store Page as default landing page in Customer UI. Possible values = Yes/No.
IBE: Use Specialty Store Picker	No	Enables Store Picker display on Store Home Page. Possible values = Yes/No.
IBE: Use Welcome Bin	Yes	Enables Welcome Bin on section pages. Possible values = Yes/No.

A.10 Customer UI Pricing Profile Options

Profile options in this section control the behavior of:

- Pricing behavior in Customer UI

Set the profile options in this section at the following levels:

- **Application**—iStore

All of these profile options are optional; however, their settings are important for pricing parameters. For additional information, see:

- [Chapter 9, "Implementing Pricing"](#)

The following table lists the iStore pricing profile options.

Table A-10 Profile Options for Customer UI Pricing

Profile Option Name	Description
IBE: Retrieve all Units of Measure for an Item	Set to Yes or No according to business need. Specifies if all UOMs for an item are retrieved with prices or only primary UOM with prices. Yes = All UOMs retrieved; No = Primary UOM retrieved. Default = No.
IBE: Use Line Agreements	Specifies whether B2B users with the permission IBE_USE_PRICING_AGREEMENT can select pricing agreements at line level, in addition to the header-level agreement selection enabled by the permission. Default = No.
IBE: Use Price List Associated with Specialty Store	Set to Yes or No according to business need. Specifies where to retrieve price lists. Yes = OM Basic Pricing; No = Oracle Advanced Pricing. Note: Guest (walk-in user) user price lists are always determined by the price list selected for Walk-in Users in the Store Administration UI.

A.11 Customer UI Shopping Cart and Checkout Profile Options

Profile options in this section control the behavior of:

- Shopping cart behavior in Customer UI
- Checkout page behavior in Customer UI

Set the profile options in this section at the following level, unless indicated otherwise in the table:

- **Application**—iStore

All of these profile options are optional; however, their settings are important for shopping cart and checkout behavior. For additional information, see:

- [Chapter 9, "Implementing Pricing"](#)
- [Chapter 10, "Implementing Payment Types and Shipping Methods"](#)
- [Chapter 11, "Implementing Carts and Orders"](#)

Table A–11 Profile Options for Customer UI Shopping Cart and Checkout Pages

Profile Option Name	Description
Cart Expiration Profile Options	
IBE: Active Cart Expiration Duration (# days)	Specifies number of days that user can access active shopping cart before it expires; expiration date calculated from the last update date of the cart. Set to an integer. Default = 30.
IBE: Saved Cart Expiration Duration (# days)	Specifies the number of days that a user can access a saved shopping cart before it expires. The expiration date is calculated from the last update date of the cart. Default value = 90.
Miscellaneous Cart/Checkout Profile Options	
IBE: Mandate Contacts For Billing and Shipping	Specifies whether B2B users must enter contact information before order submission. Yes = User must enter information; No = Optional for user. Default value = No.
IBE: Merge Shopping Cart Lines	Specifies whether to merge item lines in the shopping cart if the same item is added to the cart more than once. Yes = Lines are merged if duplicate; No = No line merging. Default = No. If set to Yes, set IBE: Use Line Level Shipping to No.
IBE: Use Direct Item Entry	Specifies whether customer-to-merchant part number mapping is available. Default value = Yes.
IBE: Use Promotion Code	Enables/disables appearance of the Promotion Codes link in shopping cart. Set to Yes to enable the link and its related functionality, or to No to disable. Default value at iStore application level is Yes. Null also is treated as Yes. Also can be set at responsibility level to the iStore customer responsibility of your choice.
IBE: Use Sensitive Pages	A sensitive page is a page that displays personal user-specific information. In Oracle iStore, the checkout and account pages are sensitive. Catalog (sections and products), shopping cart, and Order Tracker pages are not sensitive. 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. Default value = Yes.
IBE: Use Shopping Lists	Specifies whether shopping list functionality is available to customers. Default value = Yes.
IBE: Use Support	Determines whether users can choose service items for serviceable items that are in their carts. If the profile option is set to Yes , a pull-down menu of service items appears in the shopping cart. If the profile option is set to No , users cannot purchase service items. Default value = No.
IBE: Use Support Cart Level	This profile option is currently not in use. Set to No . Default value = No.

Table A–11 Profile Options for Customer UI Shopping Cart and Checkout Pages

Profile Option Name	Description
Contracts and Quoting Integration Profile Options	
IBE: Enforce “Terms and Conditions” Review by User	Specifies whether customer must view the terms and conditions before submitting cart as order. Default value = No. Only set if ASO: Enable Use Contracts = Yes.
IBE: Reject Terms and Conditions Flow	Specifies whether contract negotiation in the stores takes place through the Oracle iStore-Oracle Sales Contracts process flow or the Oracle Quoting-Oracle Sales Contracts process flow. Set to CONTRACTS to use the Oracle iStore-Oracle Sales Contracts process flow, or to QUOTING to use the Oracle Quoting-Oracle Sales Contracts process flow. Default = CONTRACTS. Set only if the profile option ASO: Enable Use Contracts = Yes. See Also: Section A.20, "Oracle Order Capture/Oracle Quoting Integration Profile Options" and Section A.22, "Oracle Sales Contracts Integration Profile Options"
Payment Profile Options	
IBE: Authorize Payment Offline During Normal Checkout	Specifies if payment authorization offline before checkout is allowed. Yes = Offline authorization enabled; No = only online authorization allowed. Default = Yes. Note: The only supported value for this profile option is Yes. Use the ASO: Credit Card Authorization profile option to enable/disable online credit card authorization in the stores.
IBE: Use Commitments	Specifies whether customers can use commitments at checkout. Defaults value = No. If set to Yes, set IBE: Authorize Payment Offline During Normal Checkout to Yes, since online credit card authorization is not possible with commitments.
Cart Sharing Profile Options	
IBE: Use Sharecart Functionality	Specifies whether Cart Sharing is enabled in the Customer UI. Default value = No . Set at IBE_CUSTOMER responsibility level. Also can be set at application and site levels.
IBE: Cart Retrieval By Number For B2B	For B2B users, this profile option enables a textbox (labelled Cart Retrieval Number) in the My Carts page. This is for shared cart backward compatibility purposes. Set at IBE_CUSTOMER responsibility level. Also can be set at application and site levels. Default value = No . Also can be set at site and application levels.
Shipping Profile Options	
IBE: Preferred Shipping Method	Specifies preferred shipping method . Set at responsibility or user level.

Table A–11 Profile Options for Customer UI Shopping Cart and Checkout Pages

Profile Option Name	Description
IBE: Use Line Level Shipping	Specifies whether user can enter line level shipping information in shipping information page. Default value = Yes. If set to Yes , set IBE: Merge Shopping Cart Lines to No, as you cannot enable shopping cart line merging and line splitting simultaneously.
IBE: Use Shipping Instructions	Specifies whether user can enter shipping instructions in shipping information page. Default value = Yes.
Express Checkout Profile Options	
IBE: Use Express Checkout	Specifies whether Express Checkout is enabled. Default value = Yes.
IBE: Express Checkout Consolidation Time Interval	Specifies the time interval (minutes) in which Express Checkout cart is available to be added to before being submitted by concurrent program. Default value = 60. For example, if the time is set to 60 minues, and the concurrent program runs every 45 minutes, a quote will be submitted on the second run of the concurrent program; but if the concurrent program is set to run every 120 minutes, it will be submitted on the first run.
Post Sales Profile Options	
IBE: Enable Invoices in Order Tracker	Specifies whether the Invoices link is displayed in the third level menu of Order Tracker. Default value = Yes.
IBE: Enable Order Cancellation in Order Tracker	Specifies whether registered users (B2B and B2C) can cancel their orders in Order Tracker. Default value = No (application level only, no default value at responsibility level.) Can be set at application and responsibility levels.
IBE: Enable Payments in Order Tracker	Specifies whether the Payments link is displayed in the third level menu of Order Tracker. Default = Yes.
IBE: Number of Invoice/Order Lines displayed	Specifies the number of tables rows to display when users view invoice, order, and payment data in Order Tracker. Default = 10.
IBE: Use Auth Permissions in Order Tracker	Specifies if permission checking is enforced for users to view only the orders placed by themselves or all of their organization’s orders in Order Tracker in the Customer UI, and while viewing down into order details in some reporting bins in the Store Administration UI. If set to Yes , iStore checks if the user has the following permissions in his user role, and if he doesn’t, he is not allowed to view the organization orders: IBE_VIEW_INVOICE, IBE_VIEW_ORDER, IBE_VIEW_PAYMENT. Default = No.

A.12 Customer UI Section and Item Display Profile Options

Profile options in this section control the behavior of:

- Section Display
- Items (products) display within sections

Set the profile options in this section at the following levels:

- **Application**—iStore

All of these profile options are optional. For additional information, see:

- [Chapter 7, "Implementing Customer UI Catalog"](#)

Table A–12 Profile Options for Section and Item Display in Customer UI

Profile Option Name	Description
IBE: Items Per Page for Display	Specifies number of items to display in leaf sections of the hierarchy (the ending sections of a node). Set to an integer. The default value is 20.
IBE: Items Per Section for Display	Specifies the maximum number of items (products) to display per section. If no value is set, all items in a section will display. Set to an integer. The default value is Null. If no value is set, all items in a section will display.
IBE: Lines Per Section for Multiple Section Display	Specifies the number of items to display per section when multiple sections display on page. Set to an integer. The default value is Null. If no value is set, IBE: Items Per Page for Display is used.
IBE: Number of Menu Subtabs	Specifies the number of menu subtabs. Set to an integer. Default value = 5.
IBE: Number of Menu Tabs	Specifies the number of menu tabs. Set to an integer. Default value = 5.
IBE: Sections Per Page for Display	Specifies the total number of sections to display 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. Set to an integer. If no value is set, the number of sections per page is not limited. Default = Null.
IBE: Use Add Item Bin	Specifies whether the Add Item bin is displayed on product pages in its default location; this bin contains an Add to Cart button. Possible values = Yes/No. Default value = Yes.
IBE: Use Catalog Exclusions	Specifies whether the exclude sections from stores functionality works. Yes = sections excluded in the Update Section: Stores page will not show up in Customer UI. No = Any sections excluded in the Update Section: Stores page will still show up in Customer UI. If section exclusions are never specified for a store, then set to No to improve performance. Default value = Null, which is treated as No. See Section 7.4.4, "Assigning Sections to Stores" , for more information.

Table A–12 Profile Options for Section and Item Display in Customer UI

Profile Option Name	Description
IBE: Use Logical Media for Images	Set to Yes if you are using customized menu images. Yes = DisplayManager uses logical media for menu images. No = Disables logical media retrieval for menu images and uses default menu images. Default = No.
IBE: Use Section Bin	Specifies whether the Browse Bin is displayed on section pages in its default location. Possible values = Yes/No. Default value = Yes.
IBE: Use Section Path	Specifies whether the section path is displayed on section and item pages in its default location. Possible values = Yes/No. Default value = Yes.
IBE: Use Web Placements	Specifies whether out-of-the-box eMerchandising postings from Oracle Marketing can display on Oracle iStore web store pages. Yes enables eMerchandising postings. No disables eMerchandising postings, but users can still use the bins to display content. Default value = No.

A.13 Customer UI Product Search Profile Options

Profile options in this section control the behavior of:

- Product search behavior in Customer UI

Set the profile options in this section at the following levels:

- **Application**—iStore

All of these profile options are optional; however, their settings are important if you are enabling the Customer UI Search utility. For additional information, see:

- [Section 6.8, "Setting up Product Search for the Customer UI"](#)

The following table lists product search profile options for the Customer UI.

Table A–13 Profile Options for Customer UI Product Search

Profile Option Name	Description
IBE: Enable Fuzzy Search	Enables “fuzzy” product searches. Possible values = Yes/No. Default value = No.
IBE: No of Results in Search	Sets the maximum number of results returned. Set to an integer. Default = 200.
IBE: Search Lines Per Page	Sets the number of lines to be displayed per page. Set to an integer. Default = 20.

Table A–13 Profile Options for Customer UI Product Search

Profile Option Name	Description
IBE: Use Category Search	Determines whether search menu in the Customer UI restricts searches to category- or section-level searching. Yes = Categories with publishable items will be searched. No = Store's top level sections will be searched. Null = Enables basic search against all products in the current store.
IBE: Use Synonym Search	Determines whether the product search retrieves product names that are synonyms of the users' search keywords. Yes = Synonym search enabled (after you load a thesaurus). No = Synonym search disabled. Default = No
IBE: Thesaurus File Name	Specifies the prefix for the thesaurus names of the synonym files that you load for the Oracle iStore product synonym search. Default = IBETHESAURUS

A.14 Customer Assistance Profile Options

Profile options in this section control the behavior of:

- Customer assistance and support-related features

All of these profile options are optional. For additional information, see:

- [Chapter 13, "Implementing Customer Assistance"](#)

Table A–14 Profile Options for Customer Assistance Features

Profile Option Name	Description
IBE: Use Call Me Back	Specifies whether the callback feature is enabled. Default = No.
IBE: Use Sales Assistance Feature	This profile option specifies whether Sales Assistance is enabled. Default = Yes.

A.15 Reports Profile Options

Set the profile options in this section at the following levels:

- **Application**—iStore

For more information, see

- [Chapter 15, "Implementing Reports"](#)

The following table describes the iStore Reports profile options.

Table A-15 Profile Options for iStore Reports

Profile Option Name	Req?	Description
IBE: Currency Code	Yes	This profile option specifies the currency code used in iStore Reports.
IBE: Enable Force Refresh	No	Specifies whether to populate the iStore 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. Default value = Yes.
IBE: Enable Parallel Data Extraction for Reporting	No	Specifies whether parallelism is enabled when running the data refresh concurrent programs for iStore Reports. Yes enables parallelism. No disables parallelism. Default value = No.
IBE: GL Conversion Type	Yes	Specifies the GL currency conversion type for iStore Reports. The GL currency conversion type provides the information necessary to convert transaction amount data from the original currencies to the currency required by iStore 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 iStore Reports period.
IBE: GL Period Set Name	Yes	Specifies the GL period set used by the iStore Reports. Set the profile option to the calendar that you want the iStore Reports to use. This calendar must use the Oracle General Ledger standard period types: Day, Month, Quarter, and Year. The Oracle General Ledger time periods in the calendar must be non-adjusting periods.
IBE: iStore Materialized Views Usage	No	Controls whether the database engine reroutes iStore 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 . Default = Yes.

Table A–15 Profile Options for iStore Reports

Profile Option Name	Req?	Description
IBE: Quarter Begin Data	No	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. Default value = Yes. The value of the profile option is irrelevant if the profile option IBE: YTD Data Availability in Bins is set to Yes.
IBE: Truncate Records	No	Specifies whether records are deleted or truncated in the iStore Reports fact tables. Yes truncates the records, resulting in faster performance. Default value = Yes.
IBE: YTD Data Availability in Bins	No	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. Default value = Yes. If set to Yes, IBE: Quarter Begin Data is irrelevant.

A.16 Lead Import Profile Options

Set the profile options in this section at the following levels:

- **Application**—iStore

For more information, see:

- [Chapter 27, "Integrating Oracle iStore with Oracle Sales Applications"](#)

The following table describes the IBE profile options for Lead Import functionality.

Table A–16 Profile Options for iStore Lead Import

Profile Option Name	Req?	Description
IBE: Order Lead Import Interval (In Days)	No	Determines the number of days between retrieval of order lead data. Default value = 1.
IBE: Quote Lead Import Interval (In Days)	No	Determines the number of days between retrieval of quotes lead data. Default value = 1.
IBE: Email Address For Lead Import Status	No	Enter the e-mail address of the person to whom the lead import program status will be sent. Use the format: john.doe@company.com. Separate multiple entries with a single space or comma. Default value = null.

A.17 Oracle Workflow (Notifications) Integration Profile Options

This section contains profile options which enable the integration with Oracle Workflow to provide e-mail notification messages of user events.

Set the profile options in this section at the following levels:

- **Application**—iStore

For more information, see:

- [Chapter 31, "Integrating Oracle iStore with Oracle Workflow"](#)

The following table describes the iStore profile options for notifications.

Table A-17 Profile Options for iStore Notifications

Profile Option Name	Req?	Description
IBE: Default Order Admin to Send Workflow Notification	No	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	Specifies the e-mail address that receives diagnostic messages when there is an Oracle iStore application error in the Customer UI, such as an exception. Oracle iStore sends the exception message and application context to this e-mail address. The recipient can use the information to troubleshoot Oracle iStore.
IBE: Notification User Role	No	Specifies the user responsibility for setting notifications. Recommended value: <code>System Administrator</code>
IBE: Use Workflow Features in iStore	No	Specifies whether Oracle Workflow features are available in your instance. Default value = Yes.

A.18 Caching and SSL Profile Options

Set the profile options in this section at the following levels:

- **Application**—iStore

Set to Site level if descriptions state that you can.

For more information, see:

- [Chapter 17, "Implementing Performance and SSL"](#)
- [Chapter 30, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#)

The following table describes the IBE profile options for caching and Secure Socket Layer setup.

Table A–18 *Profile Options for Caching and SSL*

Profile Option Name	Req?	Description
Note: Beginning with this release, you must use JTT Cache instead of IBE Cache.		
IBE: Cache On (Site level only)	No	Recommended value = No . A value of Yes turns off JTT cache and a value of No turns on JTT cache.
IBE: Use Web Cache Feature	No	Set to Yes or No depending on business need. Specifies whether to use Oracle9iAS Web Cache. Default = No.
IBE: iStore Non Secure URL	No	Specifies the base URL for the non-secure server (HTTP).
IBE: iStore Secure URL	No	Specifies the base URL for the secure server (HTTPS).

A.19 Miscellaneous Customer UI Profile Options

This section lists optional profile options that control miscellaneous Customer UI functionality.

Set the profile options in this section at the following levels:

- **Application**—iStore

The following table lists miscellaneous profile options for the Customer UI.

Table A–19 *Miscellaneous Customer UI Profile Options*

Profile Option Name	Description
IBE: Enable Debug (User level only)	Specifies whether user-specific logging is available for the JSP/Java and PL/SQL layers. Yes activates user-specific logging. Default = No. Important: If you have set the IBE: Enable 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 Customer UI user-specific logs for the PL/SQL layer are written in this directory.
OM: Debug Log Directory	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 Customer UI user-specific logs for the PL/SQL layer are written in this directory. Value = <Directory path>
IBE: Use AOL Menu	Specifies whether to use Oracle Application Object Library's (AOL) menu framework when logged in as a sales representative.
IBE: Use CABO UI	Set this profile option to Yes. Default = Yes.

A.20 Oracle Order Capture/Oracle Quoting Integration Profile Options

This section contains the profile option settings for integration with Oracle Order Capture and Oracle Quoting.

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 customer user responsibility
- **User**—Customer user name

The following table describes ASO profile options that affect Oracle iStore. This table does not include the mandatory profile options listed in other sections. [Section A.7, "Customer UI Mandatory Setup Profile Options"](#).

Table A–20 Oracle Order Capture and Oracle Quoting Integration Profile Options

Profile Option Name	Value	Description
ASO: Credit Card Authorization (Application level only)	Yes	If this profile option is set to Yes , credit card payment is authorized online. Set to No to disable online credit card authorization. Recommended value: Yes
ASO: Enable Line Level Billing (Site, application, and responsibility levels)	Yes/No	This profile option specifies whether B2B customers can enter line-level billing information at checkout. Default = No. Note: Payment type must be cash or invoice to use line level billing.
ASO: Enable Use Contracts (Application level only)	Yes/No	Yes activates integration with Oracle Sales Contracts, to enable features such as specialty store 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. Default = No. Before setting this profile option to Yes, you must install Oracle Sales Contracts and set the OKC profile options listed in Section A.22, "Oracle Sales Contracts Integration Profile Options" .
ASO: Quote Conversion Type	see description	Set this profile option to the same value as the Oracle Quoting 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.21 Oracle Configurator/Bills of Material Integration Profile Options

This section lists profile options required for integration with Oracle Configurator and Oracle Bills of Material (BOM). Set the profile options in this section at the levels described in the table below.

For more information, see:

- [Chapter 21, "Integrating Oracle iStore with Oracle Bills of Material"](#)
- [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#)

The following table lists Oracle Bills of Material and Oracle Configurator integration profile options.

Table A–21 Oracle Configurator and BOM Integration Profile Options

Profile Option Name	Value	Description
BOM: Configurator URL of UI Manager	Oracle Configurator Servlet URL	Required for Configurator integration. Specifies the URL for the Oracle Configurator Servlet. Set it at (1) site, (2) iStore application, and (3) IBE_CUSTOMER responsibility.
ASO: Configurator URL	see description	Required. Set to the same value as BOM: Configurator URL of UI Manager.
OM: Use Configurator	Yes	Required. Set at site level to Yes if you are integrating with Oracle Configurator.

A.22 Oracle Sales Contracts Integration Profile Options

This section contains the profile options required for successful integration with Oracle Sales Contracts.

For more information, see [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#).

Set the profile options in this section at any of the following levels:

- **Site**
- **Application**—iStore
- **Responsibility**—IBE_CUSTOMER and any other Oracle iStore customer user responsibility

The following table describes the Oracle Sales Contracts integration profile options.

Table A–22 Oracle Sales Contracts Integration Profile Options

Profile Option Name	Value	Description
OKC: Change Request Approver	User name	This profile option specifies the Oracle Sales Contracts user who can approve, reject, or forward contract terms and conditions change requests.
OKC: Contract Approver	User name	This profile option specifies the Oracle Sales 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 Sales Contracts template name	This profile option specifies the default Oracle Sales Contracts template name. You can set up different Oracle Sales Contracts templates for each Oracle iStore customer user responsibility. Oracle iStore 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 user rejects standard terms and conditions. The notification appears in the contract administrator's Oracle Sales Contracts inbox. Note: This contract administrator must also be a CRM Resource.
OKC: Default group for contracts created from quote	Oracle Sales Contracts group	This profile option specifies the default group for contracts created from Oracle iStore 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.
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.23 Oracle Content Manager Integration Profile Options

The following profile options should be set if you are integrating with Oracle Content Manager. The internal product code/key for Oracle Content Manager is IBC. Set the profile options in this section at the levels indicated in the following table.

See [Chapter 23, "Integrating Oracle iStore with Oracle Content Manager"](#), for more information.

Table A–23 Oracle Content Manager Integration Profile Options

Profile Option Name	Value	Description
IBC: Folder/Directory for New Items site level	iStore Directory	Specifies the default folder for OCM integration; allows the iStore administrator to access the correct folder in OCM.
IBE: Number of Days for Expiring Content iStore application level	any integer	Determines the timeframe for the default search performed in the Usage Summary screen. Oracle iStore reads the value of this profile option (x) and includes only those content items whose expiration date is that number of days (x) or less from system date (current date). Default value = Null. If set to Null, all content items will display, regardless of expiration date.
IBE: Use Content Management Integration iStore application level	Yes	When you run the iStore Content Items Migration concurrent program, the concurrent program sets the profile option, IBE: Use Content Management Integration , to Yes at the iStore application level. Note that you cannot use this profile option to turn "off" the integration between Oracle iStore and Oracle Content Manager.

Table A–23 Oracle Content Manager Integration Profile Options (Cont.)

Profile Option Name	Value	Description
IBC: Use Access Control see description for levels	No/Yes	Set to Yes at the site level. Ensure that the profile option is set to No at all other levels. This profile option controls whether user permissions are checked in the OCM pages. If this profile option is set to No at the iStore administrator responsibility level, then the iStore administrator has access/permissions to all content functionality. If the profile option is set to Yes, then you can control the permissions at the user level. See the <i>Oracle Content Manager Implementation Guide</i> for additional details.

A.24 Oracle Marketing Integration Profile Options

The following profile options should be set if you are integrating with Oracle Marketing. The internal key for Oracle Marketing is AMS. Set the profile options in this section at the levels indicated in the following table.

See [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

Table A–24 Oracle Marketing Integration Profile Options

Profile Option Name	Value	Description
IBE: Use Advanced Product Setup updateable at all levels, depending upon business need	see description	Controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Store Administration UI. To invoke Oracle Marketing's Product pages, set this profile option to Yes at the iStore application level. If set to No , then Oracle iStore's Product Detail pages will be retrieved.
AMS: Inventory Item Update Allowed site level	Yes	Allows items created in Oracle Inventory to be updated through the Oracle iStore-Oracle Marketing integration screens.

Table A–24 Oracle Marketing Integration Profile Options (Cont.)

Profile Option Name	Value	Description
OSO: Debug Messages On site level	Yes	Allows Oracle Marketing debug messages to appear.
AMS: Item Validation Organization site level cannot be set at responsibility level	see description	Set this to your Master Organization at site level. This profile option and IBE: Item Validation Organization profile option must match at site level. ■ Note that if you set IBE: Item Validation Organization at iStore administrator responsibility level to a different inventory organization than that specified at site level in AMS: Item Validation Organization, then the iStore administrator will not have access to the product creation abilities; however, he will still be able to update products in the inventory organization specified at the responsibility level.

A.25 Non-Supported Profile Options

The following IBE profile options are not supported:

- IBE: Add number of rows to direct entry cart
- IBE: Attachment Document Category
- IBE: Capture Payment for Downloadable Products
- IBE: Cart Level Support Duration
- IBE: Create Standard Contract
- IBE: Days For Email
- IBE: Default Contract Template Name
- IBE: Default Display Context
- IBE: Default Item Media
- IBE: Default Item Template

- 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 Sales Lead Promotion Code
- IBE: Default Section Media
- IBE: Default Section Template
- IBE: Display Specialty Store Selection in Alphabetical Order
- IBE: Dynamic Content Callback Parameter
- IBE: Email Promotions
- IBE: Enable Walkin Order Search in Order Tracker
- IBE: Express Checkout Error Behavior
- IBE: Finalize Order On Error in Authorize Payment
- IBE: Line Level Pricing Event for Shopping Cart
- IBE: Maximum Number of Saved Shopping Carts
- IBE: Maximum Number of Shopping Lists
- IBE: Number of Days for New Item Definition
- IBE: Preload Specialty Store Cache
- IBE: Preferred Support Level for Shopping Cart
- IBE: Reserve Items On Every Express Checkout
- IBE: Search Minimum Prefix Value
- IBE: Search Operator
- IBE: Section Name for CD Packs Section
- IBE: Shopping Cart Expiration Duration
- IBE: Shopping Cart Price based on Owner
- IBE: Shopping Cart Price Frozen Duration
- IBE: SMTP Server
- IBE: Top Number of Items
- IBE: URL Prefix for DataBase Media

- IBE: URL Prefix for Media in File System
- IBE: URL to Launch Content Bin
- IBE: Use CD Packs
- IBE: Use Contracts
- IBE: Use CSI Number in Order Tracker
- IBE: Use Default Bin Preference
- IBE: Use Fax Credit Card as a Payment Option
- IBE: Use Invoice as a Payment Option
- IBE: Use JTA User Management
- IBE: Use Line Types
- IBE: Use Notes
- IBE: Use Quote Publishing
- IBE: Use Shop List
- IBE: Use Tasks
- IBE: View Custom Quote Line Details

Concurrent Programs

This chapter describes Oracle Applications concurrent programs used by Oracle iStore 11i.

Main topics in this chapter include:

- [Overview of Oracle Applications Concurrent Programs](#)
- [Overview of Oracle iStore Concurrent Programs](#)
- [Search Functions Concurrent Programs](#)
- [Order Submission Concurrent Program](#)
- [Reporting Concurrent Programs](#)
- [iStore Lead Import Concurrent Program Set](#)
- [iStore Product Autoplacement](#)
- [iStore Oracle Content Manager Integration Migration](#)
- [Setting Concurrent Program Manager Profile Options](#)
- [Running Concurrent Programs](#)
- [Checking Concurrent Program Status](#)
- [Sending Concurrent Program Results by Email](#)

B.1 Overview of Oracle Applications Concurrent Programs

In Oracle Applications, concurrent programs are system batch jobs that retrieve and push data between Oracle applications and the database. Concurrent programs can be comprised of a single request or a request set containing more than one

concurrent program. Concurrent programs usually have logs associated with them that provide details of the concurrent program data.

When to Schedule Oracle Applications Concurrent Programs

You can set up and start using Oracle Applications concurrent programs at any time in your implementation. Programs can be set to run on a schedule or only upon user request. For more complete information on Oracle Applications concurrent programs, see *Oracle Applications System Administrator's Guide*.

When to Schedule Programs - Oracle iStore Specifically

See the detail descriptions of the iStore concurrent programs. For a summary of the programs available, see: [Section B.2, "Overview of Oracle iStore Concurrent Programs"](#).

Steps to Run Concurrent Programs

See [Section B.11, "Running Concurrent Programs"](#) for quick-steps.

See *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

B.2 Overview of Oracle iStore Concurrent Programs

There are eight concurrent jobs seeded in the Oracle Applications (Forms) iStore concurrent program manager setup. The list below is organized by concurrent program type (i.e., what it does).

- Search Functions Concurrent Programs
 - [iStore Search Insert](#)
 - [iStore Section Search Refresh](#)
- Order Submission Concurrent Program
 - [iStore - Express Checkout Order Submission](#)
- Reporting Concurrent Programs
 - [iStore Reports Fact Tables Refresh](#)
 - [iStore Reports Materialized Views Refresh](#)
 - [iStore Reports Alerts](#)
- Lead Import Concurrent Program

- [iStore Lead Import Concurrent Program Set](#)
- Products Concurrent Program
 - [iStore Product Autoplacement](#)
- Oracle Content Manager Integration Concurrent Program
 - [iStore Oracle Content Manager Integration Migration](#)
- Oracle Marketing Integration Concurrent Program
 - [Oracle Marketing Integration Concurrent Program](#)

B.3 Search Functions Concurrent Programs

The following concurrent programs control the product search functionality.

B.3.1 iStore Search Insert

iStore Search Insert is a single request concurrent program that you execute one time as a post-install step during your Oracle iStore implementation. Run this batch job after you have loaded Oracle Inventory items and set the Inventory organizations. This program populates Oracle iStore'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. However, 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

B.3.2 iStore Section Search Refresh

This concurrent program populates Oracle iStore's section search table with product information.

To enable section-level search on the Customer UI for the first time, run the iStore Search Insert first, then run the iStore Section Search Refresh program. To switch from category-level to section-level search, run only the iStore Section Search Refresh program.

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

B.4 Order Submission Concurrent Program

The following concurrent program submits orders for Express Checkout:

B.4.1 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.

B.5 Reporting Concurrent Programs

This section describes the concurrent programs that populate database tables required for store reports and store reports delivered via e-mail.

B.5.1 iStore Reports Data Refresh Set

Oracle iStore currently has two program sets for Reports data refresh:

- **iStore Reports Complete Data Refresh Set** --- See [Section B.5.1.4, "Guidelines for Running Complete Data Refresh Set"](#).
- **iStore Reports Increment Data Refresh Set** --- See [Section B.5.1.5, "Guidelines for Running Increment Data Refresh Set"](#).

Each set contains the following three programs:

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

These programs are necessary to update data for Oracle iStore Reports and to trigger e-mail notifications of reports.

B.5.1.1 iStore Reports Fact Tables Refresh

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

B.5.1.2 iStore Reports Materialized Views Refresh

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

B.5.1.3 iStore Reports Alerts

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

B.5.1.4 Guidelines for Running Complete Data Refresh Set

Run this request set:

- When you want to change the parameters specifying the data that is available to Oracle iStore Reports;
- When the data within your previously specified parameters has changed since you last ran the program; and
- When you need to update the reports materialized views to reflect data changes in the 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 reports data.

B.5.1.5 Guidelines for Running Increment Data Refresh Set

This request set is identical to the Complete Data Refresh Set, but it only updates the fact tables and materialized views with data **from the time since the last data refresh was run**.

Run this request set when you want to add data to the 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 Reports data.

B.6 iStore Lead Import Concurrent Program Set

The concurrent program request set, **iStore Lead Import Set**, pulls data matching certain parameters into the Oracle Sales leads database table.

The request set contains the following concurrent programs:

- iStore Lead Import Quotes
- iStore Lead Import Orders

For more information, see [Section 27.5.3, "Running iStore Lead Import Concurrent Program Set"](#).

B.7 iStore Product Autoplacement

The **iStore Autoplacement** can be used to populate leaf sections with products from Oracle Inventory categories. The program also can remove products from sections that no longer match the criteria of the concurrent program and section-category mappings.

For more information, see [Section 6.6, "Using Product Autoplacement"](#).

B.8 iStore Oracle Content Manager Integration Migration

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, **iStore Oracle Content Manager Integration Migration**.

Both existing customers and new customers who want to use the OCM integration must run the concurrent program as a mandatory step to migrate the seed and customer data.

See [Section 23.6, "Concurrent Program to Migrate Data"](#), for more information.

B.9 Oracle Marketing Integration Concurrent Program

If you are integrating Oracle iStore with Oracle Marketing's product screens, you must load the inventory categories information into Oracle Marketing database tables. To do this, run the concurrent program, **AMS Load Inventory Categories**. After this program is run, the categories information shows up in the Oracle Marketing UI.

See [Chapter 25, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

B.10 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.4, "Concurrent Program Manager Profile Options"](#), for profile option values.

B.11 Running Concurrent Programs

Below are instructions for running any Oracle Applications concurrent program or program set. You can use these procedures to run or schedule any of the Oracle iStore concurrent programs.

See *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

Prerequisites

None

Login

Oracle Applications -- Forms

Responsibility

- For Oracle Applications concurrent programs in general, it varies by module.
- For Oracle iStore concurrent programs, use **iStore Concurrent Programs Responsibility**

Steps

1. Log in to Oracle Forms with the appropriate responsibility as described under **Responsibility**, above. The **Submit a New Request** form opens.

2. Choose **Single Request** (to run a single concurrent program) or **Request Set** (to run a set of concurrent programs).
3. Select **OK**. The **Submit Request** form opens.
4. Query for the appropriate concurrent program, if necessary.
5. Select the desired request or request set.
6. Either run immediately or select **Schedule** to schedule the batch jobs.
7. If scheduling, select the timeframe:
 - **As Soon as Possible radio button** -- To run the program(s) right away, select this option and then select **OK**.
 - **Once radio button** -- To run the program(s) once at a time that you will later specify, select this option and then select **OK**.
 - **Periodically or On Specific Days radio buttons** -- To run the program(s) on a schedule that you will later specify, select this option, enter information in the appropriate fields, and then select **OK**.
8. Click **Submit** to submit the request. You receive a confirmation that the request has been submitted.
9. Optional: You can monitor the progress of your request by looking at the request log and output files in \$COMMON_TOP/admin/log/l<request ID>.log and \$COMMON_TOP/admin/out/<request ID>.out, respectively.
10. Optional: You can also view the request status by selecting **View > Requests** and searching by the request ID.

B.12 Checking Concurrent Program Status

Use the following procedure to check the status of a concurrent program.

Prerequisites

None

Responsibility

System Administrator

Navigation

Log in to Oracle Forms.

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. The Oracle iStore concurrent programs should be listed.
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.

B.13 Sending Concurrent Program Results by Email

You can send the results of concurrent requests via e-mail. Instructions can be found in the *Enhancing Concurrent Processing* whitepaper in the performance section of [Oracle AppsNet](http://oracle.com/appsnet/technology/performance/content.html) (<http://oracle.com/appsnet/technology/performance/content.html>).

Seeded Responsibilities

This appendix lists the seeded (supplied out-of-the-box) Oracle Forms, Oracle CRM Applications, and Oracle iStore 11i Store Administration and Customer UI users and responsibilities necessary to implement Oracle iStore.

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.

Main topics in this appendix include:

- [Understanding Oracle Applications Responsibilities](#)
- [Oracle Forms Responsibilities for Oracle iStore Setup](#)
- [Oracle E-Business Suite Responsibilities for Oracle iStore Setup](#)
- [Oracle iStore Customer UI Responsibilities](#)

C.1 Understanding Oracle Applications Responsibilities

User names and responsibilities are set up in Oracle Applications to secure access to the data and functionality within the applications. The key element in Oracle Applications security is the definition of a responsibility. A responsibility defines:

- Application database privileges
- An application's functionality that is accessible
- The concurrent programs and reports that are available

The system administrator defines application users and assigns one or more responsibilities to each user. In the Oracle iStore context, the system administrator may be you or another person.

See *Oracle Applications System Administrator's Guide* and *Oracle Applications User's Guide* for more information on how to set up user names and responsibilities.

All Oracle Applications products are installed with predefined responsibilities known as *seeded* responsibilities. Consult the implementation or reference guide for your Oracle Applications product for the names of those predefined responsibilities.

C.2 Oracle Forms Responsibilities for Oracle iStore Setup

Access Oracle Forms by navigating to:

`http://<host>:<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 in Oracle Forms.

Table C–1 Oracle Forms Responsibilities

Responsibility	Tasks
AK Developer	Define regions in Apps to troubleshoot Postsales errors.
Application Developer	Enable or disable B2B or B2C user registration. Modify specialty store text messages. Set up descriptive flexfields to appear on item detail pages. Set up comment flexfields to appear on the checkout page.
Apps for the Web Manager	Define regions in Apps to troubleshoot Postsales errors.
General Ledger Super User	Set the daily currency conversion rate and create calendars in Oracle General Ledger for iStore Reports.
Inventory responsibility	Inventory setups.
iStore Concurrent Programs Responsibility	Schedule or run iStore concurrent programs
Order Management Super User	Set up Oracle Order Management.
Receivables Manager	Set up Oracle Receivables.

Table C–1 Oracle Forms Responsibilities (Cont.)

Responsibility	Tasks
System Administrator	Set profile options. Set up Oracle iStore administrator and guest user accounts. Check the status of concurrent program requests. Set up credit card payments in Oracle iStore.

C.3 Oracle E-Business Suite Responsibilities for Oracle iStore Setup

Access the Oracle E-Business Suite HTML login page at:

`http://<host>:<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 in Oracle CRM Applications.

Table C–2 Oracle E-Business Suite HTML Applications Users and Responsibilities

User	Responsibility	Tasks
<Store Manager User Account>	iStore Administrator	All tasks within the Store Administration UI.
	IBE_ADMINSTRATOR	
	Logging in with this responsibility launches the Oracle iStore Store Administration UI.	
SYSADMIN	Foundation (HTML) Administration	Set up Oracle CRM Technology Foundation. Set up default roles and responsibilities for customer users.
	Logging in with this responsibility launches the Oracle CRM System Administrator Console.	

C.4 Oracle iStore 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 Store Administration UI, you can specify a list of the customer responsibilities that are supported by a given store. You can select these from all existing iStore responsibilities. You can also specify, for a given store, whether Oracle iStore checks the customer’s responsibilities and grants access only if the customer has an assigned responsibility that is supported by the store.

If multiple responsibilities are supported by a 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 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 store is not set up to check the customer’s responsibility, then the customer can choose any supported responsibility in any store that does not check the customer’s assigned responsibilities.

The following table summarizes the responsibilities seeded by Oracle iStore for Web store customers to use in the Customer UI, located at:

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

Table C–3 Oracle iStore 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.
<Customer User Account>	IBE_CUSTOMER	Select IBE_CUSTOMER or another customer responsibility to be assigned by default to every registered customer.

Advanced Display

This appendix contains information on advanced display functionality in Oracle iStore 11i.

Also refer to the *Oracle iStore API Reference Guide*.

Main topics in this appendix include:

- [Overview of Customizing Templates](#)
- [Overview of Customizing Catalog Display](#)
- [Customizing Section Templates](#)
- [Customizing Item Templates](#)
- [Advanced Content Tasks](#)
- [Configuring Bins](#)
- [Advanced Product Relationships Procedures](#)
- [Creating Deep Links](#)
- [API Documentation](#)

D.1 Overview of Customizing Templates

Oracle iStore Customer UI page designs use common components, such as tabs, bins, and common section pages. 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. The routing and processing pages determine what to do with the templates.

Oracle iStore 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. To help determine page flows, see [Appendix F, "Customer UI Process Flows"](#).

D.1.1 How Customer UI Pages Call Templates

Your Customer UI page can call for templates to display in two ways:

- Directly by using the template logical (programmatic access) name
- Indirectly by using the display style

D.1.1.1 Templates Called by Logical Name

You assign a template name and a programmatic access name to a template using the **Advanced > Template Manager** pages. You then assign one or more physical JSP files to combinations of stores and languages. At runtime, Oracle iStore looks at the customer's language and displays the files that are assigned to the customer's language for the store the customer is in. If no file is specified for the language, then the default source file for that store and all languages is displayed. If no file is specified for the store and all languages, then the default file for all stores and all languages is displayed.

Important: In order to avoid overwriting templates during upgrades, use the seeded templates. If you use your own custom templates, the custom templates will be overwritten when you apply upgrade patches.

D.1.1.2 Templates Called Indirectly

You can indicate that the template associated with a given display style will be used when displaying a product. See [Section D.5.3, "Using Display Styles for Default Display"](#), for information on creating your own display styles.

Note: Although using the display styles functionality provides additional flexibility, none of the out-of-the-box templates use the display styles concept.

Oracle iStore uses the following process to determine which template to use when displaying a product according to a given display style.

Example D–1 Product Template Display

1. For a given display style, Oracle iStore uses the template that you associated with the product.

2. If no template is associated at the product level, Oracle iStore retrieves the template associated with the product's primary display category.
3. If no template is associated with the product or category, Oracle iStore retrieves the default template for the display style.

D.1.2 Template Customization Tasks

To customize templates for your store, perform the following tasks after planning your web page designs:

- Gain an understanding of the recommended and/or mandatory page flows through your specialty stores. See [Appendix F, "Customer UI Process Flows"](#), for more information.
- Create template source files (JSPs) for pages or for blocks within pages using Oracle JDeveloper. If you are implementing multiple languages, create source files in each of the languages which you plan to support. Or, copy the seeded JSPs (save with a new name) and apply your modifications; then, map the new JSP to the page flow through Template Manager. See [Section D.1.3, "Creating Template Source Files"](#) and [Section D.1.4, "JSP Naming Conventions"](#), for more information.
- Choose Oracle iStore template names. See [Section D.1.5, "Creating New Templates"](#), for more information.
- Register templates in the Store Administration UI. See [Section D.1.6, "Registering New Templates in the Template Manager"](#), for more information.
- Assign template source files to templates. See [Section D.1.7, "Setting up Template Store-Language Mappings"](#), for more information.

See *Oracle iStore API Reference Guide* for more information about Oracle iStore Java APIs and standards for Oracle iStore JSP customization.

D.1.2.1 Upgrade Strategy for Custom JSPs

To avoid overwriting any custom JSPs during upgrades, map the custom JSP source files to the seeded programmatic templates using the Template Manager functionality.

See [Section D.1.7, "Setting up Template Store-Language Mappings"](#), for steps.

D.1.3 Creating Template Source Files

You can create new JSP templates to replace or add to the Oracle iStore seeded templates. Different physical JSP templates can be used at run-time based on the user's language and the store being accessed.

CAUTION: Never change an original JSP from Oracle iStore.

To modify a JSP, make a copy of the original JSP and modify only the copy.

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 Java. Java language methods in the HTML content generate dynamic content on the web page.

D.1.3.1 Example JSP Structure

The structure of a JSP 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>
```

D.1.3.2 Where to Store JSP Source Code

The default UNIX directory for JSP source code is `$COMMON_TOP/html` directory. **Store all of your source JSPs in this directory.** This will make future Oracle iStore upgrades less problematic.

D.1.3.3 Reboot the Server

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.

D.1.4 JSP Naming Conventions

Modify JSP source files only after copying them first. As a best practice, all modified JSPs should follow a standard naming convention.

Note that having a standard naming convention is a best practice suggestion only; it is not mandatory to use a specific naming convention in order for the JSPs to be valid.

D.1.5 Creating New Templates

Creating new templates involves giving the new templates names, descriptions, programmatic access names, and specifying the different physical JSP source files to be used at run-time based on language and specialty store.

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. You will be using the programmatic access names to access the templates via an iStore public API in your JSP page. An example is **phome**. Programmatic access names are not translated.

The template name and programmatic access name potentially can represent several physical template source files. Each physical file can be assigned to combinations of stores and languages. When Oracle iStore retrieves an assigned template name, the template source file is determined by the mapping of the template name to the current store and language.

The Display Manager is the class that implements Oracle iStore’s Template Manager. The Template Manager maintains a mapping from a template programmatic access name to a physical name (JSP) in the file system.

To use the Store Home Page as an example, STORE_HOME (programmatic access name) maps to ibezhome.jsp (physical file). When a web store is active, the Display Manager determines which physical file to call, based on the store being accessed and the user’s language. Different source files can be called for different store-language combinations.

The following table shows examples of file names for a fictitious template called **ProductHome**.

Table D–1 Sample JSP File Names for the Template Name ProductHome

Template Name	Programmatic Access Name	File	Specialty Store	Language
ProductHome	phome	hom1f.jsp	Store 1	French
ProductHome	phome	hom1e.jsp	Store 1	English
ProductHome	phome	hom2f.jsp	Store 2	French
ProductHome	phome	hom2e.jsp	Store 2	English

In this example, if a French customer enters Store 1 the store displays the home page file hom1f.jsp, which displays information in the French language.

An English customer in the same Store sees hom1e.jsp instead.

If merchants simply want to display the same information in a different language, they can use just one JSP and use AK regions or FND messages for translation. Mapping different JSPs to different languages would be used to display different information, not just translated information.

You can find steps to use AK regions and FND Messages in the *Oracle Self Service Implementation Manual* available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

D.1.6 Registering New Templates in the Template Manager

You must register new templates using the Advanced tab, Template Manager subtab in the Store Administration UI. Use this procedure to create or modify template names and programmatic access names, select default store-level template source files for them, and assign other template source files to them according to store and language settings.

Prerequisites

- A store has been created.
- A language has been defined.

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Log in to the Store Administration UI. Select the **Advanced** tab and then the **Template Manager** subtab. The **Templates** page appears.

The **Templates** pages list all templates in your implementation. For a list of seeded templates, see [Appendix E, "Display Templates and Media Objects"](#).

Optionally, use the Templates **search utility** to search for templates by **Name**, **Programmatic Access Name**, **Keywords**, **Description**, or **Applicable To** (display class). You may use the % sign as a wildcard. The search utility is case-insensitive. Press **Enter** or select the **Go** button to engage the search.

2. Select the **Add Template** button. The **Add Template** page appears.
3. In the **Name** field, enter the name by which the template is referred to during the planning stage, i.e., the common name.
4. In the **Programmatic Access Name** field, enter the logical name by which the template is referred to in its JSP source file.
5. Optionally, enter any keywords you wish to associate with this template in the **Keywords** field. After you enter and save keywords, you can use them in the search utility.
6. From the **Applicable To** LOV, select the display class for the template. The display class describes where the template will be used in the Customer UI. It has no programmatic purpose, but is helpful for grouping templates, and can be used when searching for templates using the search utility.
 - **Product** --- For templates which will display products only.
 - **Section Contains Navigational Subsections Only** --- For templates that will display sections which only contain navigational subsections and no featured subsections.

- **Section Contains Featured Subsection** --- For templates that will render a Featured subsection. The section itself also can have other navigational subsections. When a section has a Featured subsection, the section itself is never rendered because when the user clicks the parent section, the page flow automatically routes the user to the Featured subsection.
 - **Section Contains Products Only** --- For templates that will display sections which contain products only, and no subsections.
 - **Others** --- For all other templates, such as those that might be used to display checkout pages, order tracker pages, product search pages, and so forth.
 - **Uncategorized Section Display Templates** --- This category is used for backward compatibility only. It is not recommended that you select this category.
7. In the **Default** field, enter the name and extension (.jsp) of the default source file for the template. The default source file is used when a user attempts to retrieve the template and no other store-language mapping combination has been set up.
- In a single-language implementation, the default source file will generally be the same for all stores.
- You do not need to enter a directory name, just the JSP name and file extension.
8. At this point, optionally you may press **Cancel** to cancel the creation operation.
9. Select **Apply** to save changes. The screen refreshes and is renamed **Update Template**. A **Source File(s)** area displays at the bottom of the screen. The template has now been mapped to the default source file (specified in the step above) for all stores and all languages.
10. If you are implementing multiple stores and languages, use the steps in [Section D.1.7, "Setting up Template Store-Language Mappings"](#).

D.1.7 Setting up Template Store-Language Mappings

Use the following procedure to map specific store-language combinations to a template source file.

Prerequisites

- A appropriate template has been created. You can use the seeded templates or create templates of your own.

- A source file has been created for each of the store-language combinations that you wish to enable.

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Log in to the Store Administration UI. Select the **Advanced** tab and then the **Template Manager** subtab. The **Templates** page appears.

The **Templates** page lists all templates in your implementation.

Optionally, use the search utility to search for templates by **Name**, **Programmatic Access Name**, **Keywords**, **Description**, or **Applicable To** (display class).

Or, scroll through the list and find the template to update.

2. In the **Templates** page, select the **Update** icon for the template you are updating. The **Update Template** page appears.

In the **Source File(s)** area, a default source file will display for seeded templates that are being used to display content in the Customer UI. Some of the seeded templates do not have source files associated with them; this allows you to map your own source files to these templates. You will not be allowed to delete seeded source files.

If this is a template that you have created, and you have not mapped a default source file, then no source file will appear in this area.

The default source file is used when no other store-language mappings have been set up.

3. To begin mapping a source JSP file to the template, select the **Add Source File** button. The **Add Source File** page appears.
 - Remember, to avoid overwriting custom JSPs during upgrade, map to a seeded (supplied) template.
4. In the **Add Source File** page, enter the name of the source file in the **Source File Name** field. This should be the name of the JSP file to be used as the default if a specific store-language mapping cannot be found or is not defined.

5. Optionally, enter a description in the **Description** field.
6. In the **Store-Language** mapping table, select a store from the **Store** LOV. This will cause the **Language** LOV to become active.
7. The **Language** LOV will display only those languages which are supported by the store. To map a source file to a language supported by the selected store, select a language mapping from the **Language** LOV.
8. Press **Apply** to save the store-language mapping for this source file and template.
9. Repeat to create additional store-language mappings.
10. Optionally, select the **View All Mappings** button to get a summary view of all of the store-language mappings associated with this template.

D.2 Overview of Customizing Catalog Display

When you are preparing to customize Oracle iStore catalog display, you must first understand the flow involved in the seeded Oracle iStore catalog templates and know the logical name, physical file, and description for each template. Understanding the interactions between the catalog templates simplifies the task of customizing them.

The catalog display follows either a section display flow or an item display flow.

This section contains:

- [Section D.2.1, "Section Display Flow"](#)
- [Section D.2.2, "Item Display Flow"](#)
- [Section D.2.3, "Template Pairing"](#)
- [Section D.2.4, "Customizing the Style Sheet"](#)
- [Section D.2.5, "Customizing Help"](#)

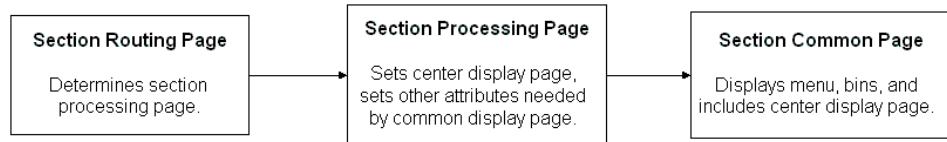
D.2.1 Section Display Flow

Oracle iStore uses the following flow to display a section:

1. When a section link is clicked, the request goes to the display routing page, `STORE_CTLG_SCT_ROUTE` (`ibeCCtpSctDspRte.jsp`), which determines which section processing template should be used and forwards the request to that template.

2. The section processing template sets the necessary attributes in the `PageContext.REQUEST_SCOPE` (including the logical template name of the center display page) and forwards to `STORE_CTLG_SCT_COMMON` (`ibeCCtdCmnSt.jsp`).
3. `STORE_CTLG_SCT_COMMON` (`ibeCCtdCmnSt.jsp`) displays the section.

Figure D–1 The Catalog Section Display Flow



D.2.1.1 Section Routing Page

`STORE_CTLG_SCT_ROUTE` (`ibeCCtpSctDspRte.jsp`) is the routing page for sections. It contains the processing logic for determining which template to use when displaying a section. If there is no template associated with a section, the routing page determines which default template to use based on the hierarchy data setup. There are three default templates:

- Product Detail Template -- `STORE_CTLG_FSUBSCT` is used for sections with featured subsections.
- Subsection List Template -- `STORE_CTLG_SCT_BULLET_SUBSCT` is used for sections with only navigational subsections.
- Product Detail Template -- `STORE_CTLG_LEAF_SCT_SINGLE` is used for leaf sections.

The section routing page applies the following rules when determining which template should be used to display a section:

1. If the section is the store's root section, forward to `STORE_CTLG_FSUBSCT_FWD` (`ibeCCtpFwdSubSct.jsp`). The store's root section is treated as a virtual section and the request is forwarded to its first navigational subsection.
2. If the section has a template associated with it (a Display Template set up in the Section > Display Template pages), forward to that template.
3. If the section is a Leaf section, forward to `STORE_CTLG_LEAF_SCT_SINGLE` (`ibeCCtpLeafSctSs.jsp`).

4. If the section is a non-leaf section and the section has featured subsections, forward to STORE_CTLG_FSUBSCT (ibeCCtpFSubSct.jsp).
5. Otherwise, forward to STORE_CTLG_SCT_BULLET_SUBSCT (ibeCCtpStBlSuSt.jsp).

D.2.1.2 Common Section Display Page

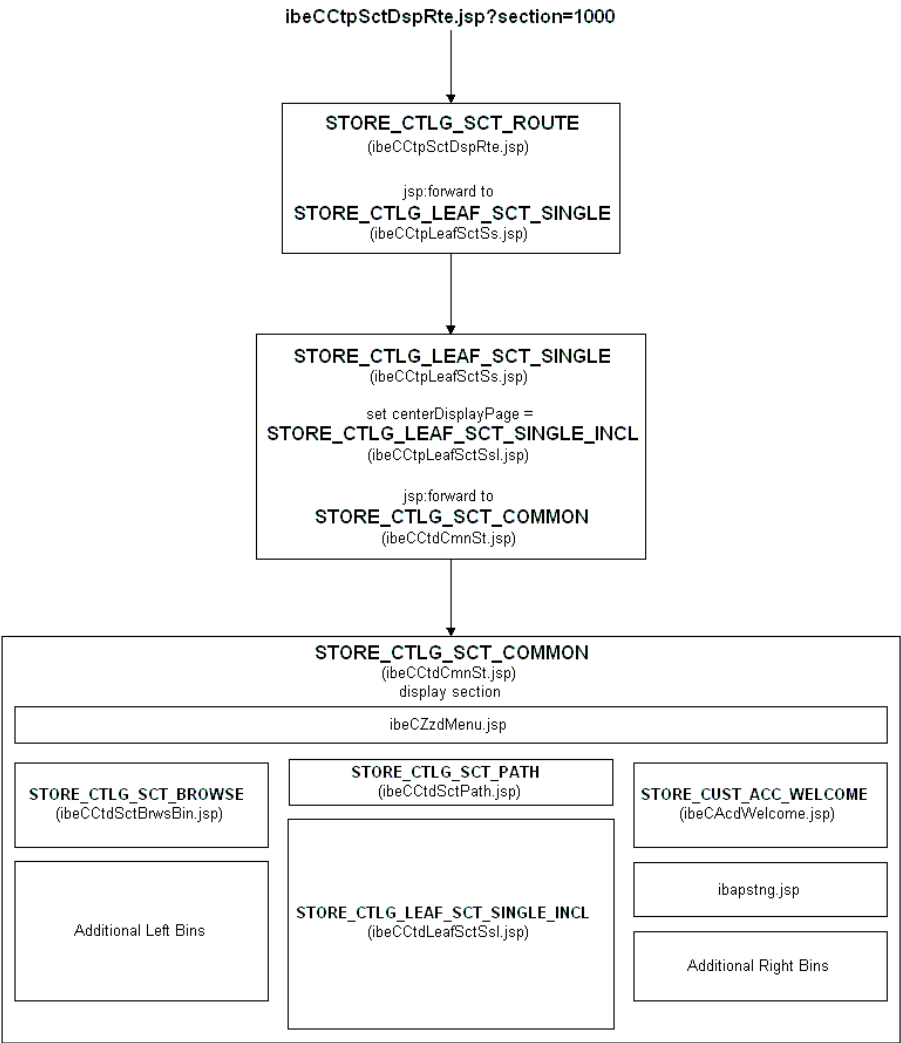
STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp) is the common display page used for displaying sections. It displays each portion of the common layout for section pages by including the JSP that handles the display in that location. STORE_CTLG_SCT_COMMON includes the following components:

- The menu at the top of the page.
- The left bins (browse bin, additional left bins) on the left side.
- The center components (section path traversed, center display page) in the center of the page.
- The right bins (Welcome Bin, eMerchandising posting from Oracle Marketing, additional right bins) on the right side.

D.2.1.3 Example

In the following example, assume that the data is set up such that template STORE_CTLG_LEAF_SCT_SINGLE is associated with section 1000. This example illustrates the flow through the catalog templates when a user clicks on the link `ibeCCtpSctDspRte.jsp?section=1000`.

Figure D–2 The Catalog Template Flow for Link `ibeCCtpSctDspRte.jsp?section=1000`



D.2.2 Item Display Flow

Oracle iStore uses the following flow to display an item (product):

1. When an item link is clicked, the request goes to `STORE_CTLG_ITM_ROUTE` (`ibeCCtpItmDspRte.jsp`) which determines the item template to use (the

template for display style STORE_PRODUCT_DETAILS) and forwards the request to that template. The default template is STORE_CTLG_ITEM_DETAILS (ibeCCtdItemDetail.jsp).

2. The item template displays the item detail page.

D.2.3 Template Pairing

For each section display, there is a pair of templates:

- A processing page that sets attributes needed by the common display page
- A center display page which generates the HTML for the center of the page

The section processing page specifies which center display page should be used. The following naming convention can be used to identify which section processing page corresponds to which center display page.

- **Section Processing Logical Name:** SECTION_PROCESS_NAME
- **Section Center Display Logical Name:** SECTION_PROCESS_NAME_INCL
- **Section Processing Physical File:** ibeCCtpName.jsp
- **Section Center Display Physical File:** ibeCCtdNameI.jsp

Example

Product Detail section Display Template:

- **Section Processing Logical Name:** STORE_CTLG_FSUBSCT
- **Section Center Display Logical Name:** STORE_CTLG_FSUBSCT_INCL
- **Section Processing Physical File:** ibeCCtpFSubSct.jsp
- **Section Center Display Physical File:** ibeCCtdFSubSctl.jsp

For a list of seeded templates, see [Appendix E, "Display Templates and Media Objects"](#).

D.2.4 Customizing the Style Sheet

Provide a custom style sheet using the following procedure.

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy jtfucss.css into another file.
2. Make the necessary changes to the new style sheet, using the style sheet editor of your choice.
3. Map the logical Display Template, STORE_STYLE_SHEET, to the new physical style sheet file. See [Section 8.2.4, "Mapping Source Files to Display Templates"](#), for instructions.
4. Restart the Apache server after making these changes.

D.2.5 Customizing Help

The help icon on the menu will only be displayed if there is a template association for the help page.

Provide a custom help page using the following procedure.

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy ibeCZzdHelp.jsp into another file.
2. Make the necessary changes to the JSP.

3. Modify the template data setup. Log in to the Store Administration UI and add the necessary logical to physical template mappings for `STORE_HELP_PAGE`. In the Template Details page, add a new source file for the new help page. 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 is no seeded default value for `STORE_HELP_PAGE`.

D.3 Customizing Section Templates

You can customize the section routing behavior, section browse bin, section path, and common layout, and create section pages using common or custom layouts.

D.3.1 Customizing the Section Routing Behavior

In most cases, the section routing behavior will not need changes since it is data driven. `STORE_CTLG_SCT_ROUTE` (`ibeCCtpSctDspRte.jsp`) contains processing logic for determining the template to forward to based on the template associated with a section. If the section routing behavior needs to be changed (for example, to change the default destination pages when no template is associated with a section), customize `STORE_CTLG_SCT_ROUTE` (`ibeCCtpSctDspRte.jsp`).

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy `ibeCCtpSctDspRte.jsp` into a new JSP.
2. Make the necessary changes in the new JSP.
3. Modify the template data setup. In this case, the same logical template name should be used because `STORE_CTLG_SCT_ROUTE` is used in all other JSPs when building links to sections. Log in to the Store Administration UI and add the necessary logical to physical template mappings for `STORE_CTLG_SCT_`

ROUTE. In the Template Details page, add a new source file for the new JSP. To use this source file for all minisites and all languages, add a mapping for ALL minisites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Store And Language Mappings":

- All minisites, French
- All minisites, American English

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL minisites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

D.3.2 Customizing the Section Browse Bin

If the display of the section navigation bin needs to be changed, customize STORE_CTLG_SCT_BROWSE (ibeCCtdSctBrwsBin.jsp).

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy ibeCCtdSctBrwsBin.jsp to a new JSP.
2. Make the necessary changes in the new JSP.
3. Modify the template data setup. In this case, the same logical template name should be used because STORE_CTLG_SCT_BROWSE is used in other JSPs when including the browse bin. Log in to the Store Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_SCT_BROWSE. In the Template Details page, add a new source file for the new JSP. To use this source file for all minisites and all languages, add a mapping for ALL minisites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Store And Language Mappings":

- All minisites, French
- All minisites, American English.

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL minisites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

D.3.3 Customizing the Section Path

If the display of the section path needs to be changed, customize STORE_CTLG_SCT_PATH (ibeCCtdSctPath.jsp).

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy ibeCCtdSctPath.jsp into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because STORE_CTLG_SCT_PATH is used in other JSPs when including the path traversed. Log in to the Store Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_SCT_PATH. In the Template Details page, add a new source file for the new JSP. To use this source file for all minisites and all languages, add a mapping for ALL minisites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Store And Language Mappings"

- All minisites, French
- All minisites, American English.

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL minisites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

D.3.4 Customizing the Section Template Common Layout

In the seeded templates, all the section templates share the same layout. This layout is specified in STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp). All section pages are ultimately displayed by this page, with the center display page changing dynamically based on the attributes set by the section processing page. If the common layout model will be used, but the layout needs to be changed, customize STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp).

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy ibeCCtdCmnSt.jsp into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because the processing section JSPs forward to STORE_CTLG_SCT_COMMON to display the section. Log in to the Store Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_SCT_COMMON. In the Template Details page, add a new source file for the new JSP. To use this source file for all minisites and all languages, add a mapping for ALL minisites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Store And Language Mappings":

- All minisites, French
- All minisites, American English.

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL minisites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

D.3.5 Creating a Section Page With a Common Layout

To provide custom section display, create new section pages. If the new section display will use a common layout, two new JSPs need to be created.

Note: The CENTER_DISPLAY_PAGE used in this example is only a sample logical template used for the purposes of example, not a real template seeded out-of-the-box.

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Create a section processing page. This can be done by copying an existing section processing page (such as ibeCCtpFSubSct.jsp) or using the example below as a guideline.

```
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.ibe.displaymanager.DisplayManager" %>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%include file="ibeCZzpHeader.jsp" %>

<%
    String JSP_PAGE_NAME = "sectionProcesssPage.jsp";
    String lSectionIdStr = "";
    String lCenterDisplayPage = "";
    String lBeginIndexStr = "";

    /* Welcome Bin */
```

```

pageContext.setAttribute("showWelcomeBin", "true",
                        PageContext.REQUEST_SCOPE);

/* Center Display Page */
lCenterDisplayPage =
DisplayManager.getTemplate("CENTER_DISPLAY_PAGE").getFileName();
if(lCenterDisplayPage == null)
{
    lCenterDisplayPage = "";
    IBEUtil.log(JSP_PAGE_NAME,
                "Null template found for logical template name " +
                "CENTER_DISPLAY_PAGE",
                Logger.ERROR);
}

pageContext.setAttribute("centerDisplayPage", lCenterDisplayPage,
                        PageContext.REQUEST_SCOPE);

/* Get/Set section ID */
lSectionIdStr =
    (String) pageContext.getAttribute("section",
                                    PageContext.REQUEST_SCOPE);
if(lSectionIdStr == null || lSectionIdStr.equals(""))
{
    lSectionIdStr = (String) request.getParameter("section");
    if(lSectionIdStr == null)
    {
        lSectionIdStr = "";
        IBEUtil.log(JSP_PAGE_NAME, "Section is null", Logger.ERROR);
    }
}

pageContext.setAttribute("section", lSectionIdStr,
                        PageContext.REQUEST_SCOPE);

/* Get/Set beginIndex */
lBeginIndexStr =
(String) pageContext.getAttribute( "beginIndex",
                                PageContext.REQUEST_SCOPE);
if (lBeginIndexStr == null || lBeginIndexStr.equals(""))
{
    lBeginIndexStr = request.getParameter("beginIndex");
    if (lBeginIndexStr != null)
    {
        pageContext.setAttribute( "beginIndex", lBeginIndexStr,

```

```

                                PageContext.REQUEST_SCOPE);
        }
    }

    if (IBEUtil.showPosting())
    {
        // set item ids in the PageContext.REQUEST_SCOPE for use by
        // eMerchandising postings

        int[] itemIds = new int[0];

        // code to populate itemIds based on the items that will be displayed
        // on this section page

        if (itemIds.length > 0)
            pageContext.setAttribute("itemIds", itemIds, PageContext.REQUEST_
SCOPE);
    }

    String lCommonPage =
        DisplayManager.getTemplate("STORE_CTLG_SCT_COMMON").getFileName();
    %>

    <jsp:forward page="<%=lCommonPage%>" />

```

2. Create a center display page. This can be done by copying an existing section center display page (such as `ibeCCtdFSubSctI.jsp`) or using the example below as a guideline.

```

<%@include file="ibeCZzpRuntimeIncl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.ibe.displaymanager.*" %>
<%@page import="oracle.apps.jtf.base.resources.Architecture" %>
<%@page import="oracle.apps.jtf.base.interfaces.MessageManagerInter" %>
<%@page import="oracle.apps.jtf.base.Logger" %>

<%
    // processing logic to retrieve all section and item information that will
    // be displayed on the page

    boolean bSectionLoaded = false;
    Section s = null;

```



```

// declare variables for other objects that will be displayed:
// for example, featured subsections, navigational subsections, items,
// item prices, etc.

String lSectionIdStr =
    IBEUtil.nonNull((String)pageContext.getAttribute("section",
                                                    PageContext.REQUEST_SCOPE));

try {
    int lSectionId = Integer.parseInt(lSectionIdStr);
    s = Section.load(lSectionId, Section.DEEP);
    bSectionLoaded = true;

    // additional code to retrieve objects that will be displayed on the
page:
    // for example, featured subsections, navigational subsections, items,
    // item prices, etc.

} catch (NumberFormatException e) {
    IBEUtil.log(JSP_PAGE_NAME, "Could not parse section id=");
    IBEUtil.log(lSectionIdStr);
} catch (SectionNotFoundException e) {
    IBEUtil.log(JSP_PAGE_NAME, "Could not load section. Section id=");
    IBEUtil.log(JSP_PAGE_NAME, lSectionIdStr);
}

if (bSectionLoaded)
{
%>

<table width="100%">
<tr>
<td valign="top" width="100%" >
<!-- start middle column content-->

<!-- code to display section --%>

</td></tr></table>
<%
} // end section was loaded
%>

```

3. In the Store Administration UI, create a new logical template for the section processing page. Make sure that you create the template as one that "Displays: section."

4. In the Store Administration UI, create a new logical template for the center display page. Make sure that you create the template as one that "Displays: others."
5. Modify the section processing page as needed.

In the JSP, change the logical template name used for the center display page to be the logical template name created for the new center display page. Change

```
lCenterDisplayPage =  
    DisplayManager.getTemplate("STORE_CTLG_FSUBSCT_INCL").getFileName();
```

to

```
lCenterDisplayPage =  
    DisplayManager.getTemplate("CENTER_DISPLAY_PAGE").getFileName();
```

If Oracle Marketing's eMerchandising postings will be used, an `int[]` containing the item IDs of the items that will be displayed on the page must be set in the `PageContext.REQUEST_SCOPE`. There are examples of how to do this in the seeded templates.

6. Modify the display page as needed.

Retrieve the necessary section and item information using the Section and Item APIs, which are described in *Oracle iStore API Reference Guide*.

Display the information as desired.
7. In the Store Administration UI, map the new template to a section as desired. See [Section 7.4.6, "Setting Display Templates for Sections"](#), for steps.

D.3.6 Creating a Section Page With a Custom Layout

To provide custom section display, create new section pages. If the new section display will use its own custom layout, only one new JSP needs to be created.

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Create a section display template. See the example below.

```
<%@include file="jtfincl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="java.math.BigDecimal" %>
<%@page import="oracle.apps.jtf.base.Logger" %>

<%
    String JSP_PAGE_NAME = "mySectionJsp.jsp";
    MessageManagerInter msgMgr =
        Architecture.getMessageManagerInstance();
    int lSectionId = -1;
    String lSectionIdStr = "";
    String lShowWelcomeBinStr = "";
    boolean bShowWelcomeBin = true;
    String browsePage = "", pathPage = "", welcomePage = "";
    Section lSection = null;

    // declare variables for other objects that will be
    // displayed: for example, featured subsections, items, item prices, etc.

    /* Get section ID String */
    lSectionIdStr =
        (String)pageContext.getAttribute("section", PageContext.REQUEST_SCOPE);
    try
    {
        lSectionId = Integer.parseInt(lSectionIdStr);
    }
    catch(NumberFormatException e)
    {
        lSectionId = StoreMinisite.getRootSectionID().intValue();
    }

    /* Get show welcome bin */
    lShowWelcomeBinStr =
        (String)pageContext.getAttribute("showWelcomeBin",
```

```

                                PageContext.REQUEST_SCOPE);
if(lShowWelcomeBinStr == null || lShowWelcomeBinStr.equals(""))
{
    lShowWelcomeBinStr = "true";
}

if(lShowWelcomeBinStr.equalsIgnoreCase("false"))
{
    bShowWelcomeBin = false;
}

/*
 * Get the value of all the pages and bins to display
 */

/* Section Hierarchy Tree Browse Bin */
if(IBEUtil.useFeature("IBE_USE_SECTION_BIN"))
{
    browsePage =
DisplayManager.getTemplate("STORE_CTLG_SCT_
BROWSE").getFileName();if(browsePage == null)
    {
        browsePage = "";
    }
}

/* Section Section Path Bin */
if(IBEUtil.useFeature("IBE_USE_SECTION_PATH"))
{
    pathPage =
        DisplayManager.getTemplate("STORE_CTLG_SCT_PATH").getFileName();
    if(pathPage == null)
    {
        pathPage = "";
    }
}

/* Welcome Page Bin */
if(bShowWelcomeBin)
{
    welcomePage =
        DisplayManager.getTemplate("STORE_CUST_ACC_WELCOME").getFileName();

    if(welcomePage == null || welcomePage.equals(""))
    {

```

```

        bShowWelcomeBin = false;
        IBEUtil.log(JSP_PAGE_NAME,
                    "Welcome Page is either null or not specified",
                    Logger.ERROR);
    }
}

if (IBEUtil.showPosting())
    pageContext.setAttribute("pageType", "SECTION",
                             PageContext.REQUEST_SCOPE);

/* load section and other objects that will be displayed */
try
{
    lSection = Section.load(lSectionId);

    // additional code to retrieve other objects that will be displayed
    // on the page: for example, featured subsections, navigational
    // subsections, items, item prices, etc.

    if (IBEUtil.showPosting())
    {
        // set item ids in the PageContext.REQUEST_SCOPE for use by
        // eMerchandising postings

        int[] itemIds = new int[0];

        // code to populate itemIds based on the items that will be
displayed
        // on this section page

        if (itemIds.length > 0)
            pageContext.setAttribute("itemIds", itemIds,
                                     PageContext.REQUEST_SCOPE);
    }
}
catch (SectionNotFoundException ex)
{
    IBEUtil.log(JSP_PAGE_NAME,
                "Could not load (shallow) section with ID" + lSectionId,
                Logger.ERROR);
    lSection = null;
}

```

```
        if(lSection != null)
        {
            pageContext.setAttribute("_pageTitle", lSection.getDisplayName(),
                                     PageContext.REQUEST_SCOPE);
        }
        else
        {
            pageContext.setAttribute("_pageTitle", "", PageContext.REQUEST_SCOPE);
        }
    }

    %>

    <%@ include file="ibeCCTpPostingI.jsp" %>
    <%@ include file="ibeCZzdTop.jsp" %>
    <%@ include file="ibeCZzdMenu.jsp" %>

    <!-- body section ----->
    <table border="0" width="100%">

        <tr>
            <td> &nbsp; </td>

            <!-- left column ----->
            <td valign="top">

                <%-- sections bin ----->
                <%
                    if(IBEUtil.useFeature("IBE_USE_SECTION_BIN") &&
                       !browsePage.equals(""))
                    {
                %>
                    <jsp:include page="<%=browsePage%>" flush="true" /><br>
                <%
                    }
                %>
            </td>

            <!-- center column ----->
            <td valign="top" width="100%">
                <%
                    if(IBEUtil.useFeature("IBE_USE_SECTION_PATH") &&
                       !pathPage.equals(""))
                    {
                %>
                    <table width="100%">
```

```

        <tr>
            <td colspan="2" class="smallLink">
                <jsp:include page="<%=pathPage%>" flush="true" />
            </td>
            <td>
                &nbsp;
            </td>
        </tr>
    </table>

<%
}

if (lSection != null)
{
    // code to display section/items.
    // for examples, see out of the box section center display templates
}
%>
</td>

<!-- right column ----->
<td valign="top">
    <!-- RHS bins ----%>

    <!-- welcome bin -----%>
<%
if (bShowWelcomeBin)
{
%>
    <jsp:include page="<%=welcomePage%>" flush="true" /><br>
<%
}
%>

<%
if (IBEUtil.showPosting())
{
    IBEUtil.log(JSP_PAGE_NAME, "eMerchandising posting - BEGIN");
    try {
%>
        <jsp:include page="ibapstng.jsp" flush="true" /><br>
<%
    } catch (Throwable t) {
        IBEUtil.log(JSP_PAGE_NAME,
            "Error occurred while including eMerchandising page");
    }
}

```

```
        IBEUtil.log(JSP_PAGE_NAME, "eMerchandising posting - END");
    }
    %>

    </td>
</tr>
</table>

<%@ include file="ibeCZzdBottom.jsp" %>
```

2. In the Store Administration UI, create a new logical template for the section display page. Make sure that you create the template as one that "Displays: section."
3. In the Store Administration UI, map the new template to a section as desired. See [Section 7.4.6, "Setting Display Templates for Sections"](#), for steps.

D.4 Customizing Item Templates

You can customize item routing behavior and create item detail templates.

D.4.1 Customizing the Item Routing Behavior

In most cases, the item routing behavior will not need changes since it is data driven. `STORE_CTLG_ITM_ROUTE` (`ibeCCtpItmDspRte.jsp`) contains processing logic for determining the template to forward to based on the template associated with display context `STORE_PRODUCT_DETAILS` for a particular item. If the item routing behavior needs to be changed (for example, to change the display context that is used), customize `STORE_CTLG_ITM_ROUTE` (`ibeCCtpItmDspRte.jsp`).

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy `ibeCCtpItmDspRte.jsp` into a new JSP.

2. Modify the new JSP as needed. For example, change the display context that is used. If modifying the display context, make sure that all templates associated with the new display context produce HTML for displaying an entire page.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because STORE_CTLG_ITM_ROUTE is used in all other JSPs when building links for items. Log in to the Store Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_ITM_ROUTE. In the Template Details page, add a new source file for the new JSP. To use this source file for all minisites and all languages, add a mapping for ALL minisites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Store And Language Mappings":

- All minisites, French
- All minisites, American English.

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL minisites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

D.4.2 Creating an Item Detail Template

To provide a custom display of the item detail page, create a new item detail page.

Prerequisites

None

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Copy ibeCCtdItemDetail.jsp into a new JSP or use the example below as a guideline.

```
<%@page import="oracle.apps.ibe.order.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
```

```
<%@page import="oracle.apps.jtf.displaymanager.*" %>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%@page import="oracle.apps.jtf.minisites.*" %>

<%% include file="ibeCZzpHeader.jsp" %>
<%
    MessageManagerInter msgMgr = Architecture.getMessageManagerInstance();
    pageContext.setAttribute("_pageTitle",
        msgMgr.getMessage("IBE_PRMT_CT_PRODUCT_DETAILS"),
        PageContext.REQUEST_SCOPE);

    String lItemId =
        IBEUtil.nonNull((String)pageContext.getAttribute("item",
            PageContext.REQUEST_SCOPE));

    if (lItemId.equals(""))
    {
        lItemId = IBEUtil.nonNull(request.getParameter("item"));
        pageContext.setAttribute("item", lItemId, PageContext.REQUEST_SCOPE);
    }

    if (IBEUtil.showPosting())
    {
        // used by ibeCCTpPostingI.jsp
        pageContext.setAttribute("pageType", "ITEM", PageContext.REQUEST_SCOPE);

        // set itemIds[] for eMerchandising posting
        try {
            int[] itemIds = new int[1];
            String itemIdStr =
                (String) pageContext.getAttribute("item", PageContext.REQUEST_
SCOPE);
            itemIds[0] = Integer.parseInt(itemIdStr);
            pageContext.setAttribute("itemIds", itemIds, PageContext.REQUEST_
SCOPE);
        } catch (NumberFormatException e) {}
    }
%>

<%% include file="ibeCCTpPostingI.jsp" %>
<%% include file="ibeCZzdTop.jsp" %>
<%% include file="ibeCZzdMenu.jsp" %>

<%
    String lSectionId = "";
```

```

int sectid = 0, itmid = 0;

Item itm = null;

// declare variables for other objects that will be
// displayed: for example, item images, item prices, item flexfields,
// related items, etc.

lSectionId = IBEUtil.nonNull(request.getParameter("section"));
if (lSectionId.equals(""))
    lSectionId =
        IBEUtil.nonNull((String)pageContext.getAttribute("section",
            PageContext.REQUEST_SCOPE));

/* sections path */
if(IBEUtil.useFeature("IBE_USE_SECTION_PATH"))
{
    try {
        sectid = Integer.parseInt(lSectionId);
        pageContext.setAttribute("section", String.valueOf(sectid),
            PageContext.REQUEST_SCOPE);

        pathPage =
            DisplayManager.getTemplate("STORE_CTLG_SCT_PATH").getFileName();
    } catch (NumberFormatException e) { }
    if(pathPage == null)
        pathPage = "";
}

try {
    itmid = Integer.parseInt(lItemId);
    itm = Item.load(itmid, Item.DEEP);
    bItemLoaded = true;

// additional code to retrieve other objects that will be displayed
// on the page: for example, item images, item prices, related items, etc.

} catch (NumberFormatException e) {
    IBEUtil.log("ibeCCtdItemDetail.jsp", "Could not parse item id="
        +lItemId);
} catch (ItemNotFoundException e) {
    IBEUtil.log("ibeCCtdItemDetail.jsp", "Could not load item id="+lItemId,
        Logger.ERROR);
}

```

```
        if (bItemLoaded)
        {
%>

<!-- body section
----->
<table border="0" width="100%">

<%
    if (IBEUtil.showPosting()) {
%>
    <!-- eMerchandising integration ----->
    <tr><td colspan="4" align="center">
<%    try {
%>
        <jsp:include page="ibapstng.jsp" flush="true" />
<%    } catch (Throwable e) {
        IBEUtil.log("ibeCctdItemDetail.jsp", "eMerchandising error",
Logger.ERROR);
    }
%>
    </td></tr>
<% } //end eMerchandising installed
%>
    <tr><td>&nbsp;</td>

<%
    if (IBEUtil.useFeature("IBE_USE_SECTION_PATH") &&
        !pathPage.equals(""))
    {
%>
        <td colspan="4" class="smallLink">
            <jsp:include page="<%=pathPage%>" flush="true" />
        </td>
<%    }
%>
    </tr>
    <tr><td valign="top"> &nbsp;</td>

    <!-- center column
----->
    <td valign="top" width="70%">
        <table border="0" cellpadding="0" cellspacing="0">
<!-- code to display item --%>
        </table>
    </td>
```

```

        <!-- right column
        ----->
        <td valign="top" width="20%">
            <table border="0" cellpadding="0" cellspacing="0">
<%-- code to display right bins --%>
            </table>
            <p>&nbsp;</p>
            <p>&nbsp;</p>
            </td></tr></table> <%-- end page table --%>
<% } // end item loaded
%>
<@@ include file="ibeCZzdBottom.jsp" %>
<!-- ibeCCtdItemDetail.jsp end -->

```

2. Modify the new item detail page as needed.

Retrieve the necessary item information using the Item APIs, which are described in *Oracle iStore API Reference Guide*.

Display the information as desired.

3. The template data setup will need to be modified. In the Store Administration UI, create a new logical template for the new item detail display page. Make sure that you create the template as one that displays products.
4. If the new item detail page should be used as the default template for a display context (such as STORE_PRODUCT_DETAILS), follow the steps in [Section D.5.3, "Using Display Styles for Default Display"](#), for map the new template to a display style.
5. To associate the new item detail template to the appropriate display style at the item level, follow the steps in [Section 7.5.7, "Setting Display Templates for Products"](#).
6. To associate the new item detail template to the appropriate display style at the category level, follow the steps in [Section D.5.4, "Configuring Product Presentation at the Category Level"](#).

Repeat this step for each applicable category.

D.5 Advanced Content Tasks

This section contains advanced tasks to assign content in your specialty stores.

Topics include:

- [Section D.5.1, "Creating New Content Components"](#)
- [Section D.5.2, "Assigning Media Objects to Content Components at the Store Level"](#)
- [Section D.5.3, "Using Display Styles for Default Display"](#)
- [Section D.5.4, "Configuring Product Presentation at the Category Level"](#)

See [Section 8.4, "Understanding Content Components"](#), for an introduction to content components.

D.5.1 Creating New Content Components

Use this procedure to create a new content component.

Steps

1. Log in to the Store Administration UI and select the **Advanced** tab. Select the **Content Components** subtab. The **Content Components** page displays a list of existing content components.

For a list of seeded content components, see [Section 8.4.1, "Seeded Content Components"](#).

2. Select the **Create Content Component** button. The **Create Content Component** page appears. Enter information about the content component into the following fields:
 - **Component Name** --- Enter a descriptive name for the content component. This name will not appear in the Customer UI.
 - **Programmatic Access Name** --- Enter a unique value in the textbox. This will be the value you enter into the Display Template call to the content component. An error message will display if you do not enter a unique name.
 - **Description** --- Optionally, enter a description for the content component. This description will not appear in the Customer UI, and is for your internal business purposes only.
 - **Class** --- Select a class for the content component, based on its display purpose. See [Section 8.3.2.1, "Seeded Content Component Classes"](#), for guidelines.
3. Press **Apply** to save changes. The screen refreshes, and now is called **Update Content Component**.

A new textbox field will appear, called **Default**, with a **Content** section below it. Since this is a new content component with no content mapped, then no information will display in the **Content** area. After you map content to the media object associated with the content component, the Content area will be populated, and the **View Mapping** and **Add Content** buttons will be active.

4. Map a media object to the content component: Select the flashlight icon to next to the **Default** textbox to launch the **Search and Select: Media Object** screen. Search for and select a media object to use with the content component.
 - For full steps, see [Section D.5.2, "Assigning Media Objects to Content Components at the Store Level"](#).
 - To understand the relationship between content components and media objects, see [Section 8.3, "Content Overview"](#).

Optionally, select the **Create Media Object icon** and create a new media object to associate with the content component. See [Section 8.5.3, "Creating New Media Objects"](#), for steps.

5. Map content to the media object at the product, section, or category level. See [Section 8.3, "Content Overview"](#), to begin understanding this process.
6. Create and register a new Display Template using the steps in [Section D.1.5, "Creating New Templates"](#), and [Section D.1.6, "Registering New Templates in the Template Manager"](#).
7. In the newly created Display Template, enter the programmatic access name of the new content component in the Display Manager API.

The figure below shows the **Create Content Component** screen.

Figure D–3 Create Content Component Screen

Create Content Component

Cancel

Apply

TIP

This is an advanced task. Custom content component requires customization of templates to understand the component. See the iStore implementation guide for details.

*

Indicates required field

*

Component Name

*

Programmatic Access Name

Description

*

Class

Section and Product

Section and Product

Product

Section

Cancel

Apply

D.5.2 Assigning Media Objects to Content Components at the Store Level

Use this procedure to assign media objects to content components at the store level. To understand media objects in iStore, begin with [Section 8.3, "Content Overview"](#).

You can assign content components to media objects at the Product or Section levels as well. See [Section 7.4, "Creating and Maintaining Sections"](#), for details.

Steps

1. Log in to the Store Administration UI and select the **Advanced** tab. Select the **Content Components** subtab. The **Content Components** page displays a list of existing content components.

For a list of seeded content components, see [Section 8.4.1, "Seeded Content Components"](#).
2. In the list, find the content component that you wish to map to a media object. Select the **Update** icon in the applicable content component row. The **Update Content Component** page appears.
3. In the **Default** field, select the flashlight icon to retrieve the **Search and Select: Media Object** page.

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Note: You can enter partial values in the Default textbox to narrow the results that are returned in the **Search and Select: Media Object** page when you select the flashlight icon; text entered should be based on media object name.

4. In the **Search and Select: Media Object** page, select the radio button of the media object you wish to map to the content component. Press the **Select** button to save the selection.

You will return to the **Update Content Component** page.

5. At the bottom of the **Update Content Component** page, the Content area allows you to map content files to the media object selected above.

If you haven't done so already, then map the media object you have selected to a source file or files. You can map content to media objects using the following navigation paths and steps:

- **Content > Media Objects:** See [Section 8.5.4, "Assigning Content Items to Media Objects"](#).
 - **Catalog > Sections > Content:** See [Section 7.4.5, "Adding Content to Sections"](#).
 - **Catalog > Products > Content:** See [Section 7.5.6, "Setting Content at the Product Level"](#).
6. To allow the media object to retrieve store-specific and/or language-specific content, in the **Content > Media Object** page, map the media object to different combination of stores and languages.

D.5.3 Using Display Styles for Default Display

Note: It is recommended that you use Display Templates instead of Display Styles for displaying product information in your specialty stores. See [Section 8.2, "Display Templates Overview"](#).

You can choose to display products inside a section template based on the Oracle Inventory category to which the products belong. While none of the out-of-the-box Display Templates use display styles, you can create your own custom section Display Template to use the Display Styles functionality. The custom section Display Template can be created so that each product under the section can be displayed differently --- based on its inventory category --- using a Display Style.

The default category set specified by the profile option, IBE: Category Set, contains your stores' product inventory. You can map each category from Oracle Inventory to a Display Style to present content at the category level.

If there are no item-level mappings to Display Styles, Oracle iStore checks for the category-level settings and uses them to display the product.

In Oracle iStore, the display styles functionality allows you to specify a style by which categories of products will display. This allows category-level default display of products in your stores. You can select product categories from within the category set mapped to the **IBE: Category Set** profile option. Default product display is determined by the display style only when no product-level display parameters are set.

Each display style maps to an Oracle iStore template, which then calls the appropriate template source file (JSP) for the store and language mapping.

When you create and save new display styles in the Display Styles tab, you choose store-level default display templates for them. These display styles then appear in the Products and Categories pages. In Products and Categories pages, you can choose a template name to correspond with each display style for a product or a category.

You also can create new Display Styles and register them in the Display Styles pages (in the Advanced tab). See: [Section D.5.3.4, "Creating Custom Display Styles"](#).

D.5.3.1 Enabling Display Styles

You must set the following profile option in order to enable the **Display Styles** pages in the Store Administration UI **Advanced** tab, and to be able to select display styles as defaults for product display in the **Catalog > Products** and the **Catalog > Sections** pages.

- **IBE: Enable Display Style** --- This profile option specifies whether display styles functionality is apparent in the Oracle iStore Store Administration UI. Set it to **Yes** at the iStore application level to enable the appearance of certain functionality which is described below. By default, this profile option is set to No.

When the profile option is set to **Yes**, the following occurs in the Store Administration UI:

1. In the **Advanced** tab, **Template Manager** subtab, the **Display Styles** hyperlink appears. You select the Display Styles hyperlink to access the Display Styles page.

The **Display Styles** page lists all display styles in your implementation. It also allows access to other pages where you can add and update display styles.

2. In the **Catalog** pages, within the **Products** subtab, **Use Display Styles** is selectable as a display option for products in the **Select a Display Template** LOV.
3. In the **Catalog** pages, within the **Sections** subtab, **Use Display Styles** is selectable as a display option for sections in the **Select a Display Template** LOV.

D.5.3.2 How Customer UI Pages Display Products with Display Style Mappings

When a Customer UI page displays a product using a particular display style, Oracle iStore selects the appropriate template as follows:

1. If there is a product-specific template for the given display style, then the product-specific template is used.
2. If no mapping is specified at the product level, and there is a category-specific template, then the category-specific template is used.
3. 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.

Note: Product-level (item-level) configurations override category-level and store-level settings.

D.5.3.3 Seeded Display Styles

When Oracle iStore ships, five seeded display styles are already set up. In the Store Administration UI, select **Advanced > Template Manager > Display Styles** to view seeded display styles.

The table below, *Seeded Display Styles and Default Template Mappings*, shows the seeded display styles and the display templates that they map to out-of-the-box.

Table D–2 Seeded Display Styles and Default Display Template Mappings

Name	Programmatic Access Name	Default Display Template Name and
		Prog. Access Name
Featured Product	STORE_FEATURED_PRODUCT	Catalog - Featured Product STORE_CTLG_FEATURED_ITEM (ibecfitm.jsp)
Product Detail	STORE_PRODUCT_DETAIL	Product Detail STORE_CTLG_ITEM_DETAIL (ibecitmd.jsp)
Product Small Description	STORE_PRODUCT_SMALL_DESCR	Catalog - Product Small Description STORE_CTLG_LEAF_ITEM (ibeclitm.jsp)
Product Details	STORE_PRODUCT_DETAILS	Catalog - Product Details STORE_CTLG_ITEM_DETAILS (ibeCCtdItemDetail.jsp)
Product Description	STORE_PRODUCT_DESCR	Catalog - Product Description STORE_CTLG_LEAF_ITEM_INCL (ibeCCtdLeafItem.jsp)

D.5.3.4 Creating Custom Display Styles

Use the following procedure to create additional display styles beyond those provided out-of-the-box.

Prerequisites

- Since each display style must be mapped to a template, for new display styles, you must first register the applicable templates in the **Advanced > Template Manager** pages. If the template 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 category with that display style and it is not specified, Oracle iStore 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 **Advanced tab > Display Styles** hyperlink.
- Enable Display Styles functionality by setting the profile option, **IBE: Enable Display Style**, to Yes at the iStore application level.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI.
2. Select the **Advanced** tab and then the **Template Manager** subtab.
3. Select the **Display Styles** hyperlink. The Display Styles page displays a list of existing display styles.

In the **Display Styles** page you can:

- View all display styles in your implementation.
 - Delete non-seeded display styles.
 - Access the **Create Display Style** and **Update Display Style** pages, where you can create new display styles and update existing ones.
4. Select **Create Display Style**. The **Create Display Style** page opens.
 5. Enter the following information for the display style:
 - a. **Name** --- Enter a name for the display style. This will be the name used internally by your organization.
 - b. **Programmatic Access Name** --- Enter a unique alphanumeric programmatic access name for the display style. The iStore template associated with the display style use this programmatic access name to call the display style.
 - c. **Description** --- Enter a description for the display style if desired.
 - d. **Default Template** --- Use the flashlight icon to search for and select the default template to use with this display style.
 6. Select **Apply** to save changes.

D.5.4 Configuring Product Presentation at the Category Level

Every product in the product catalog is mapped to a category in Oracle Inventory. Using media, display templates, and display styles, you can configure category-level defaults for product display.

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).

Prerequisites

- Required implementation tasks have been performed, as described in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).
- Products have been implemented. **See:** [Chapter 6, "Implementing Products"](#).
- The profile option, **IBE: Display Style Enabled**, has been set to **Yes** at the iStore application level.

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

D.5.4.1 Steps to Map Category-Level Default Templates

1. Launch the Store Administration UI and select the **Advanced** tab. Select the **Categories** subtab. The **Categories** page displays, showing a list of all categories within the default category set specified by the profile option, **IBE: Category Set**, along with related display templates, display styles, and media objects.
2. Optionally, in the **Categories** page, search for categories by **Category Code** or **Category Description**.
3. Select the radio button of the category you want to update. Select the **Assign Templates** button.

The **Category Details: Assign Display Templates** page lists all seeded display styles and any mapped, category-level templates.

4. In the **Category Details: Assign Display Templates** page, to map a display style at the category-level to a new template, select the flashlight icon next to the appropriate display style.

The **Search and Select: Template** page appears. By default, this page will only display templates which are meant to be used to display products.

5. In the **Search and Select: Template** page, select the **radio button** of an appropriate template, and press the **Select** button to save changes.
6. The **Category Details: Assign Display Templates** page re-appears with the template column populated with the template you have chosen.
7. To save changes, press **Apply**.

In store pages related to this category that use a given display style, this template overrides the display style default template.

D.5.4.2 Steps to Map Category-Level Default Media Objects

1. Launch the Store Administration UI and select the **Advanced** tab. Select the **Categories** subtab. The **Categories** page displays, showing a list of all categories within the default category set specified by the profile option, IBE: Category Set, along with related display templates, display styles, and media objects.
2. Optionally, in the **Categories** page, search for categories by **Category Code** or **Category Description**.

3. Select the radio button of the category you want to update. Select the **Assign Content** button.

The **Category Details: Assign Media Objects** page lists all seeded content components and any mapped, category-level media objects.

4. In the **Category Details: Assign Media Objects** page, to map a content components at the category-level to a new media object, select the flashlight icon next to the appropriate content component.

The **Search and Select: Media Object** page appears. By default, this page will only display media objects which are meant to be used to display products.

5. In the **Search and Select: Media Object** page, select the **radio button** of an appropriate media object, and press the **Select** button to save changes.
6. The **Category Details: Media Objects** page re-appears with the media object column populated with the media object you have chosen.

7. The media object will be used for default display of products within the Inventory category you mapped it to.

D.6 Configuring Bins

You can change the look and feel of the catalog and shopping cart pages by modifying their bin layouts. The seeded pages are divided into bins. Several bins display the content of seeded JSPs. The catalog and shopping cart pages also have bins without seeded source files. You can associate these bins with custom source files to customize the pages' appearance.

Each bin is listed as a separate logical template in the Oracle iStore template manager.

You can change the bin placement or content in the following ways:

- Change the profile options that are related to the catalog bins. **See:** [Section A.12, "Customer UI Section and Item Display Profile Options"](#).
- Associate JSPs with the seeded logical bin templates. **See:** [Section D.1.2, "Template Customization Tasks"](#).

You can perform the following tasks by configuring bins:

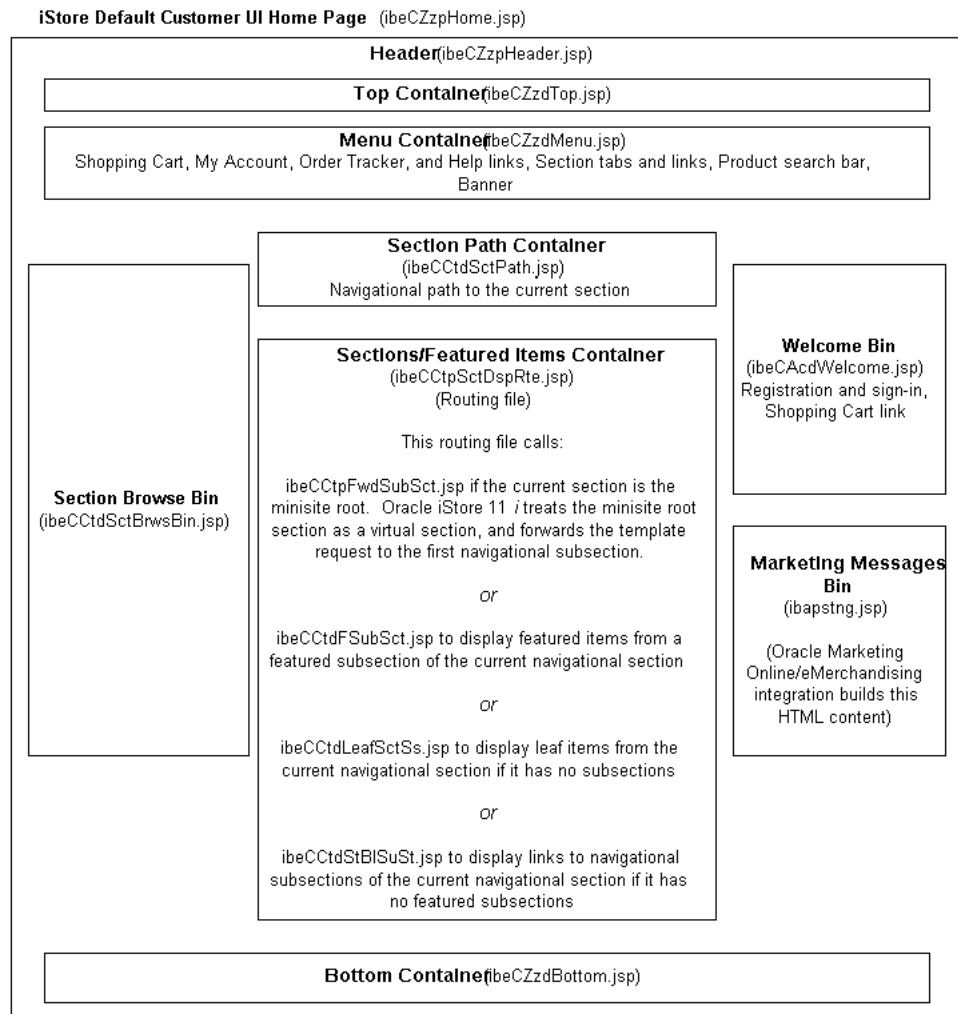
- [Section D.6.2, "Configuring Section Layout with Bins"](#)
- [Section D.6.3, "Configuring Item Layout with Bins"](#)
- [Section D.6.4, "Configuring Shopping Cart Page Bins"](#)

The Oracle iStore Customer UI pages are sectioned into several information containers, referred to as bins or placeholders. These bins hold the content-specific information and display it logically on the page.

Note: Be careful when making changes which affect the specialty stores.

D.6.1 Default Bins on Store Home Page

The following diagram shows the layout of the bins on the default Store Home Page.

Figure D–4 Bin Layout on the Default Store Home Page

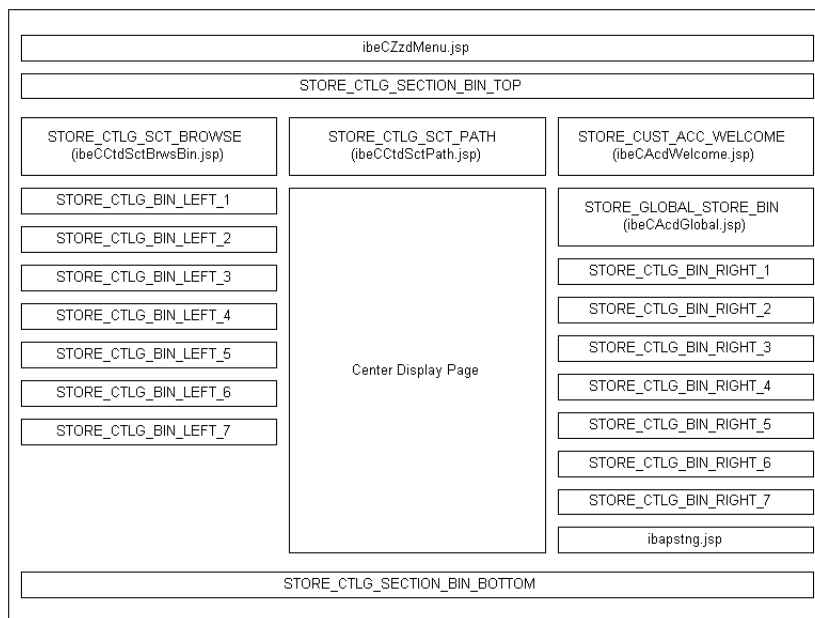
D.6.2 Configuring Section Layout with Bins

All seeded section templates share the same layout. You can configure the common section layout through profile option settings and template setup.

D.6.2.1 Default Bin Layout for Sections

The following figure shows the common section layout.

Figure D–5 Default Section Bins Layout



D.6.2.2 Section Bins Without Seeded Source Files

The following bins have no seeded source files and can be associated with seeded or custom JSPs to customize page appearance:

- STORE_CTLG_BIN_LEFT_1
- STORE_CTLG_BIN_LEFT_2
- STORE_CTLG_BIN_LEFT_3
- STORE_CTLG_BIN_LEFT_4
- STORE_CTLG_BIN_LEFT_5
- STORE_CTLG_BIN_LEFT_6
- STORE_CTLG_BIN_LEFT_7
- STORE_CTLG_BIN_RIGHT_1

- STORE_CTLG_BIN_RIGHT_2
- STORE_CTLG_BIN_RIGHT_3
- STORE_CTLG_BIN_RIGHT_4
- STORE_CTLG_BIN_RIGHT_5
- STORE_CTLG_BIN_RIGHT_6
- STORE_CTLG_BIN_RIGHT_7
- STORE_CTLG_SECTION_BIN_TOP
- STORE_CTLG_SECTION_BIN_BOTTOM

D.6.2.3 Managing Section Page Bins Through Profile Options

You can use the following profile options to enable or disable the section page bins:

- **IBE: Use Global Bin**
- **IBE: Use Section Bin**
- **IBE: Use Section Path**
- **IBE: Use Welcome Bin**

For each of these, a **Yes** value indicates the specified bin is displayed in its default location. If the value is **No**, the specified bin is not displayed.

D.6.2.4 Configuring Section Bins Using Template Setup

You can modify the section page layout through template setup by adding template mappings for:

- STORE_CTLG_BIN_LEFT_1-7
- STORE_CTLG_BIN_RIGHT_1-7
- STORE_CTLG_SECTION_BIN_TOP
- STORE_CTLG_SECTION_BIN_BOTTOM

Log in to the Store Administration UI and add the necessary logical to physical template mappings for the desired template (for example, STORE_CTLG_BIN_LEFT_1). In the Template Details page, add a new source file for the bin content.

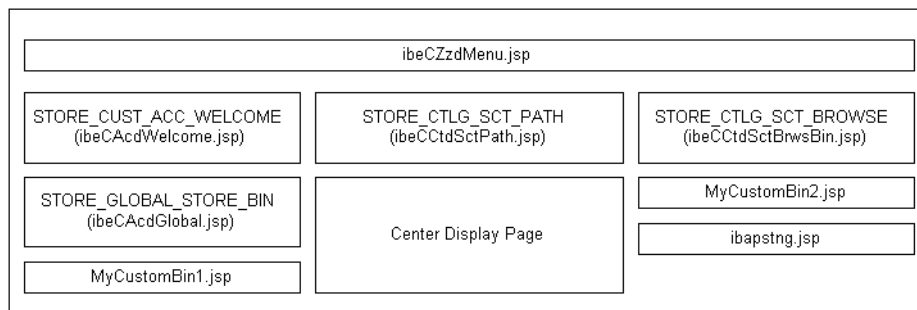
Add the necessary mappings for the desired store-language combinations. To use this source file for all stores and all languages, add a mapping for all stores, all

languages. The changes will not be overwritten when patches are applied because there are no seeded default values for these bins.

Example 31–1 Configuring Section Layout with Bins

This example provides a guideline for configuring the section layout with profile option settings and template setup, and steps for creating the custom layout shown below.

Figure 31–1 Configured Section Layout Example



Steps

1. In Oracle Forms, set the profile option **IBE: Use Section Bin** to **No**.
2. In Oracle Forms, set the profile option **IBE: Use Section Path** to **Yes**.
3. In Oracle Forms, set the profile option **IBE: Use Global Bin** to **No**.
4. In Oracle Forms, set the profile option **IBE: Use Welcome Bin** to **No**.
5. In the Store Administration UI, create a mapping from STORE_CTLG_BIN_LEFT_1 to ibeCAcdWelcome.jsp.
6. In the Store Administration UI, create a mapping from STORE_CTLG_BIN_LEFT_2 to ibeCAcdGlobal.jsp.
7. In the Store Administration UI, create a mapping from STORE_CTLG_BIN_LEFT_3 to MyCustomBin1.jsp.
8. In the Store Administration UI, create a mapping from STORE_CTLG_BIN_RIGHT_1 to ibeCCtdSctBrwsBin.jsp.
9. In the Store Administration UI, create a mapping from STORE_CTLG_BIN_RIGHT_2 to MyCustomBin2.jsp.

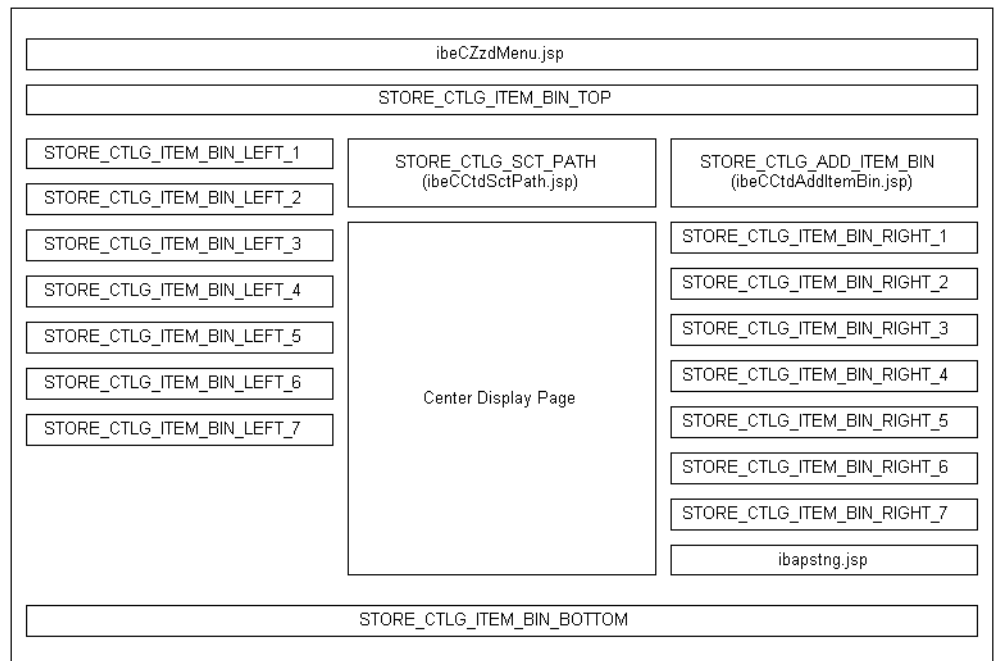
D.6.3 Configuring Item Layout with Bins

All seeded item templates share the same layout. You can customize the common item layout through profile option settings and template setup.

D.6.3.1 Default Bin Layout for Items

The following figure shows the default bin layout for items.

Figure D–6 Default Item Bins Layout



D.6.3.2 Item Bins Without Seeded Source Files

The following bins have no seeded source files and can be associated with seeded or custom JSPs to customize page appearance:

- `STORE_CTLG_ITEM_BIN_LEFT_1`
- `STORE_CTLG_ITEM_BIN_LEFT_2`
- `STORE_CTLG_ITEM_BIN_LEFT_3`

- STORE_CTLG_ITEM_BIN_LEFT_4
- STORE_CTLG_ITEM_BIN_LEFT_5
- STORE_CTLG_ITEM_BIN_LEFT_6
- STORE_CTLG_ITEM_BIN_LEFT_7
- STORE_CTLG_ITEM_BIN_RIGHT_1
- STORE_CTLG_ITEM_BIN_RIGHT_2
- STORE_CTLG_ITEM_BIN_RIGHT_3
- STORE_CTLG_ITEM_BIN_RIGHT_4
- STORE_CTLG_ITEM_BIN_RIGHT_5
- STORE_CTLG_ITEM_BIN_RIGHT_6
- STORE_CTLG_ITEM_BIN_RIGHT_7
- STORE_CTLG_ITEM_BIN_TOP
- STORE_CTLG_ITEM_BIN_BOTTOM

D.6.3.3 Managing Item Page Bins Through Profile Options

You can use the following profile options to enable or disable the item page bins:

- **IBE: Use Add Item Bin**
- **IBE: Use Section Path**

For each of these, a **Yes** value indicates the specified bin is displayed in its default location. If the value is **No**, the specified bin is not displayed.

D.6.3.4 Configuring Item Page Bin Content Using Template Setup

You can modify the item page layout through template setup by adding template mappings for:

- STORE_CTLG_ITEM_BIN_LEFT_1-7
- STORE_CTLG_ITEM_BIN_RIGHT_1-7
- STORE_CTLG_ITEM_BIN_TOP
- STORE_CTLG_ITEM_BIN_BOTTOM

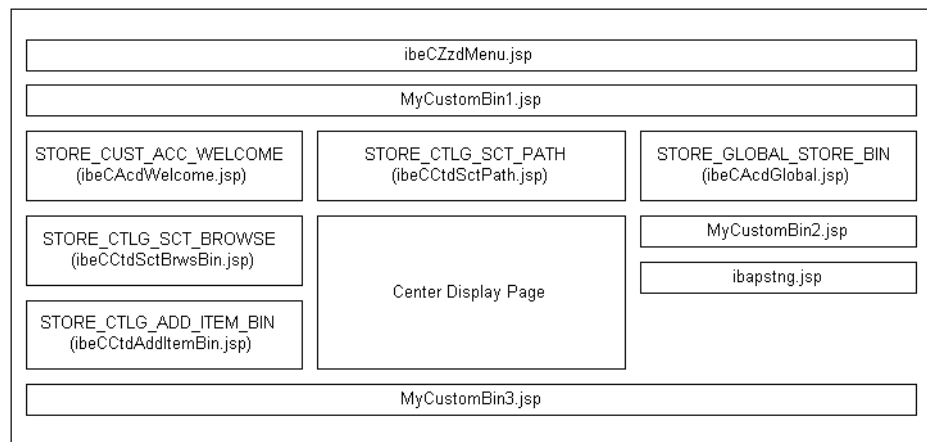
Log in to the Store Administration UI and add the necessary logical to physical template mappings for the desired template (for example, STORE_CTLG_ITEM_

BIN_LEFT_1). In the Template Details page, add a new source file for the bin content. 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.

Example 31–2 Configuring Item Layout with Bins

This example provides a guideline for customizing the item layout with profile option settings and template setup, and steps for creating the custom layout shown below.

Figure 31–2 Configured Item Layout Example



Steps

1. In Oracle Forms, set the profile option **IBE: Use Add Item Bin** to **No**.
2. In Oracle Forms, set the profile option **IBE: Use Section Path** to **Yes**.
3. In the Store Administration UI, create a mapping from **STORE_CTLG_ITEM_BIN_TOP** to **MyCustomBin1.jsp**.
4. In the Store Administration UI, create a mapping from **STORE_CTLG_ITEM_BIN_LEFT_1** to **ibeCAcdWelcome.jsp**.
5. In the Store Administration UI, create a mapping from **STORE_CTLG_ITEM_BIN_LEFT_2** to **ibeCCtdSctBrwsBin.jsp**.

6. In the Store Administration UI, create a mapping from STORE_CTLG_ITEM_BIN_LEFT_3 to ibeCCtdAddItemBin.jsp.
7. In the Store Administration UI, create a mapping from STORE_CTLG_ITEM_BIN_RIGHT_1 to ibeCAcdGlobal.jsp.
8. In the Store Administration UI, create a mapping from STORE_CTLG_ITEM_BIN_RIGHT_2 to MyCustomBin2.jsp.
9. In the Store Administration UI, create a mapping from STORE_CTLG_ITEM_BIN_BOTTOM to MyCustomBin3.jsp.

D.6.4 Configuring Shopping Cart Page Bins

All seeded shopping cart templates share the same layout. The shopping cart page layout has a top bin and a bottom bin, which are listed as logical templates in the Oracle iStore template manager. There also are seven bins along the left side of the shopping cart page, and seven bins along the right side. None of these bins has a JSP file associated, out-of-the-box.

You can configure the content of a bin by mapping a JSP to the logical template. For example, you can include Oracle Marketing's eMerchandising banners at the top and bottom of the shopping cart pages.

The top and bottom shopping cart bins have the following programmatic access names:

- STORE_CART_ITEMS_BIN_TOP — The top shopping cart bin
- STORE_CART_ITEMS_BIN_BOTTOM — The bottom shopping cart bin

The left and right shopping cart bins have the following programmatic access naming conventions:

- STORE_CART_BIN_LEFT<bin numbers 1-7> --- The seven left-side bins
- STORE_CART_BIN_RIGHT<bin numbers 1-7> --- The seven right-side bins

Note: Normally, the Global Bin displays on the Store Home Page. If you map the Global Bin (which displays a currency picker) into the shopping cart page, then changing currency in the shopping cart page will affect the existing cart. When the user selects a different currency from the bin, the cart items are repriced in the newly selected currency. For more information on the Global Bin, see [Section 5.4.3, "Global Bin on Store Home Page"](#).

Use the following procedure to configure content for the shopping cart bins.

Prerequisites

None

Responsibility

iStore Administrator

Navigation

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and select the **Advanced** tab. Select the **Templates** subtab.
2. Select the name of the bin template 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 store-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.

D.7 Advanced Product Relationships Procedures

This section contains information on advanced tasks surrounding product relationships. General information on relationships can be found in [Section 7.6, "Using Product Relationships"](#).

Topics include:

- [Appendix D.7.1, "Building Relationships Using Other than the Related Type"](#)
- [Appendix 31.4.2, "Seeded Relationship Types"](#)
- [Appendix D.7.2, "Creating New Relationship Types"](#)
- [Appendix D.7.3, "Creating Relationships Using SQL Rules"](#)

D.7.1 Building Relationships Using Other than the Related Type

If you use any relationship type other than the seeded, supported relationship type **Related**, you must customize the Oracle iStore JSPs to retrieve the related items with the Java API:

```
oracle.apps.ibe.catalog.Item.getRelatedItems().
```

This method can retrieve related items of 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.

- See *Oracle Inventory User's Guide* for details on how to set up and use Oracle Inventory.

31.4.2 Seeded Relationship Types

Use the following Oracle iStore seeded relationship types build relationships:

31.4.2.1 Seeded Relationship Types

Below are the Oracle iStore's seeded relationship types:

- **Collateral** --- Entity B is collateral (e.g., marketing brochures) that exists for entity A
- **Complimentary** --- Entity B is available free of charge with entity A
- **Conflict** --- Entity A is not usable together with a related entity B
- **Cross-Sell** --- Entity B can be offered and sold along with entity A
- **Impact** --- Entity A is usable together with related entity B, but only under certain conditions
- **Mandatory Charge**
- **Optional Charge**
- **Prerequisite** --- Customer must have entity B before purchasing entity A, or related product/event must be possessed/attended beforehand
- **Promotional Upgrade** --- Entity A ordered by customer is upgraded to entity B of equal or higher value, with no change in price.

- **Related** --- Entity B is related to entity A
- **Service** --- Entity B is a service item that can be added to cart for a serviceable entity A
- **Substitute** --- Entity B can be substituted for entity A
- **Superseded** --- Entity B supersedes entity A, which is no longer available
- **Up-Sell** --- A newer version, entity B, can be sold instead of entity A

D.7.2 Creating New Relationship Types

Use this procedure to define new relationship types.

Prerequisites

Products must exist in Oracle Inventory.

Login

Oracle E-Business Suite HTML login

Responsibility

iStore Administrator

Steps

1. Log in to the Store Administration UI and select the **Catalog** tab. Select the **Relationships** subtab. The **Relationships** page displays a summary of all relationships types in your organization's implementation.

Seeded relationship types will have a **Remove** icon that is grayed out.
Non-seeded relationship types will display a viable **Remove** icon next to them for removal of the relationship type.
2. Select **Create Relationship**. The Create Relationship page opens.
3. In the **Name** field, enter the relationship type name.
4. In the Description field, enter a description. This is an optional field.
5. In the **Effective Date From** field, select a start date for the relationship type.
6. Optionally, in the **Effective Date To** field, select an expiration date for the relationship type.

7. Select **Apply**. The relationship type has been created. The Relationship Detail page opens, where you can begin adding rules to the relationship type.
8. Select **Create Mapping Rules** to use Oracle iStore rule builder, and follow the steps in [Section 7.6.1, "Creating Relationships Using Mapping Rules"](#).

Or select **Create a SQL Rule** to specify an SQL query. See [Section D.7.3, "Creating Relationships Using SQL Rules"](#), for instructions.

D.7.3 Creating Relationships Using SQL Rules

The SQL method of creating relationship rules in Oracle iStore is used in place of the mapping rules by highly technical personnel with knowledge of SQL. Most store managers will use the mapping rules.

Note: You cannot use Relationship rules created using the Oracle iStore rule builder and the SQL rules together for the same relationship.

Caution: If you set up an SQL rule with a relationship type, you cannot delete it.

If a relationship is driven from an SQL rule type, the SQL statement is executed at runtime to get the actual item-level relationships. The SQL query can have up to 10 bind variables (and unlike the mapping rules, SQL Rules are not pre-evaluated). These SQL queries are executed at runtime using the input parameters supplied from the JSP page.

Example 31–3 SQL Relationship Rules Example:

A customer is selling books on his web store and has set up the attribute1 in the DFF segment of mtl_system_items_b as the author of the book. By defining an SQL type relationship he wants to retrieve all the books belonging to the same author. Here is his sample SQL rule:

```
SELECT msi2.inventory_item_id
FROM    mtl_system_items_b msi1, mtl_system_items_b msi2
WHERE   msi1.organization_id = msi2.organization_id
AND     msi1.attribute1 = msi2.attribute1
AND     msi1.inventory_item_id = :item_id
AND     msi1.organization_id = :organization_id
```

During runtime, when the value for the bind variable(s) is passed in, the SQL type relationship will retrieve all the items (books) whose author is the same as the item (book) being displayed.

Use the following procedure to create relationships using either the seeded relationship types or types you have created.

Prerequisites

- Required implementation tasks have been performed, as described in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).
- Products and related category structures must be set up in Oracle Inventory before they can be imported into Oracle iStore. See *Oracle Inventory User's Guide* for details.
- Products in Oracle Inventory must have the required flags set as described in [Section 6.3.4, "Required Inventory Flags for Oracle iStore Products"](#).

Responsibility

iStore Administrator

Login

Oracle E-Business Suite HTML login

Steps

1. Launch the Store Administration UI and select the **Catalog** tab. Select the **Relationship** subtab.

Seeded relationship types will have a **Remove** icon that is grayed out. *Non-seeded* relationship types will display a viable **Remove** icon next to them for removal of the relationship type.
2. In the **Search for Relationship by Name** textbox, enter the relationship type name; select **Go** to launch the search. Or, scroll through the list of relationship types and find the relationship type.
3. Select the **Update** icon for the Related relationship type. The **Relationship Details** page appears.
4. Select **Create a SQL Rule**.

Caution: If you set up an SQL rule with a relationship type, you cannot delete it.

- 5. In the **SQL Rule textbox**, enter your SQL rule. For products in Oracle Inventory, retrieve the inventory_item_id column in the MTL_SYSTEM_ITEMS table.
- 6. Optionally, select **Validate** to validate the SQL statement before saving as a relationship rule.
Note: This will validate the SQL syntax but not the SQL content.
- 7. Select **Apply** to save changes.

D.8 Creating Deep Links

When advertising your specialty stores and products in e-mails and web sites, you can provide deep links from the advertisement to your store. When users click a deep link, they are automatically directed to the appropriate target page. Possible target pages include, but are not limited to, the following:

- A store home page
- A section page
- An item detail page
- A shopping cart
- Addition of items to a shopping cart
- A published quote
- The login and registration page

A deep link’s URL points to the entry page ibeCZzpEntry.jsp. To the URL, you append specific parameters that are either required or optional, depending on the deep link target and your Oracle iStore setups. The parameters enable redirection of the user to the intended target page. The following table describes the target page information specified by these parameters.

Table D–3 Deep Link Parameters

Parameter Data	Description
Minisite ID or access name	The target specialty store
Responsibility ID	The responsibility that should be assigned to the user
Language	The display language
Section ID	A section within a specialty store
Item ID	An item, to display its detail page or add it to a shopping cart

Table D–3 Deep Link Parameters (Cont.)

Parameter Data	Description
Shopping cart	A shopping cart with or without items
Quote ID	A published quote's number
Contract number	A published quote's contract number
UOM	The UOM of an item being added to a shopping cart
Quantity	The item quantity being added to a shopping cart
Promotion code	A promotion or offer code, to be applied at line level
Marketing source	An Oracle Marketing marketing source code ID, to be set at line level
User name	The user name for login
Password	The password for login
Affiliate	The affiliate that posted the deep link
Source URL	The URL where the deep link was posted
Source e-mail	The e-mail address to which the deep link was sent
Party	The party ID of the registered user who received the deep link
Marketing campaign	The marketing campaign using the deep link
Merchant-definable parameters	Ten parameters that you can define to capture other information in the deep link URL

Use the following procedure to create a deep link.

Prerequisites

None

Login

None

Responsibility

None

Steps

1. Create a deep link URL that uses the following syntax:

```
http://<domain name>/<directory path>/ibeCZzpEntry.jsp?<go
parameter>&<destination parameters>&<globalization parameters>&<tracking
parameters>
```

<go parameter> and <destination parameters> specify the link’s destination. See [Table D-4](#) for supported values.

<globalization parameters> specify specialty store, responsibility, and language information. See [Table D-5](#) for supported values.

<tracking parameters> specify link tracking information. See [Table D-6](#) for supported values.

- 2. Include the deep link in an e-mail, Web site advertisement, or any other appropriate location.

Guidelines

The following table lists the supported values for the go parameter and destination parameters, which together specify the deep link’s destination. The parameters are required unless otherwise stated.

Table D-4 Parameters for Destinations

Destination	<go parameter>	<destination parameters>
Specialty store home page ¹	go=catalog	None
Section page	go=section	section=<section ID>
Item detail page	go=item	item=<item ID>&section=<section ID> The section parameter is optional.
Shopping cart	go=cart	None
Quote	go=quote	quote=<quote ID>&contract=<contract number> The contract parameter is optional.
Add one item to a shopping cart	go=buy	item=<item ID>&qty=<quantity>&uom=<UOM>&promotion=<promotion code> &msource=<marketing source code ID>&ref=<referrer URL> The promotion, msource, and ref parameters are optional. The ref parameter specifies the JSP to redirect the user to after adding the item to the cart.

Table D–4 Parameters for Destinations (Cont.)

Destination	<go parameter>	<destination parameters>
Add multiple items to a shopping cart ²	go=buy	item_0=<item ID>&qty_0=<quantity> &uom_0=<UOM>&promotion_0=<promotion code>&msource_0=<marketing source code ID>&item_1=<item ID>&qty_1=<quantity>&uom_1=<UOM>&promotion_1=<promotion code>&msource_1=<marketing source code ID> ... &num=<number of line items>&ref=<referrer URL> Use the sequential numbering convention in this example, beginning with item_0. The promotion, msource, and ref parameters are optional. The ref parameter specifies the JSP to redirect the user to after adding the items to the cart.
Autologin user	go=login	username=<username>&password=<password>&ref=<referrer> The ref parameter is optional. It specifies the JSP to redirect the user to after login. If the parameter is not set, the user is redirected to the specialty store home page.
Sign in or register user	go=signin	ref=<referrer> The ref parameter is optional. It specifies the JSP to redirect the user to after login. If the parameter is not set, the user is redirected to the specialty store home page.
Other pages	go=<JSP name>	None

¹ The home page of the specialty store in the site parameter. If the site parameter is not specified, the user is directed to the default specialty store’s home page. See Table D–5 for details about the site parameter.

² When creating a deep link that adds multiple items to a shopping cart, you cannot include model bundles or configurable products.

The following table lists the globalization parameters and their supported values. Globalization parameters are optional unless otherwise stated.

Table D–5 Parameters for Globalization Data

Globalization Data	<globalization parameters>
Specialty Store	site=<minisite ID or access name> The site parameter is mandatory if the profile option IBE: Default Specialty Store is not defined.
Responsibility	respid=<responsibility ID>
Display language	language=<language code> The deep link defaults to the specialty store’s default language if the language parameter is not set.

The following table lists the tracking parameters and their supported values. Tracking parameters are optional.

Table D–6 Parameters for Tracking Data

Tracking Data	<tracking parameters>
The affiliate that posted the deep link	affiliate=<affiliate code>
Marketing campaign	campaign=<campaign code>
The party ID of the registered user to whom the deep link was e-mailed	party=<party ID>
The e-mail address to which the deep link was sent	src_email=<source e-mail>
The URL where the deep link was posted	src_url=<source URL>
Merchant-definable parameters	param0=<parameter> ... param9=<parameter> You can define the ten parameters param0 through param9 to meet other tracking needs.

Example D–2 Deep Link for Buying One Item

The following deep link adds an item to the user’s active shopping cart:

https://oraclestore.oracle.com/OA_HTML/ibeCZzpEntry.jsp?go=buy&item=293947&qty=1

This deep link redirects the user to the URL:

https://oraclestore.oracle.com/OA_HTML/ibeCCTpBuyRoute.jsp?item=293947&qty=1

This page is the user's active shopping cart, with one unit of the Oracle Database Enterprise Edition (item ID 293947) added. The active shopping cart also holds any items that the user has previously added.

D.9 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*.

Display Templates and Media Objects

This appendix lists the Oracle iStore 11*i* seeded Display Templates.

For an overview of how Oracle iStore uses Display Templates to present the Customer UI, see [Section 8.2.1, "Display Templates Present the Customer UI"](#).

Main topics in this appendix include:

- [Catalog Display Templates](#)
- [Product Search Display Templates](#)
- [Shopping Cart Display Templates](#)
- [Shopping List Display Templates](#)
- [Checkout Display Templates](#)
- [Express Checkout Display Templates](#)
- [Postsales Display Templates](#)
- [Available to Promise Display Templates](#)
- [Oracle Configurator Integration Display Templates](#)
- [User Management Display Templates](#)
- [Reports and Bins Display Templates](#)
- [Other Display Templates](#)
- [Media Objects](#)

Note: Some of the programmatic access names do not have seeded source files. You can map your own customized source files to these names in the same way that you would map a source file to any template programmatic access name.

E.1 Catalog Display Templates

The following table, Catalog Template Mappings, lists the seeded Display Templates for the Customer UI Catalog.

Table E–1 Catalog Display Templates

Name	Prog. Access Name	Source File	Description
Catalog bins			
Add Item Bin	STORE_CTLG_ADD_ITEM_BIN	ibeCCtdAddItemBin.jsp	Add Item Bin
Bin Left 1	STORE_CTLG_BIN_LEFT_1	none	Bin Left 1
Bin Left 2	STORE_CTLG_BIN_LEFT_2	none	Bin Left 2
Bin Left 3	STORE_CTLG_BIN_LEFT_3	none	Bin Left 3
Bin Left 4	STORE_CTLG_BIN_LEFT_4	none	Bin Left 4
Bin Left 5	STORE_CTLG_BIN_LEFT_5	none	Bin Left 5
Bin Left 6	STORE_CTLG_BIN_LEFT_6	none	Bin Left 6
Bin Left 7	STORE_CTLG_BIN_LEFT_7	none	Bin Left 7
Bin Right 1	STORE_CTLG_BIN_RIGHT_1	none	Bin Right 1
Bin Right 2	STORE_CTLG_BIN_RIGHT_2	none	Bin Right 2
Bin Right 3	STORE_CTLG_BIN_RIGHT_3	none	Bin Right 3
Bin Right 4	STORE_CTLG_BIN_RIGHT_4	none	Bin Right 4
Bin Right 5	STORE_CTLG_BIN_RIGHT_5	none	Bin Right 5
Bin Right 6	STORE_CTLG_BIN_RIGHT_6	none	Bin Right 6
Bin Right 7	STORE_CTLG_BIN_RIGHT_7	none	Bin Right 7
Item Bin Bottom	STORE_CTLG_ITEM_BIN_BOTTOM	none	Item Bin Bottom

Table E–1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Item Bin Left 1	STORE_CTLG_ITEM_BIN_LEFT_1	none	Item Bin Left 1
Item Bin Left 2	STORE_CTLG_ITEM_BIN_LEFT_2	none	Item Bin Left 2
Item Bin Left 3	STORE_CTLG_ITEM_BIN_LEFT_3	none	Item Bin Left 3
Item Bin Left 4	STORE_CTLG_ITEM_BIN_LEFT_4	none	Item Bin Left 4
Item Bin Left 5	STORE_CTLG_ITEM_BIN_LEFT_5	none	Item Bin Left 5
Item Bin Left 6	STORE_CTLG_ITEM_BIN_LEFT_6	none	Item Bin Left 6
Item Bin Left 7	STORE_CTLG_ITEM_BIN_LEFT_7	none	Item Bin Left 7
Item Bin Right 1	STORE_CTLG_ITEM_BIN_RIGHT_1	none	Item Bin Right 1
Item Bin Right 2	STORE_CTLG_ITEM_BIN_RIGHT_2	none	Item Bin Right 2
Item Bin Right 3	STORE_CTLG_ITEM_BIN_RIGHT_3	none	Item Bin Right 3
Item Bin Right 4	STORE_CTLG_ITEM_BIN_RIGHT_4	none	Item Bin Right 4
Item Bin Right 5	STORE_CTLG_ITEM_BIN_RIGHT_5	none	Item Bin Right 5
Item Bin Right 6	STORE_CTLG_ITEM_BIN_RIGHT_6	none	Item Bin Right 6
Item Bin Right 7	STORE_CTLG_ITEM_BIN_RIGHT_7	none	Item Bin Right 7
Item Bin Top	STORE_CTLG_ITEM_BIN_TOP	none	Item Bin Top
Section Bin Bottom	STORE_CTLG_SECTION_BIN_BOTTOM	none	Section Bin Bottom
Section Bin Top	STORE_CTLG_SECTION_BIN_TOP	none	Section Bin Top

Table E–1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Catalog Section Browse	STORE_CTLG_SCT_BROWSE	ibeCCtdSctBrwsBin.jsp	Display catalog hierarchy for browsing
Catalog display pages, routing pages, and templates			
Specialty Store Display Page	STORE_CTLG_MSITE_DISPLAY	ibeCCtdMinisites.jsp	Specialty Store Display Page
Store Content Center Page	STORE_CTLG_CT_CONTENT	ibeCCtdContentI.jsp	Store Content Center Page
Catalog section display routing	STORE_CTLG_SCT_ROUTE	ibeCCtpSctDspRte.jsp	Display routing page; see Section D.2.1.1, "Section Routing Page"
Catalog buy routing	STORE_CTLG_BUY_PROCESS_ROUTE	ibeCCtpBuyRoute.jsp	Routing page for add to cart express checkout etc
Catalog item route	STORE_CTLG_ITEM_ROUTE	ibeCCtpItmDspRte.jsp	Item display routing
Catalog Section Path	STORE_CTLG_SCT_PATH	ibeCCtdSctPath.jsp	Display path traversed in hierarchy
Catalog section common page	STORE_CTLG_SCT_COMMON	ibeCCtdCmnSt.jsp	Common display page with bins center page menu etc.; see Section D.2.1.2, "Common Section Display Page"
Catalog bullet sections	STORE_CTLG_BULLET_SCT	ibeCCtdBltSts.jsp	List of sections in two columns with bullets
Catalog Section Forward to Subsection page	STORE_CTLG_FSUBSCT_FWD	ibeCCtpFwdSubSct.jsp	Display featured subsections or forward to first navigational child
Subsection List (multi-level)	STORE_CTLG_DLDN_SCT_BULLET	ibeCCtpDdLfStBl.jsp	Parent section short description with all subsections and their child section names.

Table E–1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Subsection List (multi-level) include	STORE_CTLG_DLDN_SCT_ BULLET_INCL	ibeCCtdDdLfStBl.jsp	Parent section short description with all subsections and their child section names.
Subsection List with product detail	STORE_CTLG_DRILL_LEAF	ibeCCtpDrillLeaf.jsp	Parent section name, short description and image, with subsections and their product detail.
Subsection List with product detail include	STORE_CTLG_DRILL_LEAF_ INCL	ibeCCtdDrillLeafI.jsp	Parent section name, short description and image, with subsections and their product detail.
Product detail	STORE_CTLG_FSUBSCT	ibeCCtpFSubSct.jsp	Parent section short description, long description and additional information, with products names, images and descriptions.
Product detail include	STORE_CTLG_FSUBSCT_INCL	ibeCCtdFSubSctI.jsp	Parent section short description, long description and additional information, with products names, images and descriptions.
Product multi-select	STORE_CTLG_FSUBSCT_MULT_ 2COL	ibeCCtpFSuStMs2.jsp	Parent section short description, long description and additional information with product multi-select.

Table E–1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Product multi-select include	STORE_CTLG_FSUBSCT_MULT_2COL_INCL	ibeCCtdFSuStMs2I.jsp	Parent section short description, long description and additional information with product multi-select.
Product multi-select with section link	STORE_CTLG_FSUBSCT_MULT_3COL	ibeCCtpFSuStMs3.jsp	Parent section short description, long description and additional information, with product multi-select and section link.
Product multi-select with section link include	STORE_CTLG_FSUBSCT_MULT_3COL_INCL	ibeCCtdFSuStMs3I.jsp	Parent section short description, long description and additional information, with product multi-select and section link.
Product basic information	STORE_CTLG_ITEM_DESC	ibeCCtdItemDesc.jsp	Product name and description.
Product basic information with image	STORE_CTLG_ITEM_DESC_AND_IMG	ibeCCtdItemDescImg.jsp	Product name, description and large image.
Product detail with image	STORE_CTLG_ITEM_DETAILS	ibeCCtdItemDetail.jsp	Product name, description, large image, additional information, flexfields and related products.
Product detail without image	STORE_CTLG_ITEM_DETAILS_NO_IMG	ibeCCtdItemDtlNoImg.jsp	Product name, description, additional information, flexfields and related products.
Product additional information	STORE_CTLG_ITEM_INFO	ibeCCtdItemInfo.jsp	Product additional information
Product name and description include	STORE_CTLG_LEAF_ITEM_INCL	ibeCCtdLeafItem.jsp	Product name and description within section page.

Table E-1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Product detail	STORE_CTLG_LEAF_SCT_SINGLE	ibeCCtpLeafSctSs.jsp	Section name, short description and image, with product names, small images and descriptions.
Product detail include	STORE_CTLG_LEAF_SCT_SINGLE_INCL	ibeCCtdLeafSctSsI.jsp	Section name, short description and image, with product names, small images and descriptions.
Product detail multi-select	STORE_CTLG_LEAF_SCT_ITEMS	ibeCCtpLfStIts.jsp	Section short description with product multi-select. Includes product names, small images and descriptions.
Product detail multi-select include	STORE_CTLG_LEAF_SCT_ITEMS_INCL	ibeCCtdLfStItsI.jsp	Section short description with product multi-select. Includes product names, small images and descriptions.
Product multi-select with drill-down	STORE_CTLG_LEAF_SCT_MULTIPLE	ibeCCtpLfStMsL.jsp	Section short description, long description and additional information with product multi-select and link to product detail.
Product multi-select with drill-down include	STORE_CTLG_LEAF_SCT_MULT_INCL	ibeCCtdLfStMsLI.jsp	Section short description, long description and additional information with product multi-select and link to product detail.

Table E–1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Subsection List	STORE_CTLG_SCT_BULLET_SUBSCT	ibeCCtpStBlSuSt.jsp	Parent section short and long description plus additional information with Subsection List.
Subsection List include	STORE_CTLG_SCT_BULLET_SUBSCT_INCL	ibeCCtdStBlSuStI.jsp	Parent section short and long description plus additional information with Subsection List.
Product pull-down	STORE_CTLG_SCT_DTL_DPDN_ITEMS	ibeCCtpStMmDtIts.jsp	Section name, image, long description and additional information with product pull-down list.
Product pull-down include	STORE_CTLG_SCT_DTL_DPDN_ITEMS_INCL	ibeCCtdStMmDtItsI.jsp	Section name, image, long description and additional information with product pull-down list.
Subsection List 2	STORE_CTLG_SCTN_BULLET_SUBSCT	ibeCCtpStNBISuSt.jsp	Parent section name, short description plus additional information with Subsection List
Subsection List 2, include	STORE_CTLG_SCTN_BULLET_SUBSCT_INCL	ibeCCtdStNBISuStI.jsp	Parent section name, short description plus additional information with Subsection List
Product multi-select	STORE_CTLG_LF_SCT_MULT_NOLINKS	ibeCCtpLfStMs.jsp	Section short description, long description and additional information with product multi-select.

Table E–1 Catalog Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Product multi-select include	STORE_CTLG_LF_SCT_MULT_NOLINKS_INCL	ibeCCtdLfStMsI.jsp	Section short description, long description and additional information with product multi-select.
Subsection List with product pull-down list	STORE_CTLG_SUBSCT_DPDN_ITEMS	ibeCCtpChStDdIts.jsp	All subsection names, short descriptions, images and product pull-down list.
Subsection List with product pull-down list include	STORE_CTLG_SUBSCT_DPDN_ITEMS_INCL	ibeCCtdChStDdItsI.jsp	All subsection names, short descriptions, images and product pull-down list.
Catalog Section Show Media	STORE_CTLG_SHOW_MEDIA	ibeCCtpShowMedia.jsp	Displays common section layout. In the center of the page, embeds logical media passed in as parameter.
Catalog Section Show Media Include	STORE_CTLG_SHOW_MEDIA_INCL	ibeCCtdShowMediaI.jsp	Displays common section layout. In the center of the page, embeds logical media passed in as parameter.

E.2 Product Search Display Templates

The following table, Product Search Display Templates, lists seeded Display Templates for Customer UI Product Search. This functionality is described in [Section 6.8, "Setting up Product Search for the Customer UI"](#).

Table E–2 Product Search Display Templates

Name	Prog. Access Name	Source File	Description
Advanced Search Form	STORE_SEARCH_REFINE	ibeCSrdSrchAdvForm.jsp	Advanced Search Form
Item Search Menu Display Page	STORE_SEARCH_MENU	ibeCSrdSrchMenu.jsp	Item Search Menu Display Page
SEARCH RESULT	STORE_SEARCH_RESULT	ibeCSrdSrchResults.jsp	Shows search results

E.3 Shopping Cart Display Templates

The following table, Shopping Cart Display Templates, lists seeded Display Templates for the Customer UI Shopping Cart. See [Chapter 11, "Implementing Carts and Orders"](#), for more information.

Table E–3 Shopping Cart Display Templates

Name	Prog. Access Name	Source File	Description
Shopping Carts Total Amounts	STORE_SHOP_CART_SUMMARY	To display shipping/handling and tax in the shopping cart, map to: ibrCScdShowCartSummary.jsp (this is the default mapping) To not display: map to ibrCScdShowShopCartSummary.jsp	This template is used to map cart total amount (tax, S&H, sub-total region) on shopping cart page.
Shopping Cart Add Item	STORE_CART_ADD_ITEM	ibeCScpAddItem.jsp	Add Item to Cart Page
Show Bundle Details	STORE_CART_BUNDLE_DETAILS	ibeCScdBundDet.jsp	Displays Bundle Details
Add Bundle or Education	STORE_CART_BUNDL_EDUC_P	ibeCScpBundEduc.jsp	Adds Bundle, adds Education, or adds Bundle w/ Education
Configuration Items Details Popup	STORE_CART_CFG_ITEMS	ibeCScdCfgItemsPopup.jsp	Configuration Items Details Popup
Shop Cart Create Attachments	STORE_CART_CREATE_ATTCH	ibeCScdCreateAttch.jsp	Shop cart create attachments
Shop Cart Direct Entry	STORE_CART_DIRECT_ENTRY	ibeCScdDirectEntry.jsp	Enter customers' inventory items to cart - direct entry

Table E-3 Shopping Cart Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Shop Cart Direct Entry Process	STORE_CART_DIRECT_ENTRY_P	ibeCScpDirectEntry.jsp	Processes direct entries
View Quote Discount Details Display Page	STORE_CART_DISCOUNTS	ibeCScdDiscounts.jsp	View Quote Discount Details Display Page
Enter Promotion Code	STORE_CART_ENTER_PROMO	ibeCScdEnterPromo.jsp	Enter Promotion Code page
Enter Promotion Code	STORE_CART_ENTER_PROMO_P	ibeCScpEnterPromo.jsp	Enter Promotion Code process page
SHOPPING CART GET SHAREE	STORE_CART_GET_SHAREE	ibeCScdSharee.jsp	Retrieve sharee shopping cart
Included warranties display page	STORE_CART_INCSVC_TBL	ibeCScdIncSvcTbl.jsp	Included warranties display page
Store Cart Items Bin Bottom	STORE_CART_ITEMS_BIN_BOTTOM	none	Bin at the bottom part of the Display Cart page
Store Cart Items Bin Top	STORE_CART_ITEMS_BIN_TOP	none	Bin at the top part of the Display Cart page
Modify line level shipping details display page	STORE_CART_LINE_SPLIT_DETAILS	ibeCCkdLineSplit.jsp	Modify line level shipping details display page
Modify line level shipping details process page	STORE_CART_LINE_SPLIT_DETAILS_P	ibeCCkpLineSplit.jsp	Modify line level shipping details process page
Shopping cart line tax	STORE_CART_LINE_TAX	none	Shopping cart line tax display
Shop Cart List Agreements	STORE_CART_LIST_AGRMNT	ibeCScdListAgrmnt.jsp	Shop cart list agreements
Shop Cart List Agreements Process Page	STORE_CART_LIST_AGRMNT_P	ibeCScpListAgrmnt.jsp	Shop cart list agreements process page

Table E–3 Shopping Cart Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
View current agreement	STORE_AGRMNT_VIEW	ibeCScdAgrmntDetail.jsp	View current agreement
Agreement detail view processing	STORE_AGRMNT_VIEW_P	ibeCScpAgrmntDetail.jsp	Processing page for agreement detail view
Attachments create form	STORE_ATTCH_CREATE_FORM	ibeCScdCreateAttchForm.jsp	Attachments create form
Attachments list table	STORE_ATTCH_LIST	ibeCScdListAttchTable.jsp	Attachments list table
Create attachment process	STORE_ATTCH_CREATE_P	ibeCScpCreateAttch.jsp	Create attachment process
List attachments process	STORE_ATTCH_P	ibeCScpListAttch.jsp	list attachments process
Shop Cart List Attachments	STORE_CART_LIST_ATTCH	ibeCScdListAttch.jsp	Shop cart list attachments
Store Cart List Include	STORE_CART_LIST_INCLUDE	ibeCScdListInclude.jsp	This is a dynamic include page which will be used for both Quotes listing and list of Saved Carts page
Store Cart List Quotes	STORE_CART_LIST_QUOTES	ibeCScdListQ.jsp	This is a container page to display Quotes listing
Store Cart List Quotes P	STORE_CART_LIST_QUOTES_P	ibeCScpListQ.jsp	Processing page for Quote Listing.
Shopping Cart Sub Menu	STORE_CART_MENU	ibeCScdMenu.jsp	Shopping cart sub menu
Shopping Cart Modify	STORE_CART_MODIFY	ibeCScdViewA.jsp	Modify shopping cart
Shopping Cart Modify Process	STORE_CART_MODIFY_P	ibeCScpViewA.jsp	Modify shopping cart process page
Table of Promotion Code Display Page	STORE_CART_PROMO_TBL	ibeCScdPromoTbl.jsp	Table of Promotion Code Display Page
Shopping Cart Save	STORE_CART_SAVE	ibeCScdSave.jsp	Save shopping cart

Table E-3 Shopping Cart Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Save Cart Process	STORE_CART_SAVE_CONFIRM	ibeCScdConfirm.jsp	Save Cart Process
Save and Confirm	STORE_CART_SAVE_CONFIRM_P	ibeCScpConfirm.jsp	Save and Confirm
Shopping Cart Save Process	STORE_CART_SAVE_P	ibeCScpSave.jsp	Save shopping cart process page
Support Levels	STORE_CART_SEL_SUPP	ibeCScdSupportLvl.jsp	Support Levels
Service details display page	STORE_CART_SERVICE_DETAILS	ibeCScdSvcDetails.jsp	Service details display page
Shopping Cart View	STORE_CART_VIEW	ibeCScdViewS.jsp	View shopping cart
View Shopping Cart Line	STORE_CART_VIEW_LINE	ibeCScdShowCartLines.jsp	View Shopping Cart Line
Shopping Cart Lists View	STORE_CART_VIEW_LIST	ibeCScdListS.jsp	View shopping cart lists
Shopping Cart Lists View Process	STORE_CART_VIEW_LIST_P	ibeCScpListS.jsp	View shopping cart lists process page
Shopping Cart View Process	STORE_CART_VIEW_P	ibeCScpViewS.jsp	View shopping cart process page
Store Cart view Quote	STORE_CART_VIEW_QUOTE	ibeCScdViewQ.jsp	This is a display page which will be used to display Quote Details
Store Cart view Quote Process	STORE_CART_VIEW_QUOTE_P	ibeCScpViewQ.jsp	This is a processing page which will be used to display Quote Details.
View Shopping Cart Sum	STORE_CART_VIEW_SUM	ibeCScdShowCartSummary.jsp	View Shopping Cart Sum
Shopping Cart Warning Display	STORE_CART_WARN	ibeCScdWarn.jsp	Shopping Cart Warning Display
Shopping Cart Warning Process	STORE_CART_WARN_P	ibeCScpWarn.jsp	Shopping Cart Warning Process

Table E–3 Shopping Cart Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Left bin on Shopping Cart page	STORE_CART_BIN_LEFT1	none	Left1 bin on Shopping Cart page
Left2 bin on Shopping Cart page	STORE_CART_BIN_LEFT2	none	Left2 bin on Shopping Cart page
Left3 bin on Shopping Cart page	STORE_CART_BIN_LEFT3	none	Left3 bin on Shopping Cart page
Left4 bin on Shopping Cart page	STORE_CART_BIN_LEFT4	none	Left4 bin on Shopping Cart page
Left5 bin on Shopping Cart page	STORE_CART_BIN_LEFT5	none	Left5 bin on Shopping Cart page
Left6 bin on Shopping Cart page	STORE_CART_BIN_LEFT6	none	Left6 bin on Shopping Cart page
Left7 bin on Shopping Cart page	STORE_CART_BIN_LEFT7	none	Left7 bin on Shopping Cart page
Right1 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT1	none	Right1 bin on Shopping Cart page.
Right2 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT2	none	Right2 bin on Shopping Cart page.
Right3 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT3	none	Right3 bin on Shopping Cart page.
Right4 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT4	none	Right4 bin on Shopping Cart page.
Right5 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT5	none	Right5 bin on Shopping Cart page.

Table E-3 Shopping Cart Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Right6 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT6	none	Right6 bin on Shopping Cart page.
Right7 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT7	none	Right7 bin on Shopping Cart page.
Master Control page for b2b and b2c share cart	STORE_CART_SHARE	ibeCScdShare.jsp	This is the master control page for both b2b and b2c share cart.
B2B Share cart display	STORE_CART_SHARE_B2B	ibeCScdBShare.jsp	B2B Share cart display page
B2B Share cart processing	STORE_CART_SHARE_B2B_P	ibeCScpBShare.jsp	B2B Share cart processing page
B2C Share cart display	STORE_CART_SHARE_B2C	ibeCScdCShare.jsp	B2C Share cart display page
B2C Share cart processing	STORE_CART_SHARE_B2C_P	ibeCScpCShare.jsp	B2C Share cart processing page
B2B Share Cart - Add recipients display	STORE_CART_ADD_RCPT	ibeCScdAddRecipients.jsp	B2B Share Cart - Add recipients display page
B2B Share Cart - Add recipients processing	STORE_CART_ADD_RCPT_P	ibeCScpAddRecipients.jsp	B2B Share Cart - Add recipients processing page
Share Cart - Modify recipients	STORE_CART_MODIFY_RCPTS	ibeCScdModifyRecipients.jsp	Share Cart - Modify recipients display page
Share Cart - Modify recipients Processing	STORE_CART_MODIFY_RCPTS_P	ibeCScpModifyRecipients.jsp	Share Cart - Modify recipients Processing page
Share Cart - List recipients	STORE_CART_LIST_RCPTS	ibeCScdListRecipients.jsp	Share Cart - List recipients include page
Shared Cart Details	STORE_CART_VIEW_SHARED_CART	ibeCScdViewSharedCart.jsp	Shared Cart details for owner and recipients

Table E–3 Shopping Cart Display Templates (Cont.)

Name	Prog. Access Name	Source File	Description
Shared Quote Details	STORE_CART_VIEW_SHARED_QUOTE	ibeCScdViewSharedQuote.jsp	Shared quote details for owner and recipient
Shared cart/quotes processing page	STORE_CART_VIEW_SHARED_CART_QUOTE_P	ibeCScpViewSharedCartQuote.jsp	Shared cart/quotes processing page
Delete cart warning page	STORE_CART_WARN_DELETE	ibeCScdWarnDelete.jsp	Delete cart warning page
List of all carts/Quotes Shared by cart owner	STORE_CART_SHAREBYINCLUDE	ibeCScdListSharedByUser.jsp	List of all carts/Quotes shared by cart owner
List of all carts/quotes shared to recipient	STORE_CART_SHARETOINCLUDE	ibeCScdListSharedToUser.jsp	List of all carts/quotes shared to recipient
Controller page for My Carts/My Quotes pages	STORE_CART_CONTROL	ibeCScdListControl.jsp	Controller page for My Carts/My Quotes pages
Shared cart retrieval by retrieval number page	STORE_CART_SH_RETRIEVE	ibeCScdShRetrieve.jsp	Shared cart retrieval by retrieval number page

E.4 Shopping List Display Templates

The following table, Shopping List Display Templates, lists seeded Display Templates for Shopping Lists. See [Chapter 11, "Implementing Carts and Orders"](#), for more information.

Table E–4 Shopping List Display Templates

Name	Access Name	Source File	Description
SHOP LIST DISPLAY	STORE_SLIST_DISPLAY	ibeCSldListDetail.jsp	Display shopping list
SHOP LISTS DISPLAY	STORE_SLIST_DISPLAY_LIST	ibeCSldLists.jsp	Displays shopping lists
SHOP LIST PROCESS	STORE_SLIST_DISPLAY_P	ibeCSlpListDetail.jsp	Processes shopping list
SHOP LIST SAVE	STORE_SLIST_SAVE	ibeCSldSave.jsp	Save a shopping list
SHOP LIST SAVE PROCESS	STORE_SLIST_SAVE_P	ibeCSlpSave.jsp	Process saving of shopping list
Shopping list warning page	STORE_SLIST_WARN	ibeCSldListWarn.jsp	Warning page for shopping list
Shopping list warning processing page	STORE_SLIST_WARN_P	ibeCSlpListWarn.jsp	Warning processing page for shopping list

E.5 Checkout Display Templates

The following table, Checkout Display Templates, lists seeded Display Templates for checkout functionality in the Customer UI. See [Chapter 11, "Implementing Carts and Orders"](#), for more information.

Table E–5 Checkout Display Templates

Name	Access Name	Source File	Description
B2B Bill Payment Display Page	STORE_CHKOUT_B2B_INVOICE_HEADER	ibeCCkdBHdrBillPay.jsp	B2B Bill Payment Display Page
B2B Bill Payment Process Page	STORE_CHKOUT_B2B_INVOICE_HEADER_P	ibeCCkpBHdrBillPay.jsp	B2B Bill Payment Process Page
B2B Header Shipment Display Page	STORE_CHKOUT_B2B_SHIP_HEADER	ibeCCkdBHdrShip.jsp	B2B Header Shipment Display Page
B2B Shipment Process Page	STORE_CHKOUT_B2B_SHIP_HEADER_P	ibeCCkpBHdrShip.jsp	B2B Shipment Process Page
B2C Bill Payment Display Page	STORE_CHKOUT_B2C_INVOICE_HEADER	ibeCCkdCHdrBillPay.jsp	B2C Bill Payment Display Page

Table E–5 Checkout Display Templates (Cont.)

Name	Access Name	Source File	Description
B2C Header Shipment Display Page	STORE_CHKOUT_B2C_SHIP_HEADER	ibeCCkdCHdrShip.jsp	B2C Header Shipment Display Page
Store_Chkout_B2B_Invoice_Line_P	STORE_CHKOUT_B2B_INVOICE_LINE_P	ibeCCkpBLineBillPay.jsp	Processing Page for Line Billing
Save Commitments	STORE_CHKOUT_COMMITMENT_SAVE	ibeCCkpSaveCommitments.jsp	Saves commitment information into the cart
Select Commitment	STORE_CHKOUT_COMMITMENT_SELECT	ibeCCkdSelectCommitment.jsp	Shows available commitments and lets user select one
Show Commitments	STORE_CHKOUT_COMMITMENT_SHOW	ibeCCkdShowCommitments.jsp	Displays and Assigns Commitments for Cart Lines
Contract Checkout	STORE_CHKOUT_CONTRACT	ibeCCkdCntrct.jsp	Contract Checkout
Contract Change Display	STORE_CHKOUT_CONTRACT_CHANGE	ibeCCkdCntrctChng.jsp	Contract Change
Contract Change Processing	STORE_CHKOUT_CONTRACT_CHANGE_P	ibeCCkpCntrctChng.jsp	Contract Change
Change Contract	STORE_CHKOUT_CONTRACT_CHANGE_SENT	ibeCCkdCntrctSent.jsp	Contract Change
Contract Process	STORE_CHKOUT_CONTRACT_P	ibeCCkpCntrct.jsp	Contract Process
Standard Contract	STORE_CHKOUT_CONTRACT_STD	none	Standard Contract
Contract Text	STORE_CHKOUT_CONTRACT_TEXT	ibeCCkdCntrctText.jsp	Contract Text
Header Display	STORE_CHKOUT_HEADER_DISPLAY	ibeCCkdHdrDisplay.jsp	Header Display
Invoice Header Display	STORE_CHKOUT_INVOICE_HEADER	ibeCCkdHdrBillPay.jsp	Invoice Header Display
Invoice Header Process	STORE_CHKOUT_INVOICE_HEADER_P	ibeCCkpHdrBillPay.jsp	Invoice Header Process
Line Shipments Details Page	STORE_CHKOUT_LINE_SHIP_DTLS	ibeCCkdLineShipDetails.jsp	Line Shipments Details Page
Line Shipments Summary Page	STORE_CHKOUT_LINE_SHIP_SUMM	ibeCCkdLineShipSummary.jsp	Line Shipments Summary Page

Table E-5 Checkout Display Templates (Cont.)

Name	Access Name	Source File	Description
STORE_CHKOUT_ LINE_BILL_DTLS	STORE_CHKOUT_LINE_ BILL_DTLS	ibeCCkdLineBillDetails.jsp	Details Page for Line Billing
STORE_CHKOUT_ LINE_BILL_SUMM	STORE_CHKOUT_LINE_ BILL_SUMM	ibeCCkdLineBillSummary.jsp	Summary Page for Line Billing
STORE_CHKOUT_ LINE_SUMM	STORE_CHKOUT_LINE_ SUMM	ibeCCkdLineSummary.jsp	Common include Page for displaying the lines for Shipping and Billing
STORE_CHKOUT_ PAYMENT_CHANGE	STORE_CHKOUT_ PAYMENT_CHANGE	ibeCCkdPmtChng.jsp	New page which will be used to Update Payment Information alone
STORE_CHKOUT_ PAYMENT_ CHANGE_P	STORE_CHKOUT_ PAYMENT_CHANGE_P	ibeCCkpPmtChng.jsp	New processing page which will be used to Update Payment Information alone
Select customer for quote	STORE_CHKOUT_ QUOTE_CUSTOMER	ibeCCkdQuoteCust.jsp	Select customer for quote
Order Review	STORE_CHKOUT_ REVIEW	ibeCCkdOrdReview.jsp	Order Review
Order Review Process	STORE_CHKOUT_ REVIEW_P	ibeCCkpOrdReview.jsp	Order Review Process
Sales Help	STORE_CHKOUT_SALES_ HELP	ibeCCkdSalesHelp.jsp	Sales Help
Sale Help Process	STORE_CHKOUT_SALES_ HELP_P	ibeCCkpSalesHelp.jsp	Sale Help Process
Address search page	STORE_CHKOUT_ SEARCH_ADDRESS	ibeCCkdSearchAddr.jsp	Address search page
Contact search page	STORE_CHKOUT_ SEARCH_CONTACT	ibeCCkdSearchCntct.jsp	Contact search page
Customer search page	STORE_CHKOUT_ SEARCH_CUSTOMER	ibeCCkdSearchCust.jsp	Customer search page
Ship Header Display	STORE_CHKOUT_SHIP_ HEADER	ibeCCkdHdrShip.jsp	Ship Header Display
Ship Header Process	STORE_CHKOUT_SHIP_ HEADER_P	ibeCCkpHdrShip.jsp	Ship Header Process
Shipment Methods	STORE_CHKOUT_ SHIPMENT_METHODS	ibeCCkdShipMthds.jsp	Shipment Methods

Table E–5 Checkout Display Templates (Cont.)

Name	Access Name	Source File	Description
Order Summary	STORE_CHKOUT_SUMMARY	ibeCCkdOrdSummary.jsp	Order Summary
Store Chkout Update Address	STORE_CHKOUT_UPDATE_ADDRESS	ibeCCkdUpdateAddr.jsp	Update Address
Store Chkout Update Address Process	STORE_CHKOUT_UPDATE_ADDRESS_P	ibeCCkpUpdateAddr.jsp	Update Address Process
Address search results	STORE_CHKOUT_VIEW_ADDRESSES	ibeCCkdViewAddr.jsp	Address search results
Contact search results page	STORE_CHKOUT_VIEW_CONTACTS	ibeCCkdViewCntct.jsp	Contact search results page
Customer search results page	STORE_CHKOUT_VIEW_CUSTOMERS	ibeCCkdViewCust.jsp	Customer search results page
Process address search	STORE_CHKOUT_VIEW_ADDRESSES_P	ibeCCkpViewAddr.jsp	Process address search
Process contact search	STORE_CHKOUT_VIEW_CONTACTS_P	ibeCCkpViewCntct.jsp	Process contact search
Process customer search	STORE_CHKOUT_VIEW_CUSTOMERS_P	ibeCCkpViewCust.jsp	Process customer search
Create new customer	STORE_CHKOUT_CREATE_CUSTOMER	ibeCCkdCreateCust.jsp	Create new customer
Process customer creation	STORE_CHKOUT_CREATE_CUSTOMER_P	ibeCCkpCreateCust.jsp	Process customer creation
Create new address	STORE_CHKOUT_CREATE_ADDRESS	ibeCCkdCreateAddr.jsp	Create new address
Process address creation	STORE_CHKOUT_CREATE_ADDRESS_P	ibeCCkpCreateAddr.jsp	Process address creation
Create new contact	STORE_CHKOUT_CREATE_CONTACT	ibeCCkdCreateCntct.jsp	Create new contact
Process contact creation	STORE_CHKOUT_CREATE_CONTACT_P	ibeCCkpCreateCntct.jsp	Process contact creation

E.6 Express Checkout Display Templates

The following table, Express Checkout Display Templates, lists seeded Display Templates for Express Checkout. See [Chapter 11, "Implementing Carts and Orders"](#), for more information.

Table E–6 Express Checkout Display Templates

Name	Access Name	Source File	Description
EXPRESS CHK OUT CANCEL	STORE_XPR_CANCEL	ibeCXpdShowCancel.jsp	Cancel a express chk out order
EXPRESS CHK OUT ERROR	STORE_XPR_ERROR	ibeCXpdShowError.jsp	Error during express chk out
EXPRESS CHK OUT PROCESS	STORE_XPR_PROCESS	ibeCXppDoButton.jsp	Processes the express chk out request
EXPRESS CHK OUT SETTINGS DISPLAY	STORE_XPR_SETTINGS_DISPLAY	ibeCXpdShowSettings.jsp	Displays express chk out settings
EXPRESS CHK OUT SETTINGS SAVE	STORE_XPR_SETTINGS_SAVE	ibeCXppSaveSettings.jsp	Save express chk out settings
EXPRESS CHK OUT TAG AREA	STORE_XPR_TAG_AREA	ibeCXpdShowTag.jsp	Displays the area around the chk out tag
EXPRESS CHK OUT VIEW	STORE_XPR_VIEW	ibeCXpdViewPending.jsp	View a express chk out order

E.7 Postsales Display Templates

The following table, Postsales Display Templates, lists seeded Display Templates for postsales activity. See [Chapter 11, "Implementing Carts and Orders"](#), for more information.

Table E–7 Postsales Display Templates

Name	Access Name	Source File	Description
Invoice detail	STORE_PSI_INVOICE_DETAIL	ibeiinvd.jsp	Invoice details
Invoice detail	STORE_PSI_INVOICE_DETAIL_D	ibeCOtdInvDtl.jsp	Invoice details
Invoice Details Processing Page	STORE_PSI_INVOICE_DETAIL_P	ibeCOtdInvDtlMain.jsp	Invoice details processing page

Table E-7 Postsales Display Templates (Cont.)

Name	Access Name	Source File	Description
Invoice payment details	STORE_PSI_INVOICE_PAYMENT_DETAIL	ibeiivpd.jsp	Invoice payment details
Invoice payment details	STORE_PSI_INVOICE_PAYMENT_DETAIL_D	ibeCOtdInvPmtDtl.jsp	Invoice payment details
Invoice to Payment Details Processing Page	STORE_PSI_INVOICE_PAYMENT_DETAIL_P	ibeCOtdInvPmtMain.jsp	Invoice to payment details processing page
Invoice summary	STORE_PSI_INVOICE_SUMMARY	ibeiinvh.jsp	Invoice summary
Invoice Summary Display Page	STORE_PSI_INVOICE_SUMMARY_D	ibeCOtdInvSum.jsp	Invoice summary display page
Invoice Summary Processing Page	STORE_PSI_INVOICE_SUMMARY_P	ibeCOtdInvSumMain.jsp	Invoice summary processing page
Order Detail Display Page	STORE_PSI_ORDER_DETAIL_D	ibeCOtdOrdDtl.jsp	Order detail display page
Order Detail Processing Page	STORE_PSI_ORDER_DETAIL_P	ibeCOtdOrdDtlMain.jsp	Order detail processing page
Order Summary Display Page	STORE_PSI_ORDER_SUMMARY_D	ibeCOtdOrdSum.jsp	Order summary display page
Order Summary Processing Page	STORE_PSI_ORDER_SUMMARY_P	ibeCOtdOrdSumMain.jsp	Order summary processing page
Payment Detail	STORE_PSI_PAYMENT_DETAIL	ibeipmtd.jsp	Payment details
Payment Detail	STORE_PSI_PAYMENT_DETAIL_D	ibeCOtdPmtDtl.jsp	Payment details display page
Payment Details Processing Page	STORE_PSI_PAYMENT_DETAIL_P	ibeCOtdPmtDtlMain.jsp	Payment details processing page
Payment Summary	STORE_PSI_PAYMENT_SUMMARY_D	ibeCOtdPmtSum.jsp	Payment summary display page
Payment Summary Processing	STORE_PSI_PAYMENT_SUMMARY_P	ibeCOtdPmtSumMain.jsp	Payment summary processing page
Order Details	STORE_PSI_ORDER_DETAIL	ibeiodtl.jsp	Order details page
Order Search Results	STORE_PSI_ORDER_SUMMARY	ibeiohdr.jsp	Order search results page

Table E-7 Postsales Display Templates (Cont.)

Name	Access Name	Source File	Description
Postsales Address Display	STORE_PSI_ADDRESS_DISPLAY	ibeiaaddr.jsp	Address display page
Store Cancel Order	STORE_PSI_CANCEL_ORDER_P	ibeCOtdOrdCancelMain.jsp	Template for cancel order screen
Shipment Details	STORE_PSI_SHIPMENT_DETAIL	ibeiship.jsp	Shipment details page
Shipment Details Display	STORE_PSI_SHIPMENT_DETAIL_D	ibeCOtdShpDtl.jsp	Shipment details display page
Shipment Details Processing	STORE_PSI_SHIPMENT_DETAIL_P	ibeCOtdShpDtlMain.jsp	Shipment details processing page
Shipping Details Custom Processing	STORE_SHIP_DETAIL_CUSTOM_P	ibeCOtpShpDtlCustom.jsp	Shipping details custom processing page

E.8 Available to Promise Display Templates

The following table, Available to Promise Display Templates, lists seeded Display Templates for Available to Promise (ATP) functionality in the Customer UI. See [Section 6.4, "Providing Regular Available to Promise \(ATP\)"](#), for more information.

Table E-8 Available to Promise Display Templates

Name	Access Name	Source File	Description
ATP Component page for Customer	STORE_PSI_ATP_C	ibeCOtcAtp.jsp	ATP Component page for Customer and Sales Rep
ATP Display Page	STORE_PSI_ATP_D	ibeCOtdAtp.jsp	ATP Display Page
ATP HEADER	STORE_PSI_ATP_HEADER	ibeiatph.jsp	Display ATP headers
ATP Processing Page	STORE_PSI_ATP_P	ibeCOtpAtp.jsp	ATP Processing Page
ATP REDIRECT	STORE_PSI_ATP_REDIRECT	ibeiatpr.jsp	ATP Redirect page
ATP RESULTS	STORE_PSI_ITEM_AVAILABILITY	ibeicatp.jsp	Item availability report

E.9 Oracle Configurator Integration Display Templates

The following table, Oracle Configurator Integration Display Templates, lists seeded Display Templates for the Oracle Configurator integration in the Customer UI. See [Chapter 22, "Integrating Oracle iStore with Oracle Configurator"](#), for information about this functionality.

Table E–9 Oracle Configurator Integration Display Templates

Name	Access Name	Source File	Description
Branch or route upon return from Configurator	STORE_CFG_BRANCH	ibeCFgpBranch.jsp	Main logic page to route the return to iStore from Configurator
Display Configured item	STORE_CFG_DISPLAY	ibeCFgdDisplay.jsp	Display a Configured item in an HTML table cell
Set outer frame set to run Configurator	STORE_CFG_FRAME_SRC	ibeCFgdFrameSources.jsp	Establishes the outer frame set for Configurator DHTML UI to run in.
Starts the launching of the Configurator from iStore	STORE_CFG_LAUNCH	ibeCFgpLaunch.jsp	Prepares parameters to launch the Configurator from iStore.
Return page for Configurator to post to	STORE_CFG_REDIRECT	ibeCFgpRedirect.jsp	Initial page for Configurator servlet to post to in returning to iStore and regaining iStore context.

E.10 User Management Display Templates

The following table, User Management Display Templates, lists seeded Display Templates for User Management. See [Chapter 12, "Implementing Users and Registration"](#), for more information.

Table E–10 User Management Display Templates

Name	Access Name	Source File	Description
Personal Information	STORE_CUST_ACC_HOME	ibeCAcdPersonalInfo.jsp	Personal Information
Login	STORE_CUST_ACC_LOGIN	ibeCAcdLogin.jsp	Login
Account Authorization	STORE_CUST_ACC_LOGIN_AUTH	ibeCAcpLogin.jsp	Account Authorization

Table E-10 User Management Display Templates (Cont.)

Name	Access Name	Source File	Description
Logout	STORE_CUST_ACC_LOGOUT	ibeCAcpLogout.jsp	Logout
Password Change	STORE_CUST_ACC_PASSWORD	ibeCAcdPassword.jsp	Password Change
Order preferences	STORE_CUST_ACC_PREFS	ibeCAcdPreferences.jsp	Order preferences
Password Assistance	STORE_CUST_ACC_PWD_RESET	ibeCAcdPwdAssist.jsp	Password assistance
Password Assistance Processing	STORE_CUST_ACC_PWD_RESET_P	ibeCAcpPwdAssist.jsp	Password assistance processing
Account Select Display	STORE_CUST_ACC_SELECT	ibeCAcdChooseAcct.jsp	Account Select Display
Account Select Processing	STORE_CUST_ACC_SELECTED	ibeCAcpChooseAcct.jsp	Account Select Processing
My account menu	STORE_CUST_ACC_SUBMENU	ibeCAcdMenu.jsp	Profile menu
Welcome	STORE_CUST_ACC_WELCOME	ibeCAcdWelcome.jsp	Welcome
Business User registration display	STORE_CUST_BUSINESS_REGISTRATION	ibeCAcdBizUserReg.jsp	Business User registration display
Payment Book processing	STORE_CUST_PMTBK_DISPLAY	ibeCPmdPmtBook.jsp	Payment Book processing
Payment Options Display	STORE_CUST_PMTBK_PAYMENT_OPTIONS	ibeCPmdPmtOptions.jsp	Payment Options Display
Payment Book processing	STORE_CUST_PMTBK_SAVE	ibeCPmpPmtBook.jsp	Payment Book processing
User profile	STORE_CUST_PROFILE	ibeCAcpProfile.jsp	User profile
Registration processing	STORE_CUST_REGISTRATION	ibeCAcpRegistration.jsp	Registration processing
End User registration display	STORE_CUST_SIGNIN	ibeCAcdEndUserReg.jsp	End User registration display
User Account Management	STORE_USR_MGMT_ACC_W	ibeCUmpAcctWrap.jsp	User Account Management

Table E-10 User Management Display Templates (Cont.)

Name	Access Name	Source File	Description
Add User Account	STORE_USR_MGMT_ADD_ACC_W	ibeCUmpAddAcctWrap.jsp	Add User Account
Permission Management	STORE_USR_MGMT_PERM_W	ibeCUmpPermWrap.jsp	Permission Management
Role Management	STORE_USR_MGMT_ROLE_W	ibeCUmpRoleWrap.jsp	Role Management
User Management	STORE_USR_MGMT_USER_W	ibeCUmpUserWrap.jsp	User Management

E.11 Reports and Bins Display Templates

The following table, Reports and Bins Display Templates, lists seeded Display Templates for Oracle iStore Reports and Bins. See [Chapter 15, "Implementing Reports"](#), for more information.

Table E-11 Reports and Bins Display Templates

Name	Access Name	Source File	Description
Top Customer Bin Drilldown	BIN_TOP_CUSTOMER_DRILLDOWN	ibemrbosm.jsp	Drilldown for Top Customer Bin
Top Order Bin Drilldown	BIN_TOP_ORDER_DRILLDOWN	ibemrbosm.jsp	Drilldown for Top Order Bin
Top Product Bin Drilldown	BIN_TOP_PRODUCT_DRILLDOWN	ibemrbosm.jsp	Drilldown for Top Product Bin

E.12 Other Display Templates

The following table, Other Display Templates, lists other miscellaneous seeded Customer UI Display Templates.

Table E–12 Other Display Templates

Name	Access Name	Source File	Description
About Us	STORE_SP_ABOUT_US	none	About Us
Contact Us	STORE_SP_CONTACT_US	none	Contact Us
Frequently Asked Question	STORE_SP_FAQ	none	Frequently Asked Questions
Store Help	STORE_HELP	ibeahelp.jsp	Store Help
Store Help Page	STORE_HELP_PAGE	none	Help page
Partner	STORE_SP_PARTNER	none	Partner
Return Warranty	STORE_SP_RETURN_WARRANTY	none	Return Warranty
Store Welcome	STORE_SP_WELCOME	none	Store Welcome
JTF Style Sheet	JTF_STYLE_SHEET	jtfucss.css	Oracle CRM Technology Foundation Style Sheet
Store Style Sheet	STORE_STYLE_SHEET	jtfucss.css	Oracle iStore Cascading Style Sheet

E.13 Media Objects

The following table, Media Objects, lists seeded media objects. Source files are stored in the OA_MEDIA directory.

For a list of the language image media objects, see [Section 5.3.3, "Language Images"](#).

For a list of messages which also are seeded as media objects, see [Section 8.5.1, "Using Media Objects to Present Message Text"](#).

Table E–13 Media Objects

Name	Programmatic Access Name	Source File	Usage Suggestion
Store section small image	STORE_CTLG_SECTION_SMALL_IMAGE	none	Use to display section small images
Store item small image	STORE_CTLG_PRODUCT_SMALL_IMAGE	none	Use to display product small images
Store item large image	STORE_CTLG_PRODUCT_LARGE_IMAGE	none	Use to display product large images

Table E–13 Media Objects (Cont.)

Name	Programmatic Access Name	Source File	Usage Suggestion
Calalogue Item Dropdown Image	STORE_CTLG_ITEM_DROP_DOWN_IMAGE	none	Use to display product drop-down images
Catalogue Section Link image	STORE_CTLG_SCT_LINK_IMAGE	none	Use to display product images in multiple select templates
Tab Deselected Close Image	STORE_TAB_DESEL_CLOSE	ibeEOSltr5_default.gif	Use to display right corner of deselected tab in menu bar
My Account	STORE_TAB_LINK_ACCT	ibeTabLinkAcct.gif	Profile button at top right of screen
Shopping Cart	STORE_TAB_LINK_CART	ibeTabLinkCart.gif	Cart button at top right of screen
Help	STORE_TAB_LINK_HELP	ibeTabLinkHelp.gif	Help button at top right of screen
Order Tracker	STORE_TAB_LINK_ORDER	ibeTabLinkOrder.gif	Order button at top right of screen
Store Logo	STORE_TAB_LOGO	none	
Store Logo	STORE_LOGO	none	
Store Main Logo	STORE_LOGO_MAIN	ibeTabLogo.gif	
Specialty Store Logo Image	STORE_LOGO_SPECIALTY	none	
Tab Selected Close Image	STORE_TAB_SEL_CLOSE	ibeEOSltr6_default.gif	Use to display right corner of selected tab in menu bar
Bin Open Image	STORE_BIN_OPEN_IMAGE	ibeEOSutl02_default.gif	Use to display left corner of bin
Bin Close Image	STORE_BIN_CLOSE_IMAGE	ibeEOSutr02_default.gif	Use to display right corner of bin
Selected Cart Image	STORE_SEL_CART_IMAGE	ibeTabLinkCartS.gif	Use to display the selected cart icon
Deselected Cart Image	STORE_DESEL_CART_IMAGE	ibeTabLinkCart.gif	Use to display the deselected cart icon
Selected Account Image	STORE_SEL_ACCOUNT_IMAGE	ibeEOSuspr1_default.gif	Use to display the selected account icon

Table E-13 Media Objects (Cont.)

Name	Programmatic Access Name	Source File	Usage Suggestion
Deselected Account Image	STORE_DESEL_ACCOUNT_IMAGE	ibeEOSuspr0_default.gif	Use to display the deselected account icon
Selected Order Image	STORE_SEL_ORDER_IMAGE	ibeTabLinkOrderS.gif	Use to display the selected order icon
Deselected Order Image	STORE_DESEL_ORDER_IMAGE	ibeTabLinkOrder.gif	Use to display the deselected order icon
Selected Help Image	STORE_SEL_HELP_IMAGE	ibeTabLinkHelpS.gif	Use to display the selected help icon
Deselected Help Image	STORE_DESEL_HELP_IMAGE	ibeTabLinkHelp.gif	Use to display the deselected help icon
Transparent Image	STORE_TRANSPARENT_IMAGE	ibeEOSutrp_x_default.gif	
Subtab Top Image	STORE_SUBTAB_TOP	ibeEOSunvbf_default.gif	Use to display the top image of subtab bar
Subtab Separator Image	STORE_SUBTAB_SEPARATOR	ibeEOSussep_default.gif	Use to display the image of subtab separator
Tab Deselected Open Image	STORE_TAB_DESEL_OPEN	ibeEOStltr0_default.gif	Use to display left corner of deselected tab in menu bar
Tab Selected Open Image	STORE_TAB_SEL_OPEN	ibeEOStltr1_default.gif	Use to display left corner of selected tab in menu bar
Tab Deselected Close Selected Open Image	STORE_TAB_DESEL_CLOSE_DESEL_OPEN	ibeEOStltr2_default.gif	Use to display the image between two deselected tabs in menu bar
Tab Deselected Close Selected Open Image	STORE_TAB_DESEL_CLOSE_SEL_OPEN	ibeEOStltr3_default.gif	Use to display the image between a deselected tab and a selected tab in menu bar
Tab Selected Close Deselected Open Image	STORE_TAB_SEL_CLOSE_DESEL_OPEN	ibeEOStltr4_default.gif	Use to display the image between a selected tab and a deselected tab in menu bar
Tab Bottom Image	STORE_TAB_BOTTOM	ibeEOSsltr1_default.gif	Use to display the bottom of tab in menu bar
Subtab Curve Top Image	STORE_SUBTAB_CURVE_TOP	ibeEOSsltr2_default.gif	Use to display the image of curve top in subtab bar

Table E–13 Media Objects (Cont.)

Name	Programmatic Access Name	Source File	Usage Suggestion
Subtab Curve Bottom Image	STORE_SUBTAB_CURVE_BOTTOM	ibeEOSsltr3_default.gif	Use to display the image of curve bottom in subtab bar
Menu Right Edge Top Image	STORE_MENU_RIGHT_EDGE_TOP	ibeEOSsltr4_default.gif	Use to display the image of right edge of menu bar
Subtab Bottom Image	STORE_SUBTAB_BOTTOM	ibeEOSsltr5_default.gif	Use to display the bottom of subtab in subtab bar
Menu Left Edge Image	STORE_MENU_LEFT_EDGE	ibeEOSsltr6_default.gif	Use to display the left edge of menu bar
Menu Right Edge Bottom Image	STORE_MENU_RIGHT_EDGE_BOTTOM	ibeEOSsltr7_default.gif	Use to display the bottom of right edge of menu bar
Sign In Image	STORE_SIGN_IN_IMAGE	ibeEOSusin_default.gif	Use to display the sign in icon
Sign Out Image	STORE_SIGN_OUT_IMAGE	ibeEOSusout_default.gif	Use to display the sign off icon
Store Bar Top Image	STORE_BAR_TOP	ibeEOSwltr1_default.gif	Use to display the bar top image
Store Bar Bottom Image	STORE_BAR_BOTTOM	ibeEOSwltr5_default.gif	Use to display the bar bottom image
Store Bar Top Curve Image	STORE_BAR_CURVE_TOP	ibeEOSwltr2_default.gif	Use to display the top of bar curve image
Store Bar Bottom Curve Image	STORE_BAR_CURVE_BOTTOM	ibeEOSwltr3_default.gif	Use to display the bottom of bar curve image
Store Bar Tail Curve Image	STORE_BAR_CURVE_TAIL	ibeEOSbtail_default.gif	Use to display the tail of bar curve image
Selected Stores image	STORE_SEL_STORE_IMAGE	ibeTabLinkStoresS.gif	Use to display the selected store icon
Deselected Stores image	STORE_DESEL_STORE_IMAGE	ibeTabLinkStores.gif	Use to display the deselected store icon
Store copyright text	STORE_BOTTOM_CUST_COPYRIGHT	none	Use to display copyright statement at the bottom of Customer UI
Store privacy link	STORE_BOTTOM_CUST_PRIVACY	none	Use to display privacy link (HTML link) at the bottom of Customer UI

Customer UI Process Flows

This appendix contains information on the page process flows in the Customer UI of Oracle iStore 11i.

Main topics in this appendix include:

- [Process Flow for Specialty Stores](#)
- [Process Flow for Product Search](#)
- [Process Flow for the Shopping Cart](#)
- [Process Flow for Saving Carts](#)
- [Process Flow for Cart Sharing](#)
- [Process Flow for Shopping Lists](#)
- [My Carts Page Process Flow](#)
- [My Quotes Page Process Flow](#)
- [Process Flow for B2B Checkout](#)
- [Process Flow for B2C Checkout](#)
- [Process Flow for Customer Account](#)
- [Process Flow for Customer Profile](#)
- [Process Flow for Tracking Orders and Invoices](#)

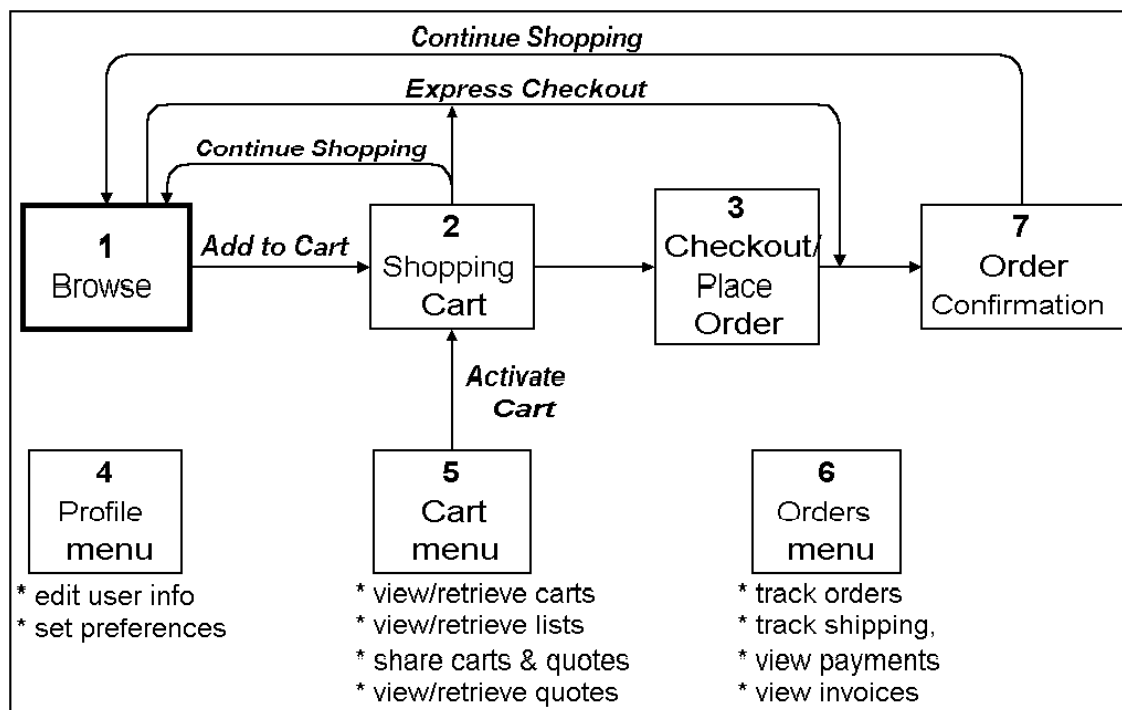
F.1 Process Flow for Specialty Stores

The flow through your specialty stores must follow a certain path, as shown in the following top-level diagram and related detail diagrams. Oracle iStore provides

templates you can use for the pages illustrated in the diagrams. For more information, see:

- [Chapter 8, "Implementing Customer UI Display"](#)
- [Appendix D, "Advanced Display"](#)
- [Appendix E, "Display Templates and Media Objects"](#)

Figure F-1 Process Flow for Specialty Stores



F.1.0.1 Process Flow for Specialty Stores

1. Customers enter the store (1) and browse through the store pages, optionally searching for products.
2. Customers can add items to the shopping cart (2) and then check out with the cart (3) to place the order.
3. Customers can also retrieve saved and shared shopping carts and quotes, as well as shopping lists using the **Cart** icon (5).

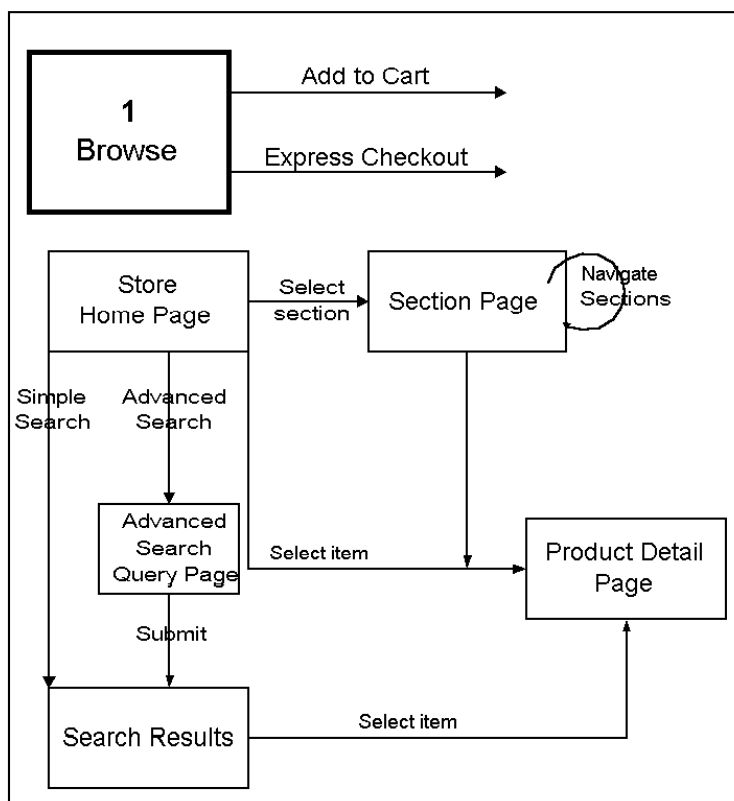
4. **Continue Shopping** takes the customer back to the Store Home Page.
5. Customers can select **Profile** to set their preferences, access their address data, and reset their passwords (4).
6. Customers can also retrieve their account information --- including orders, invoices, payment information --- by accessing the **Orders** menu (6).
7. The checkout process takes customers to the confirmation page (7). See [Section 11.3.1, "Checkout/Order Placement Process Flow"](#), for more information.
8. Customers can click **Express Checkout** to omit the shopping cart and checkout process; express checkout orders are picked up by a concurrent program and submitted automatically. See [Section 11.3.8, "Express Checkout"](#), for more information.

F.2 Process Flow for Product Search

The customer enters the store at the Store Home Page, optionally searches for information, and browses through pages that display sections and product information. The following diagram shows the required flows your templates must follow in this section of the store.

Implementing this functionality is described in [Section 6.8, "Setting up Product Search for the Customer UI"](#).

Figure F–2 Process Flow for Product Search



F.2.0.2 Process Flow for Product Search

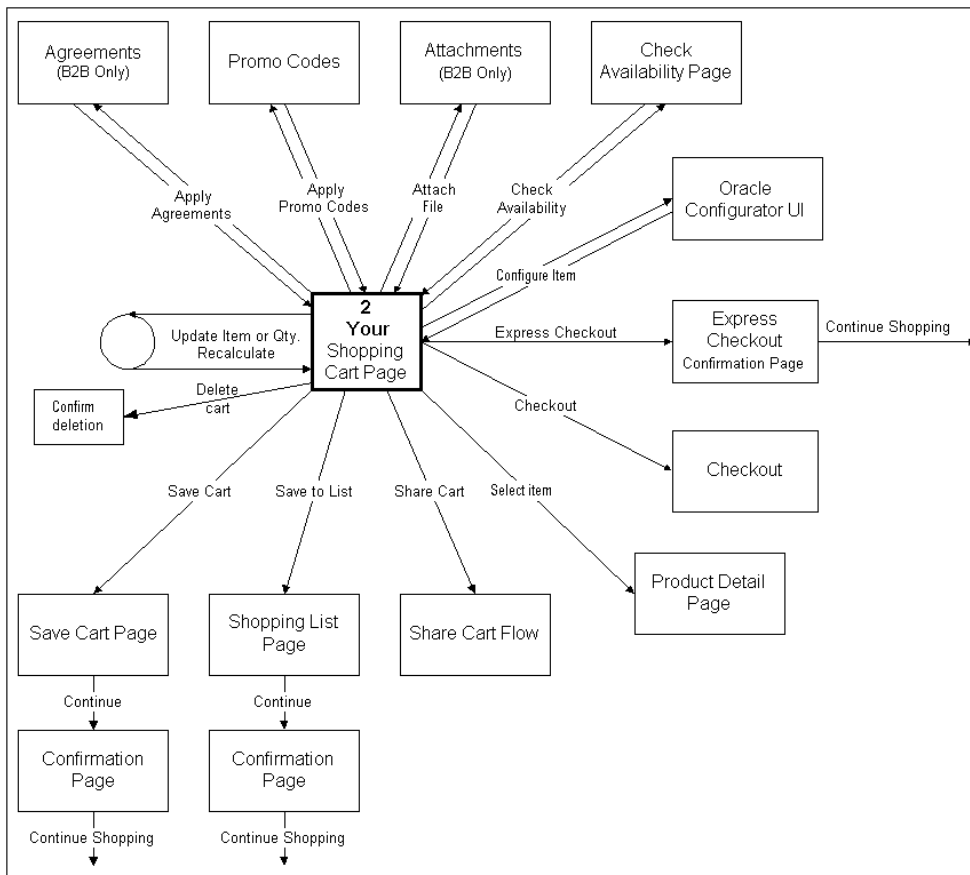
1. Customers enter the store at the **Store Home Page**. Customers view groupings of products called sections, and can navigate through the sections to find products.
2. From the **Store Home Page**, customers can conduct a **Simple Search** to find products.
3. From the **Store Home Page**, customers can also conduct an **Advanced Search**.
4. In the search **Results** page, customers may select a product to review detailed product information.
5. Customers can Add to Cart and perform Express Checkout (if enabled) from section and product detail pages.

F.3 Process Flow for the Shopping Cart

The following diagram shows the high-level shopping cart flow. See the related detail flows for more information:

- [Section F.4, "Process Flow for Saving Carts"](#)
- [Section F.5, "Process Flow for Cart Sharing"](#)
- [Section F.6, "Process Flow for Shopping Lists"](#)
- [Section F.7, "My Carts Page Process Flow"](#)
- [Section F.8, "My Quotes Page Process Flow"](#)

Figure F–3 Process Flow for the Shopping Cart



F.3.0.3 Process Flow for the Shopping Cart

1. While browsing the store, customers add products to their shopping carts. When customers add a product, the **Your Shopping Cart** page is displayed. This is the customer's active cart. Customers can review the items in the cart and perform other cart-related actions, including:
 - a. **Drill-down to item details** --- Customers can select the item name hyperlink to drill down into product details.
 - b. **Update items or quantity/recalculate** --- Customers can change quantities and remove items from the cart at any time. After changing quantities,

customers can select the **Recalculate** button, and Oracle iStore automatically recalculates the cart amounts.

- c. **Delete the cart** -- Customers can press the **Delete Cart** button to delete the cart.
- d. **Save the cart** --- Customers can press the **Save Cart** button to explicitly save the cart with a name. See [Section F.4, "Process Flow for Saving Carts"](#), and [Section 11.1.4, "Active/Saved Carts Process Flow"](#)
- e. **Share the cart** --- If the administrator has enabled this functionality, customers can press the **Share Cart** button to begin the process of sharing the cart with other customers. See [Section F.5, "Process Flow for Cart Sharing"](#), and [Section 11.2.4, "B2B Shared Cart Retrieval Process"](#)/[Section 11.2.5, "B2C Shared Cart Retrieval Process"](#)
- f. **Save items to shopping list** --- If the administrator has enabled this functionality, customers can press the **Save to List** button to save the items in the cart to a shopping list. See [Section F.6, "Process Flow for Shopping Lists"](#), and [Section 11.1.14, "Shopping Lists"](#)
- g. **Use Express Checkout** --- If the administrator has enabled this functionality, customers can press the **Express Checkout** button to submit the cart as an express checkout order. See [Section 11.3.8, "Express Checkout"](#)
- h. **Check item availability** --- If the administrator has enabled this functionality, customers can select **Check Availability** to check the availability of products in the cart. See [Section 11.1.13, "Checking Item Availability in Shopping Carts"](#)
- i. **Enter promotion codes** --- If the administrator has enabled this functionality, customers can select **Promotion Codes** to enter pre-defined promotion codes. See [Section 11.1.11, "Using Promotion Codes in Shopping Carts"](#)
- j. **Select pricing agreements (B2B only)** --- If the administrator has enabled this functionality, customers can select **Agreements** to enter pre-defined pricing agreements. See [Section 11.1.10, "Using Pricing Agreements in Shopping Carts"](#)
- k. **Add attachments (B2B only)** --- See [Section 11.1.12, "Using Attachments in Shopping Carts"](#)
- l. **Configure items** --- See [Section 22.3, "Oracle iStore Functionality with Oracle Configurator"](#)

- m. **Checkout** --- Customers can then choose to checkout (see [Section F.9, "Process Flow for B2B Checkout"](#), and [Section F.10, "Process Flow for B2C Checkout"](#)) or continue shopping and are returned to the Store Home Page.

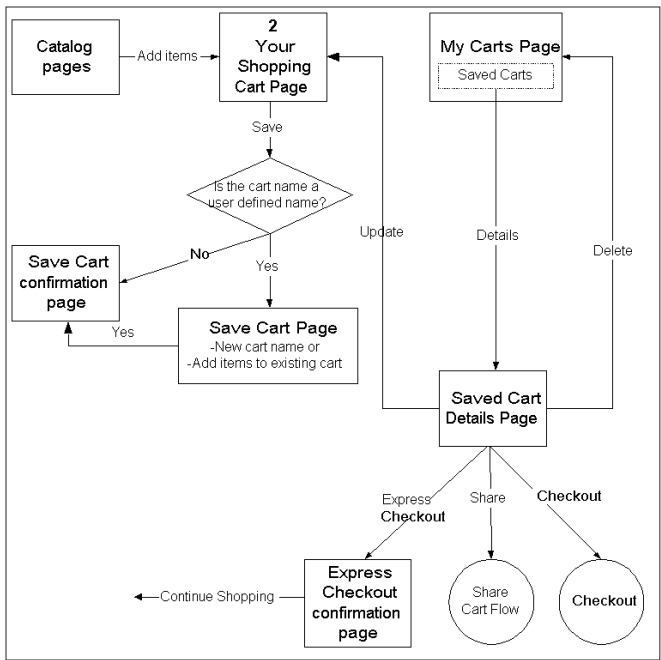
F.4 Process Flow for Saving Carts

Both B2B and B2C customers can save a shopping cart at any time by selecting the **Save Cart** button in the **Your Shopping Cart** page (this is the active cart).

Oracle iStore automatically saves carts with default names, if the customer does not explicitly save them. See [Section 11.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.

Following is the process flow for saving carts.

Figure F–4 Cart Saving Process Flow



F.4.0.4 Process Flow for Saving Carts

1. Customers press the **Save Cart** button in the **Your Shopping Cart** page.

If the cart has already been saved/named by the customer, then the cart is simply re-saved when the customer presses the **Save Cart** button. Pressing the **Save Cart** button de-activates the cart, and a new, active cart becomes available.

2. If the customer saves the cart and the cart does not yet have a user-defined name, after selecting the **Save Cart** button, the user is given the following choices in the **Save Cart** page:
 - a. **Create a new saved cart**
 - b. **Add items to an existing cart**
3. Customers receive confirmation when the cart is saved.
4. Customers can then press the **Continue Shopping** button to continue browsing the specialty stores.
5. To retrieve saved carts, customers navigate to the **My Carts** page within the **Cart** menu. In the *Saved Carts* area of the page, customers select the cart name hyperlink to retrieve the **Saved Cart Details** page.
6. From the **Saved Cart Details** page, customers can use Express Checkout, share the cart, check out, or delete the cart.
7. To activate and potentially modify the cart, the customer presses the **Update** button. The cart then becomes the active cart and the page is named **Your Shopping Cart**.

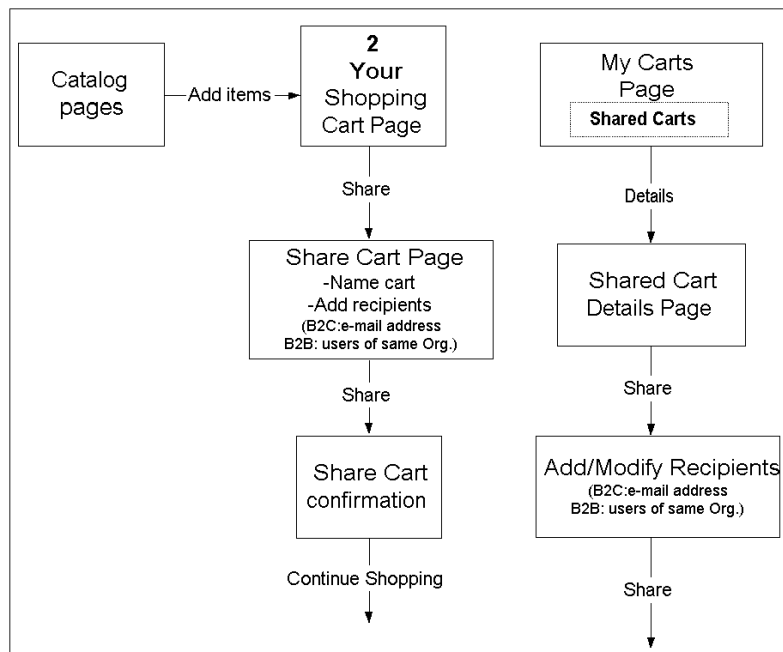
F.5 Process Flow for Cart Sharing

Share cart functionality is available for both B2B and B2C customers.

Implementation of this functionality is described in [Section 11.2, "Shopping Cart Sharing"](#).

The following figure show the cart sharing flow.

Figure F–5 Cart Sharing Process Flow



F.5.0.5 Cart Sharing Process Flow

1. Customers can press the **Share Cart** button in the **Your Shopping Cart** and **Saved Cart Details** pages to share the cart with other customers at any time, up until the review and place order process.
2. Customers then select recipients:
 - a. In a B2B scenario, the cart owner selects from recipients who are registered iStore users in the same organization and using the same account number.
 - b. In a B2C scenario, the cart owner enters recipients' names and valid e-mail addresses.
3. Customers select access levels for the recipients. See [Section 11.2.3, "Shared Cart Access Levels"](#), for more information.
4. After customers enter recipients and their access levels and save the selections, a confirmation page is displayed.

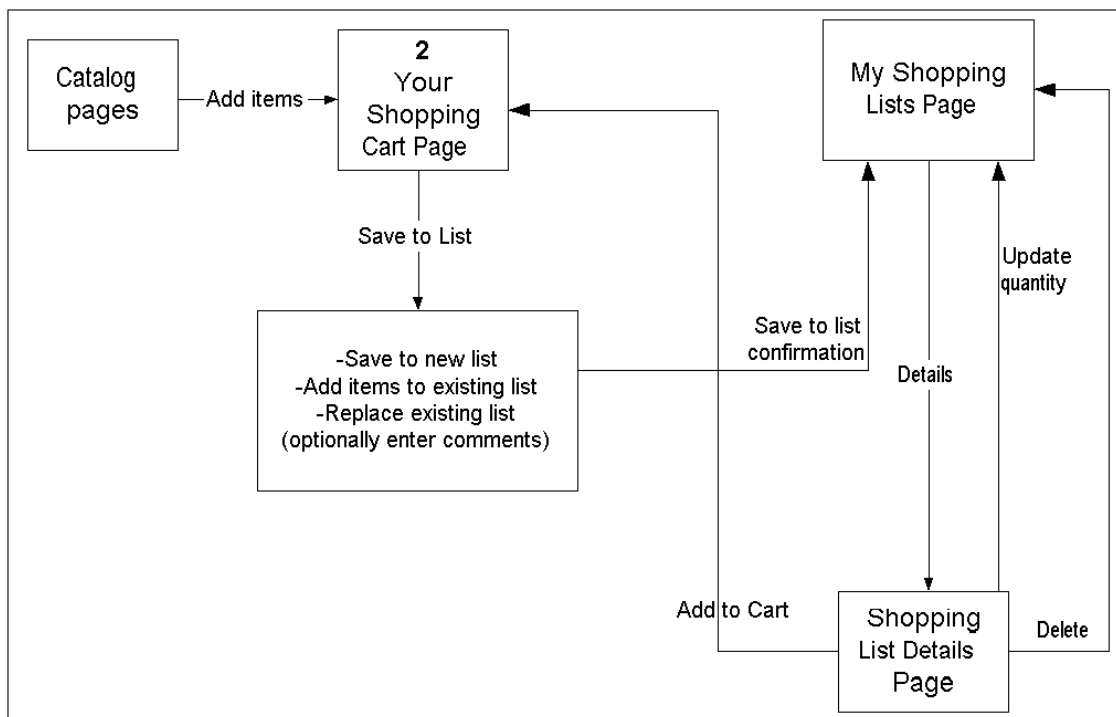
5. The shared cart recipients receive an e-mail with instructions detailing how to access the shared carts.
6. To retrieve the shared cart, customers can either select the URL hyperlink in the e-mail notification or navigate to the **My Carts** page, where they can select the shared cart name hyperlink (B2B users) or enter the shared cart retrieval number (B2C users).

See [Section 11.2.4, "B2B Shared Cart Retrieval Process"](#), and [Section 11.2.5, "B2C Shared Cart Retrieval Process"](#), for additional details of the retrieval process.

F.6 Process Flow for Shopping Lists

Shopping lists enable customers to store items that they may wish to purchase or that they purchase repeatedly. Following is the shopping lists process flow.

Figure F–6 Shopping Lists Process Flow

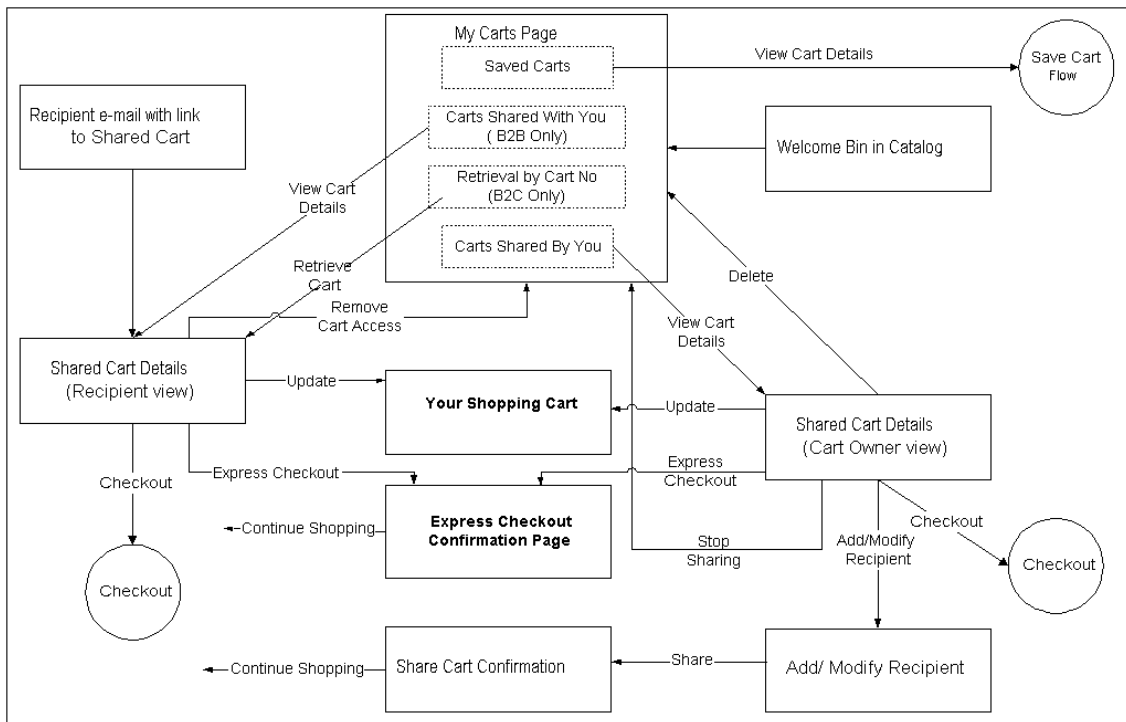


F.6.0.6 Process Flow for Shopping Lists

1. The customer presses the **Save To List** button in the **Your Shopping Cart** page.
2. The system prompts the customer to enter a new name for the list or to merge the items to an existing list (if one exists).
3. Optionally, the customer can enter comments for the list in the **Comments** textbox.
4. To retrieve a shopping list, the customer navigates to the **My Shopping Lists** page within the **Cart** menu, and selects the hyperlink of the desired list name. The **Shopping List Details** page appears.
5. To add items to a cart, in the **Shopping List Details** page, the customer selects the appropriate items in the shopping list and presses the **Add to Cart** button.
6. Optionally, in the **Shopping List Details** page, the customer can also:
 - Update item quantities by entering the numerical values in the **Quantity** field and pressing the **Update Quantity** button.
 - Delete items in the list by activating an item's **Select** checkbox and pressing the **Delete** button (not the Delete List button).
 - Drill down to product details by selecting the item name hyperlink. At this point, the customer can add item(s) to a new cart and checkout, including Express Checkout.
 - Delete the entire list by selecting the **Delete List** button.

F.7 My Carts Page Process Flow

The **My Carts** page is the entry point for most of the actions that customers can perform with carts. The following diagram shows the actions from the **My Carts** page.

Figure F–7 My Carts Page Process Flow

F.7.0.7 My Carts Page Process Flow

1. To view a list of saved or shared carts, both B2B and B2C registered customers select the **Cart** icon in the Customer UI, and then select the **My Carts** subtab.

The main sections on the **My Carts** page are:

- **Saved Carts**
- **Carts Shared By You**
- **Carts Shared With You (B2B only)**
- **Cart Retrieval Textbox (B2C only)**

2. To access details of the carts, the customer selects the cart name hyperlink.
3. In the **Saved Cart Details** and **Shared Cart Details** pages, customers can view cart details.

For more details on the save cart flow, see [Section F.4, "Process Flow for Saving Carts"](#). For additional information on working with carts, see [Section F.3, "Process Flow for the Shopping Cart"](#), and [Section 11.1, "Shopping Carts"](#).

4. In the **Shared Cart Details** page, the actions the customers can perform depend upon whether the customers are recipients or owners of the carts -- if they are recipients, their actions are limited to those determined by the access levels set by the shared cart owner.

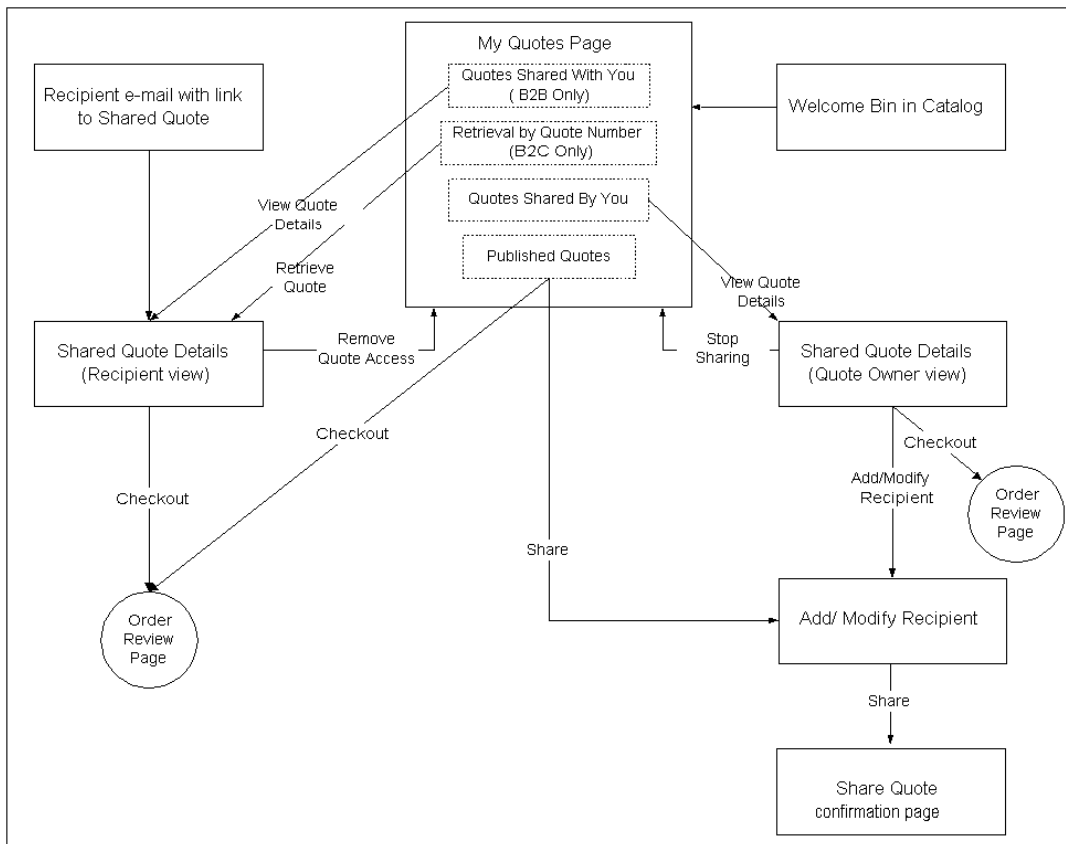
See [Section F.5, "Process Flow for Cart Sharing"](#), for details of the share cart flow. For additional information on cart sharing, see [Section 11.2, "Shopping Cart Sharing"](#).

F.8 My Quotes Page Process Flow

The **My Quotes** page is the entry point for quote-related activities.

Quotes can originate from shopping carts that have become quotes when the customer requested Salesrep Assistance in the **Checkout: Review and Place Order** page, or they can be quotes published through the quote publishing feature of Oracle Quoting.

The following diagram shows the actions possible from the **My Quotes** page.

Figure F–8 My Quotes Page Process Flow**F.8.0.8 My Quotes Page Process Flow**

1. To view a list of saved or shared quotes, both B2B and B2C registered customers select the **Cart** icon in the Customer UI, and then select the **My Quotes** subtab.

The main sections on the **My Quotes** page are:

- **Saved Quotes**
- **Quotes Shared By You**
- **Quotes Shared With You (B2B only)**
- **Quote Retrieval Textbox (B2C only)**

2. To access quote details, the customer selects a quote name hyperlink.
3. In the **Saved Quote Details** and **Shared Quote Details** pages, customers can view details of the quotes.

Published quotes and quotes created through the Sales Representative Assistance feature become Saved Quotes. See [Section 26.2, "Oracle iStore Functionality with Oracle Quoting"](#), for more information about quote publishing, and [Section 13.2, "Setting up Sales Assistance"](#), for more information about the Sales Assistance flows.

4. In the **Shared Quote Details** page, the actions the customers can perform depend upon whether the customers are recipients or owners of the quotes -- if they are recipients, their actions are limited to those determined by the access levels set by the shared quote owner.
5. Quote owners can:
 - a. **Stop Sharing**
 - b. **Modify Payment Information**
 - c. **Checkout/Place Order**
 - d. **Modify Recipients and Access Levels**
6. In addition to viewing quote details, quote recipients can perform the following actions on the shared quote, depending on their access levels:
 - a. **Remove Quote Access**
 - b. **Modify Payment Information**
 - c. **Checkout/Place Order**

For more information, see [Section 11.2.6, "Quote Sharing"](#).

F.9 Process Flow for B2B Checkout

B2B customers who are ready to place their orders go to the checkout area of the store, where they enter shipping and payment information.

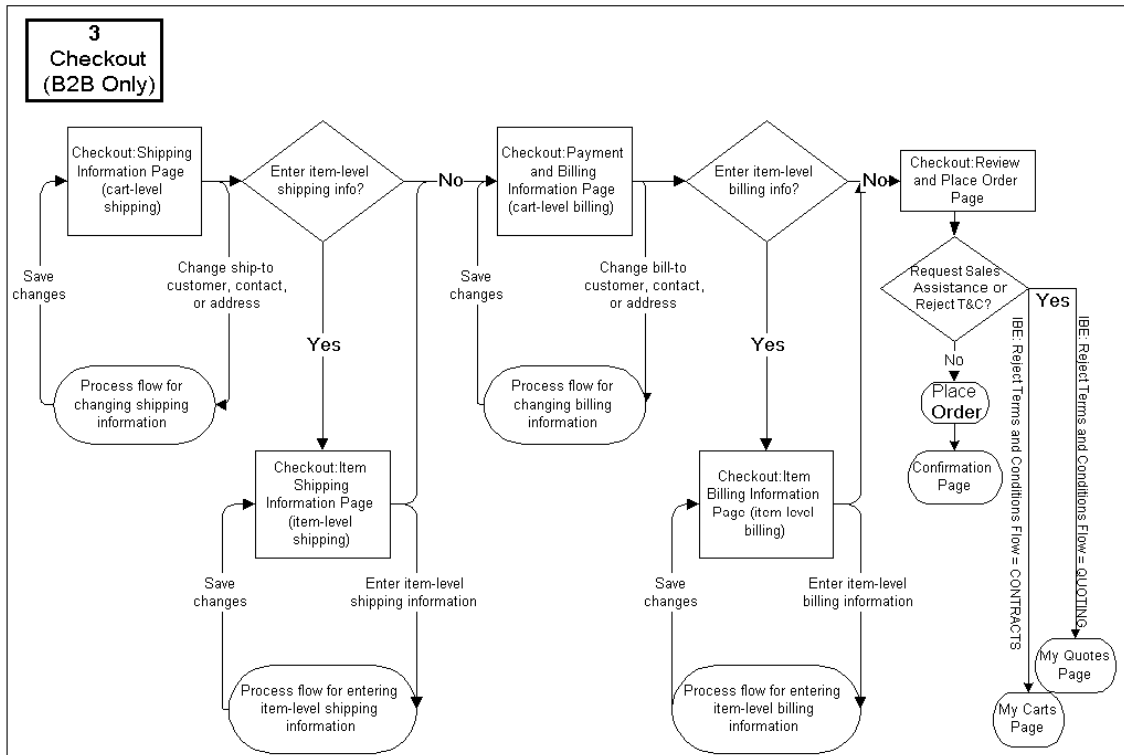
This section contains the following topics:

- [Section F.9.1, "Changing B2B Shipping Information"](#)
- [Section F.9.2, "Entering Item-Level Shipping Information"](#)
- [Section F.9.3, "Changing B2B Billing Information"](#)

- [Section F.9.4, "Entering Item-Level Billing Information"](#)
- [Section F.9.5, "Using Commitments During Checkout"](#)

The following diagram shows the required flows your templates must follow in this section of the store.

Figure F–9 Process Flow for B2B Checkout



F.9.0.9 Process Flow for B2B Checkout

The following is the process flow for B2B checkout:

1. When B2B customers proceed to checkout by pressing the **Checkout** button, they begin in the **Checkout: Shipping Information** page, where they enter the cart-level shipping information using the [Changing B2B Shipping Information](#) page flow.

2. B2B customers specify whether they wish to enter item-level shipping information by answering **Yes** or **No** to a question in the **Checkout: Shipping Information** page -- if they answer **No**, they continue to the **Checkout: Payment and Billing Information** page.
3. If they answer **Yes** to the enter item-level shipping information question, they continue to the **Checkout: Item Shipping Information** page and use the [Entering Item-Level Shipping Information](#) process flow.
4. When they finish entering the item-level shipping information, they return to the **Checkout: Item Shipping Information** page and then continue to the **Checkout: Payment and Billing Information** page.
5. In the **Checkout: Payment and Billing Information** page, B2B customers enter cart-level payment and billing information for the order using the [Changing B2B Billing Information](#) page flow.
6. B2B customers specify whether they wish to enter item-level billing information by answering **Yes** or **No** to a question in the **Checkout: Billing Information** page -- if they answer **No**, they continue to the **Checkout: Review and Place Order** page.

If B2B customers choose Invoice or Cash as the payment method and do not enter a purchase order number, then they can also specify whether they need to enter item-level billing information.

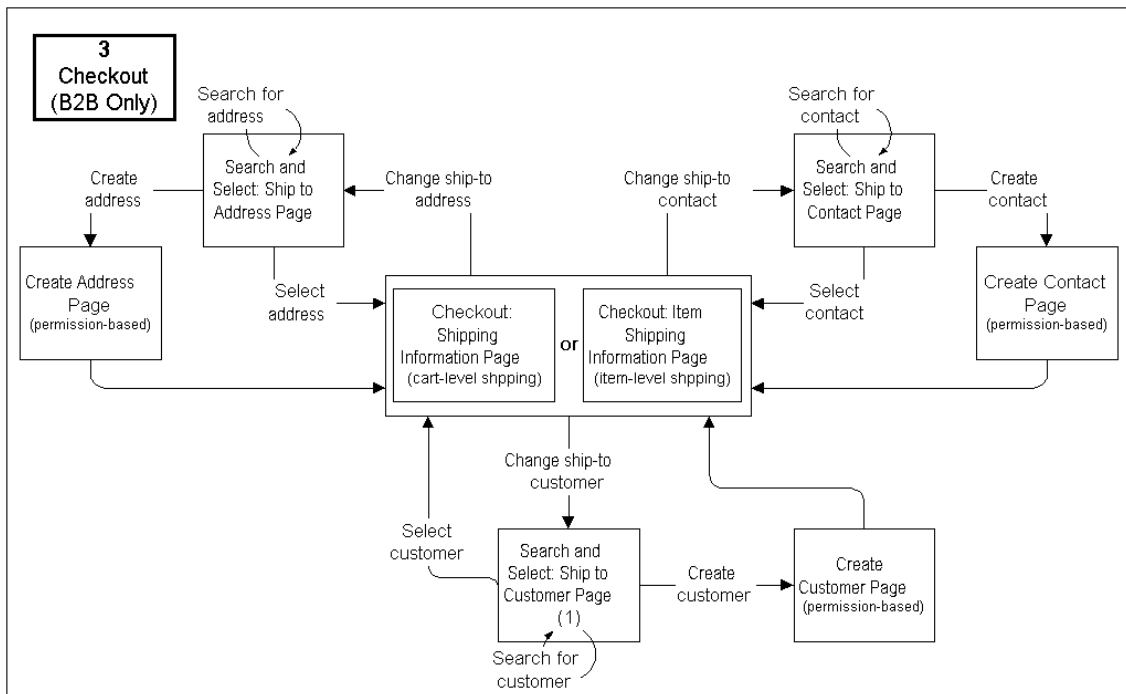
7. When they answer **Yes** to the enter item-level shipping information question, they continue to the **Checkout: Item Billing Information** page and use the [Entering Item-Level Billing Information](#) page flow.
8. When they finish entering the item-level billing information, they return to the **Checkout: Item Billing Information** page and then continue to the **Checkout: Review and Place Order** page.
9. In the **Checkout: Review and Place Order** page, B2B customers can place the order by selecting the **Place Order** button.
10. If customers press the **Need Salesrep Assistance** button in the **Checkout: Review and Place Order** page, they select a reason for requesting assistance and optionally enter comments in the **How can we assist you in finalizing your order?** page. If the cart is unsaved, the customer must enter a cart name. After submission, the cart becomes a quote on the **My Quotes** page. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.

11. The customers also can review/reject Terms and Conditions from the **Checkout: Review and Place Order** page. See [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#), and [Section 26.2.1, "Sales Assistance with Terms and Conditions Rejection"](#), for more information.
12. After placing the order, customers can click **Continue Shopping** to browse the specialty stores and potentially add more items to shopping carts.

F.9.1 Changing B2B Shipping Information

B2B customers can change and create their ship-to customer, contact, and address at checkout if they have the required permissions. The following diagram shows the required flows your templates must follow in this section of the store.

Figure F–10 Process Flow for Changing B2B Shipping Information



F.9.1.1 Process Flow for Changing B2B Shipping Information

1. In the **Checkout: Shipping Information** page and the **Checkout: Update Item Shipping Information** pages, B2B customers (with the required user role permissions) can change the ship-to customer, contact, or address.
2. If B2B customers choose to change the ship-to customer, the **Search and Select: Ship to Customer** page is displayed. In the **Search and Select: Ship to Customer** page, customers can search for and select the ship-to customer. When finished, they return to the **Checkout: Shipping Information** page.

Customers with the required user permissions can also create a new ship-to customer from the **Search and Select: Ship to Customer** page. In this case, the **Create Customer** page is displayed, where users enter information to create the ship-to customer. When finished, they return to the **Checkout: Shipping Information** page.

3. If B2B customers choose to change the ship-to contact, the **Search and Select: Ship to Contact** page is displayed. In the **Search and Select: Ship to Contact** page, customers can search for and select the ship-to contact. When finished, they return to the **Checkout: Shipping Information** page.

Customers with the required user permissions can also create a new ship-to contact from the **Search and Select: Ship to Contact** page. In this case, the **Create Contact** page is displayed, where users enter information to create the ship-to contact. When finished, they return to the **Checkout: Shipping Information** page.

4. If B2B customers choose to change the ship-to address, the **Search and Select: Ship to Address** page is displayed. In the **Search and Select: Ship to Address** page, users can search for and select a ship-to address. When finished, they return to the **Checkout: Shipping Information** page.

Customers with the required user permissions can also create a new ship-to address from the **Search and Select: Ship to Address** page. In this case, the **Create Address** page is displayed, where customers enter ship-to address information. When finished, they return to the **Checkout: Shipping Information** page.

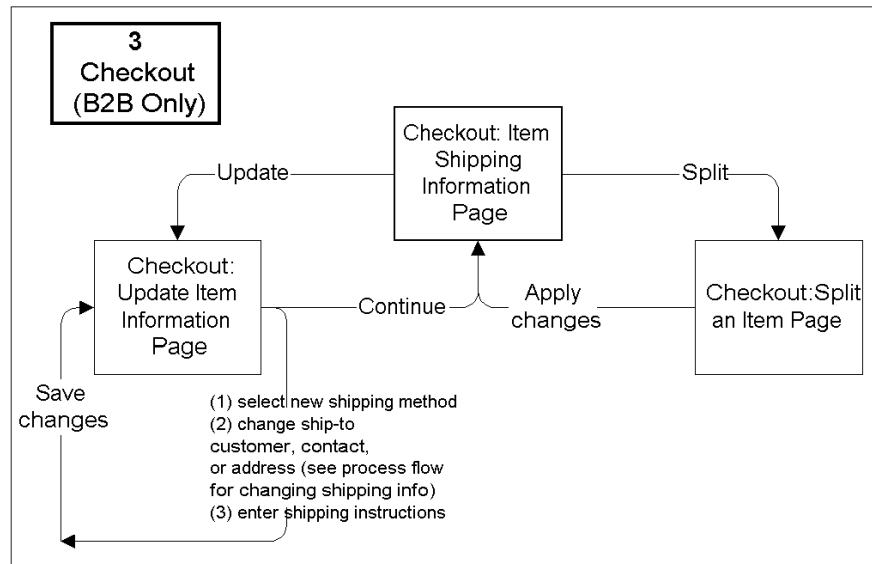
5. When finished with the shipping information entry, customers press **Continue Checkout** to continue to the **Checkout: Payment and Billing Information** page.

See [Section 12.3.4, "Seeded Oracle iStore User Permissions Descriptions"](#), for details of the permissions required in the user roles to change and create shipping information.

F.9.2 Entering Item-Level Shipping Information

During checkout, customers can enter separate shipping information for different items in their shopping carts, if this functionality has been enabled (see [Section 10.10.3, "Allowing Item-Level Shipping Methods"](#)). The following diagram shows the flow for B2B item-level shipping information.

Figure F–11 Process Flow for Item-Level Shipping Information



F.9.2.1 Process Flow for Entering Item-Level Shipping Information

1. During checkout, from the **Checkout: Shipping Information** page, B2B customers can enter separate shipping information for different items in their shopping carts, if this functionality has been enabled (see [Section 10.10, "Setting up Shipping Functionality"](#)).
2. Once they enter the item-level shipping information flow, B2B customers can view item-level shipping information in the **Checkout: Item Shipping Information** page.
3. To update the shipping details of a specific item, customers select the item and press the **Update Item Shipping Details** button -- this retrieves the **Checkout: Update Item Shipping Information** page for the item selected. From the update page, customers can: (1) select a new shipping method; (2) change

ship-to customer, contact, or address, providing they have the required user role permissions; and (3) enter shipping instructions, if this functionality has been enabled (see [Section 10.10.4, "Allowing Users to Enter Shipping Information"](#)). When finished, the users return to the **Checkout: Item Shipping Information** page.

4. If a customer has ordered more than one quantity of a single item, the items can be "split", to specify different shipping information for each duplicate item. From the **Checkout: Item Shipping Information** page, customers select the **Split** button to retrieve the **Checkout: Split an Item** page. When they finish splitting the line item, they return to the **Checkout: Item Shipping Information** page -- with the item split into different rows on the page. From this page, the customer can modify the shipping information as described in step 3 above.
5. When finished changing item-level shipping information, the customers return to the **Checkout: Shipping Information** page.
6. Customers press **Continue Checkout** to enter the billing information phase.

F.9.3 Changing B2B Billing Information

B2B customers can change and create their bill-to customer, contact, and address at checkout if they have the required permissions. The following diagram shows the required flows your templates must follow in this section of the store.

```

graph TD
    Title["3 Checkout (B2B Only)"]
    CreateAddr["Create Address Page"]
    SearchAddr["Search and Select: Bill to Address Page"]
    CreateContact["Create Contact Page"]
    SearchContact["Search and Select: Bill to Contact Page"]
    Billing["Checkout: Payment and Billing Information Page  
or  
Checkout: Item Billing Information Page"]
    SearchCustomer["Search and Select: Bill to Customer"]
    CreateCustomer["Create Customer Page"]

    Title --> CreateAddr
    Title --> SearchAddr
    Title --> SearchContact
    Title --> SearchCustomer

    CreateAddr --> Billing
    SearchAddr --> Billing
    SearchContact --> Billing
    SearchCustomer --> Billing

    Billing -- "Change bill-to address" --> SearchAddr
    Billing -- "Change bill-to contact" --> SearchContact
    Billing -- "Change bill-to customer" --> SearchCustomer

    SearchAddr -- "Select address" --> Billing
    SearchContact -- "Select contact" --> Billing
    SearchCustomer -- "Select customer" --> Billing

    SearchCustomer --> CreateCustomer
    CreateCustomer --> Billing
  
```

The flowchart for B2B Checkout (3) illustrates the process of entering billing information. It starts with a central box labeled "3 Checkout (B2B Only)". From this box, four arrows point to the initial steps: "Create address", "Search and Select: Bill to Address Page", "Search for contact", and "Search and Select: Bill to Contact Page". The "Create address" step leads to the "Create Address Page", which then feeds into the "Checkout: Payment and Billing Information Page" (or "Checkout: Item Billing Information Page"). The "Search and Select: Bill to Address Page" step also feeds into this central box, with a "Select address" action indicated. Similarly, the "Search for contact" step leads to the "Create Contact Page", which feeds into the central box, with a "Select contact" action indicated. The "Search and Select: Bill to Contact Page" step also feeds into the central box, with a "Select contact" action indicated. The central box has three outgoing arrows: "Change bill-to address" pointing back to the "Search and Select: Bill to Address Page", "Change bill-to contact" pointing back to the "Search and Select: Bill to Contact Page", and "Change bill-to customer" pointing to the "Search and Select: Bill to Customer" step. The "Search and Select: Bill to Customer" step leads to the "Create Customer Page", which then feeds back into the central box, with a "Select customer" action indicated. The "Search and Select: Bill to Customer" step also has a "Search for customer" action indicated.

1. In the **Checkout: Payment and Billing Information** page and the **Checkout: Item Billing Information** page, B2B customers can choose to change the bill-to customer, contact, or address, depending upon their user role permissions.
2. If B2B customers choose to change the bill-to customer, the **Bill to Customer** page is displayed, where they can search for/select or create a new bill-to customer.

When finished, they return to the **Checkout: Payment and Billing Information** page or the **Checkout: Item Billing Information** page.

- Customer UI Process Flows F-23

If B2B customers choose to create a bill-to contact in the **Bill to Contact** page, the **Create Contact** page is displayed.

When finished, they return to the **Checkout: Payment and Billing Information** page or the **Checkout: Item Billing Information** page.

4. If B2B customers choose to change the bill-to address, the **Bill to Address** page is displayed, where they can search for/select or create a new bill-to address.

If B2B customers choose to create a bill-to address in the **Bill to Address** page, the **Create Address** page is displayed.

When finished, they return to the **Checkout: Payment and Billing Information** page or the **Checkout: Item Billing Information** page.

5. Customers continue to the **Checkout: Review and Place Order** page.

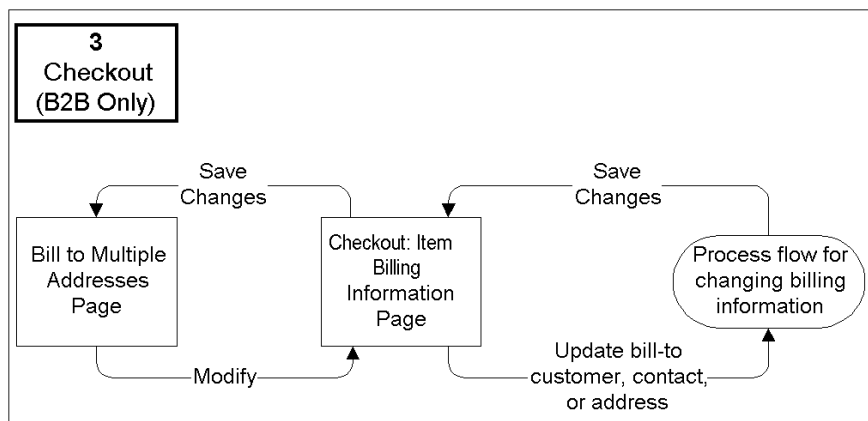
F.9.4 Entering Item-Level Billing Information

During checkout, B2B customers can enter separate billing information for different items in their shopping carts, if this functionality has been enabled (see [Section 10.8, "Setting up Item-Level Billing"](#)).

Note: Payment type must be Cash or Invoice to use item-level billing. Also, when using line level billing, Purchase Order is not supported.

The following diagram shows the flow for B2B item-level billing information.

Figure F-13 Process Flow for Item-Level Billing Information

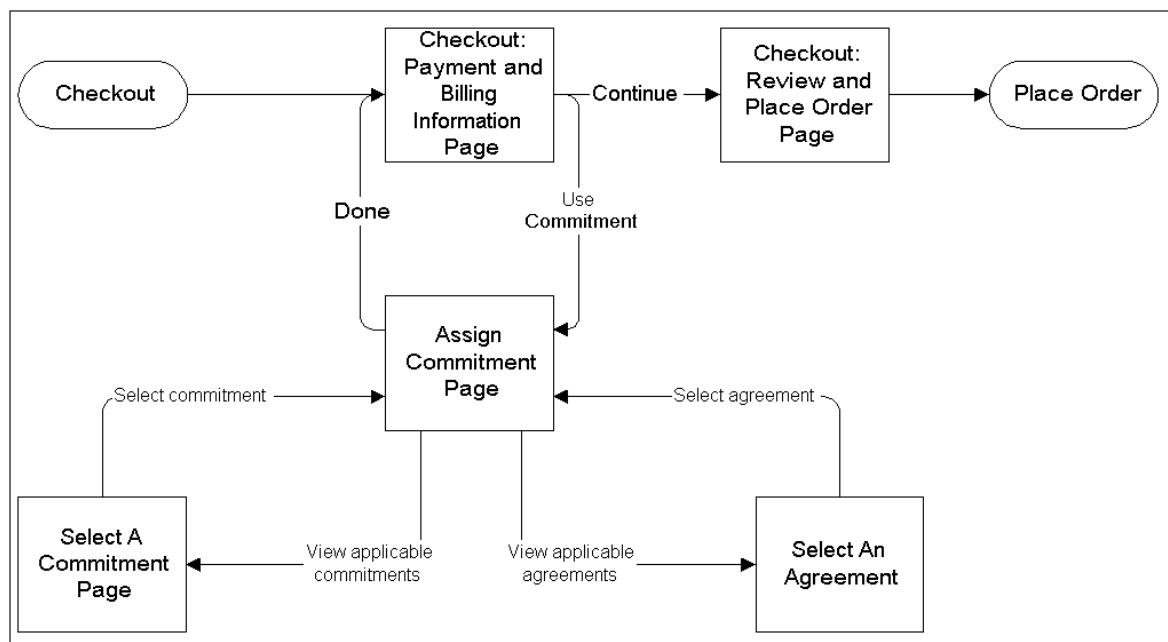


F.9.4.1 Process Flow for Item-Level Billing Information

1. During checkout, from the **Checkout: Billing Information** page, B2B customers can enter separate billing information for different items in their shopping carts, if this functionality has been enabled (see [Section 10.8, "Setting up Item-Level Billing"](#)).
2. If they enter the item-level billing information flow, B2B customers can view item-level billing information in the **Checkout: Item Billing Information** page. If they choose to split an item into multiple lines, they continue to the **Split an Item** page. When they finish splitting the line item, they return to the **Checkout: Item Billing Information** page.
3. When B2B customers select an item in the **Checkout: Item Billing Information** page, the **Checkout: Update Item Billing Information** page for that item is displayed, where the customers can enter item-level billing information. When finished, they return to the **Checkout: Item Billing Information** page.
4. B2B customers can view item-level billing information in the **Checkout: Item Billing Information** page. In the **Checkout: Item Billing Information** page, B2B customers enter the item-level billing information using the [Changing B2B Billing Information](#) page flow. When they finish entering the item-level billing information, they return to the **Checkout: Item Billing Information** page.

F.9.5 Using Commitments During Checkout

When using commitments at checkout, the customer follows the page flow illustrated in the following diagram. Implementing this functionality is described in [Section 9.10, "Pricing Agreements"](#).

Figure F–14 Process Flow for Checkout With Commitments

F.9.5.1 Process Flow for Checkout With Commitments

1. During checkout, a customer enters payment and billing information. To use commitments, in the **Checkout: Payment and Billing Information** page, the customer presses the **Use Commitment** button to select commitments at the item level. The **Assign Commitments** page displays each item.
 - a. For each item, the customer can navigate to a **Commitment List** page that displays the applicable commitments. The applicable commitments are valid for the sold-to customer, and are open commitments and commitments linked to the item. From the **Commitment List** page, the customer selects a commitment to use for an item. If the commitment is linked to an agreement, that agreement is also automatically applied to the item.
 - b. For each item, if pricing agreements are enabled, the customer can also navigate to an **Agreements** page that displays the applicable agreements. Here, the customer selects a pricing agreement to apply to the item.

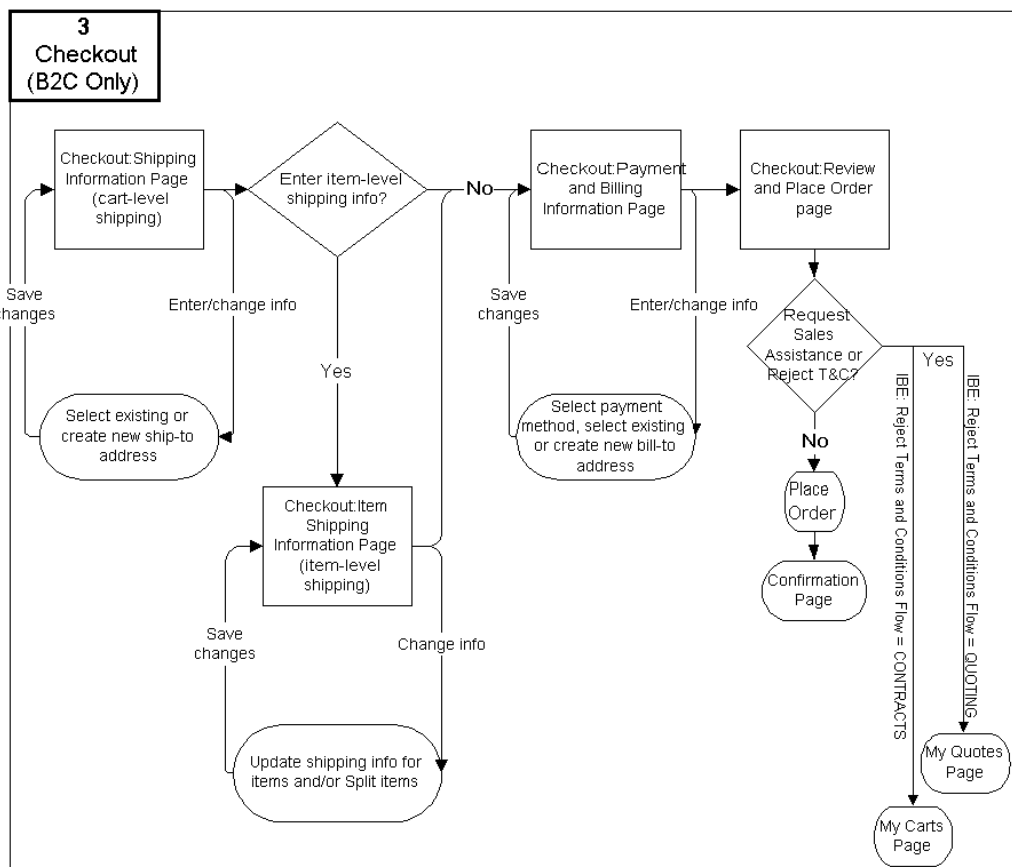
2. In both cases, the selected pricing agreement will also set the payment term and the price list for the cart item. The payment term and price list are specified during the setup of the pricing agreement.
3. When finished, the customer returns to the **Checkout: Payment and Billing Information** page to continue cart checkout.

F.10 Process Flow for B2C Checkout

B2C customers who are ready to place their orders go to the checkout area of the store, where they enter shipping and payment information.

The following diagram shows the required flows your templates must follow in this section of the store.

Figure F–15 Process Flow for B2C Checkout



F.10.0.2 Process Flow for B2C Checkout

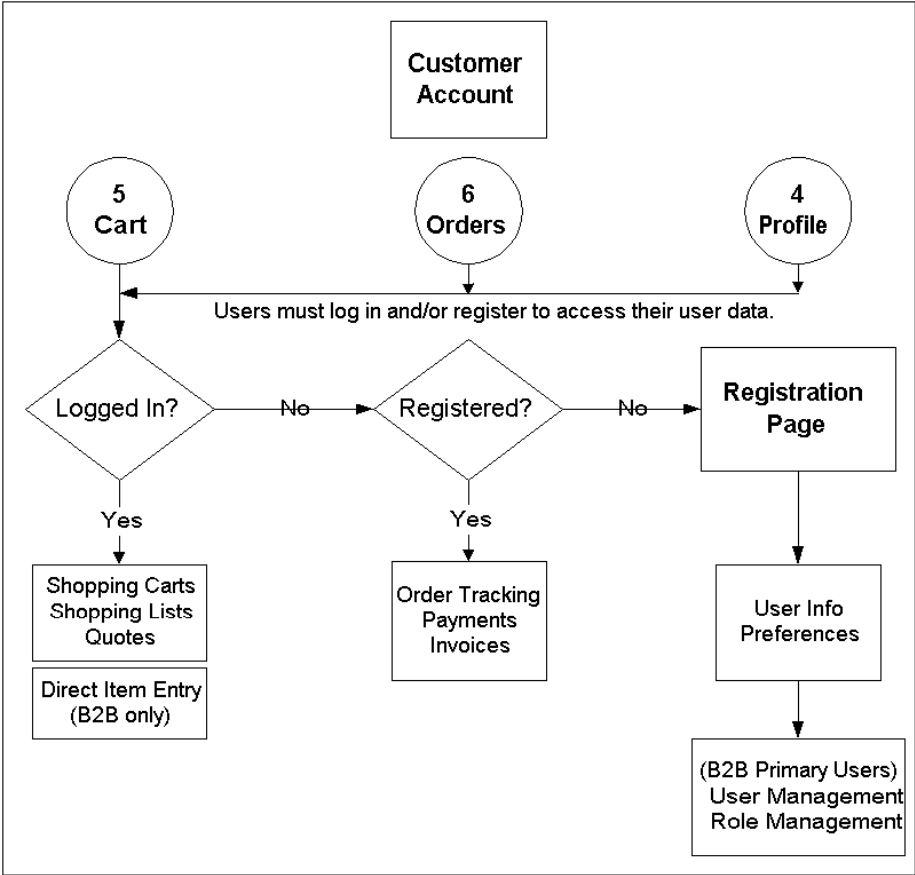
1. When a B2C customer chooses to check out, the **Checkout: Shipping Information** page is the first checkout page displayed. The customer chooses a shipping method, and can either select an existing shipping address or add a new address. Customers also can enter shipping instructions, if this functionality has been enabled (see [Section 10.10.4, "Allowing Users to Enter Shipping Information"](#)).
2. Customers can choose separate shipping details for different items in their carts. If they choose to use item-level shipping, the **Checkout: Item Shipping Information** page is displayed.

3. In the **Checkout: Item Shipping Information** page, customers can update an item's shipping details by selecting the item and pressing the **Update Item Shipping Details** button. This retrieves the **Checkout: Update Item Shipping Information** page for the selected item. From this page they can enter different shipping information for the cart items, with the same options specified in step 1 above.
4. If customers have entered more than one quantity for a single item in their carts, they can "split" the quantities to enter different shipping information for each one (with the same options explained in step 1 above). They do this by pressing the **Split** button from the **Checkout: Item Shipping Information** page.
5. Once finished entering shipping information, the customers return to the **Checkout: Shipping Information** page.
6. Clicking **Continue Checkout** takes customers to the **Checkout: Payment and Billing Information** page. The B2C customer can enter the billing address and payment method here.
7. Clicking **Continue Checkout** starts the payment process and takes the customers to the **Checkout: Review and Place Order** page.
8. From the review page, B2C customers can update quantities, as well as change payment and shipping information.
9. In the **Checkout: Review and Place Order** page, B2C customers can place the order by selecting the **Place Order** button.
10. If customers press the **Need Salesrep Assistance** button in the **Checkout: Review and Place Order** page, they select a reason for requesting assistance and optionally enter comments in the **How can we assist you in finalizing your order?** page. If the cart is unsaved, the customer must enter a cart name. After submission, the cart becomes a quote on the **My Quotes** page. See [Chapter 26, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.
11. The customers also can review/reject Terms and Conditions from the **Checkout: Review and Place Order** page. See [Chapter 28, "Integrating Oracle iStore with Oracle Sales Contracts"](#), and [Section 26.2.1, "Sales Assistance with Terms and Conditions Rejection"](#), for more information.
12. After placing the order, customers can click **Continue Shopping** to browse the specialty stores and potentially add more items to shopping carts.

F.11 Process Flow for Customer Account

Customers can click the **Profile**, **Orders**, or **Cart** icons from any page to update their customer information, check on orders and invoices, work with shopping carts and shopping lists, or directly enter an item to purchase. The following diagram shows the required flows your templates must follow in this section of the store.

Figure F–16 Process Flow for Customer Account



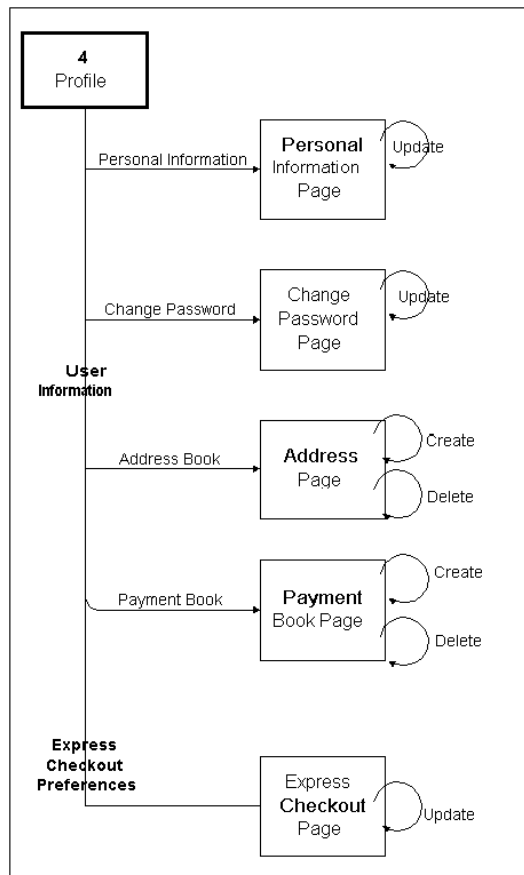
F.11.0.3 Process Flow for Customer Account

1. Within the account menu, customers can select the **Cart** icon (4.1) to view their shopping carts and quotes; B2B customers can use Direct Item Entry. See [Section F.6, "Process Flow for Shopping Lists"](#) to view the expanded diagram.
2. Customers can select the **Orders** icon (4.2) to view information about their orders, such as payment information and shipment tracking. See [Section F.13, "Process Flow for Tracking Orders and Invoices"](#) to view the expanded diagram.
3. Selecting the **Profile** icon takes customers to user information (4.3) and the personal information page. See [Section F.12, "Process Flow for Customer Profile"](#) to view the expanded diagram.
4. B2B primary users can choose **User Management** to create and maintain other users for their organizations.
5. B2B primary customers can choose **Role Management** to create and maintain roles for assignment to other customers in their organizations.

F.12 Process Flow for Customer Profile

Customers manage their own personal, address, and payment information using the **Profile** menu in the Customer UI. The following diagram shows the required flows your templates must follow in this section of the store.

Figure F–17 Process Flow for Customer Profile



F.12.0.4 Process Flow for Customer Profile

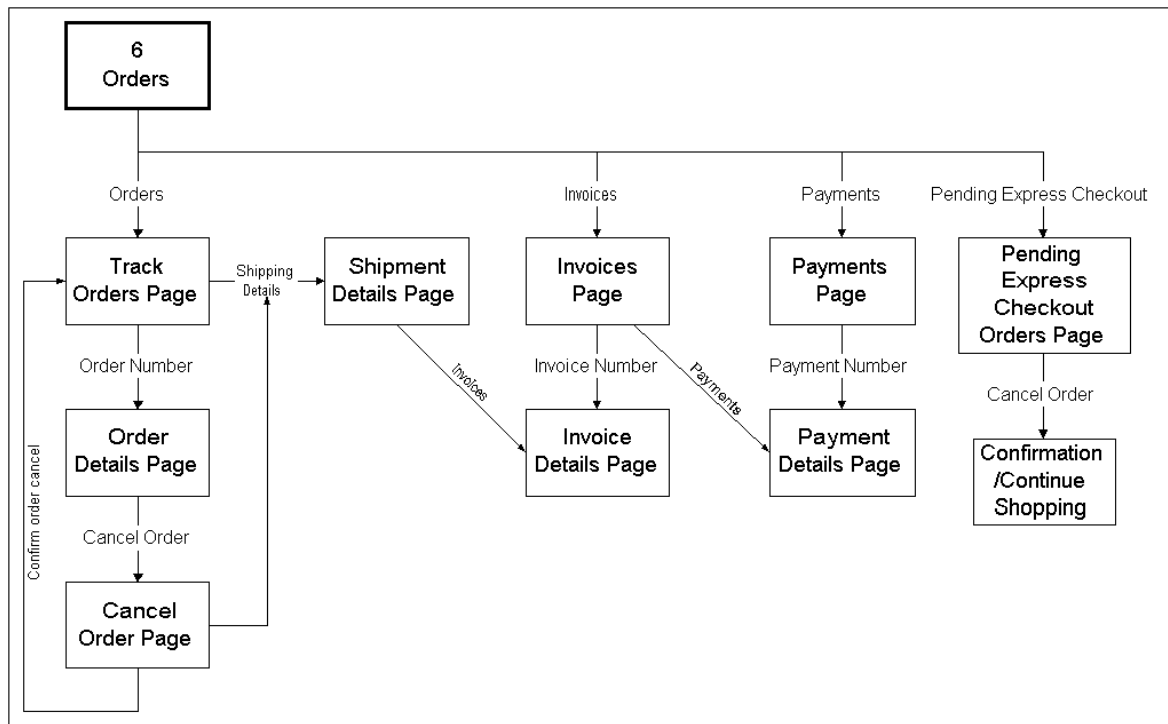
1. When customers select the **Profile icon** to edit their information, the **User Information** subtab provides links to the following:
 - a. **Personal Information** page, where users can enter/change their personal information -- such as name, default e-mail address, and phone/fax numbers.
 - b. **Change Password** page, where they can enter a new password. The password must be at least six characters long.

- c. **Address Book** page, where customers can review/edit existing addresses or create new addresses. In the **Create Address** page, they can flag an address as the preferred billing/shipping address.
 - d. **Payment Book** page, where customers can review/edit existing or create new payment methods and related information. They can also flag a payment method as the default method.
 - e. **Preferences** page, where customers can select a preferred shipping method and set opt in/opt out preferences.
2. If Express Checkout is enabled by the administrator, customers can select the **Express Checkout Preferences** subtab to set these preferences.

F.13 Process Flow for Tracking Orders and Invoices

Customers can select **Orders** to review their orders, invoices, and shipping status. The following diagram shows the required flows your templates must follow in this section of the store.

Figure F–18 Process Flow for Tracking Orders and Invoices



F.13.0.5 Process Flow for Tracking Orders and Invoices

1. Customers choose **Orders** and the **Track Orders** page displays status information for their purchased orders. From this page, customers can search for orders if desired. Customers can select an **Order Number** hyperlink to view the order details.
2. From the **Track Orders** page, customers may select the **Shipping Details** icon to view shipment details.
3. Customers choose **Pending Express Checkout** to view a list of Express Checkout orders that have not yet been submitted by the concurrent program. If the orders have not yet been submitted, the customer can press **Cancel** to cancel an order.
4. Customers choose **Invoices** to view a list of their invoices with payment and order information. Customers can select the **Invoice Number** hyperlink to view the details for an invoice.

5. Customers choose **Payments** to view payment historical summary. Customers can select the **Payment Number** hyperlink to view details of specific payments.

Decommissioning Self-Service UI

The Oracle iStore Self-Service User Interface (UI) was formally decommissioned beginning with Release 11.5.9, and is no longer supported. However, greater functionality is provided through the use of the Store Administration UI and other integrating Oracle applications. This appendix contains support information for migrating away from the Self-Service UI, including how to perform the same or similar tasks with the current Oracle iStore application, as well as other Oracle applications.

Main topics in this appendix include:

- [Background](#)
- [Before You Install Oracle iStore Release 11.5.9](#)
- [Achieving Identical Functionality with Current Applications](#)

G.1 Background

Before Oracle iStore Release 11.5.9 (IBE.O patchset), two distinct user interfaces (UIs) were provided in order to administer Oracle iStore:

- **Merchant UI** --- Now called the Store Administration UI, this UI was for advanced users.
- **Self Service** --- Now decommissioned, this UI was for basic (non-advanced) users.

The iStore Self-Service Administration UI enabled easy deployment of Oracle iStore with a point-and-click user interface, but it had the following limitations:

- Support only the new Oracle iStore 11i implementations
- Support only one store

- Support only B2C accounts
- No support for simultaneous use of the Oracle iStore 11i Merchant UI and self service administration. This restriction was true even if you originally set up your store in the iStore Self-Service Administrator UI.
- Support only the use of seeded Oracle iStore 11i templates
- Support only U.S. tax set up
- Support only price override and percentage discounts
- Support only flat and percentage freight charges based on order amounts.
- Starting from IBE.O, the Self Service Administration UI is no longer supported.

Greater functionality is provided by using Oracle iStore Release 11.5.9 (IBE.O) and other modules of the Oracle E-Business Suite, along with Oracle ERP applications, without the limitations mentioned above.

See [Section G.3, "Achieving Identical Functionality with Current Applications"](#), for more information.

G.2 Before You Install Oracle iStore Release 11.5.9

Before installing Oracle iStore Release 11.5.9 (IBE.O), make sure the correct storefront is assigned to the Self-Service Administration store.

Only the **active storefront** will be preserved and visible in the Release 11.5.9 (IBE.O) iStore Customer UI.

G.3 Achieving Identical Functionality with Current Applications

You can implement the same functionality as that provided by the Self-Service Administration UI using Oracle iStore Release 11.5.9 (patchset IBE.O), the Oracle E-Business Suite, and other Oracle ERP applications.

The following table, Achieving Identical Functionality with Current Applications, describes in a high-level fashion, how to achieve identical or greater functionality using the current applications.

Table G-1 Achieving Identical Functionality with Current Applications

Functional Area	Self-Service UI Functionality	How to Achieve with Current Applications
U.S. tax setup	The Self Service Administration UI provided the ability to set up U.S. taxes.	Oracle Accounts Receivables provides the same level of functionality. For more information, please refer to the <i>Oracle Receivables User's Guide, Release 11i</i> Financials Family Pack C, August 2002, (Chapter 2 - Setup, Tax Codes and Tax Rates).
Notification updates	The Self Service Administration UI allowed users to edit Workflow notification messages.	The Oracle Workflow client allows the editing of notification messages, providing the same level of functionality. Please refer to the <i>Oracle Workflow Guide, Volume 1</i> , Part No. A95276-04, (Chapter 4, Defining Workflow Process Components).
Profile options setup	In the Self Service Administration UI, iStore profile options were set up based on information captured in the user interface.	The Oracle Applications Object Library (AOL) provides the user interface to set up iStore and non-iStore profile options. For more information, please refer to Section A.2, "How to Set Profile Options" , in this guide, and the <i>Oracle Applications System Administrator's Guide</i> , Part No. A96155-02, (Appendix A, Profile Options in Oracle Application Object Library).
Price lists and discounts / promotions	The Self Service Administration UI provided the ability to manage price lists, and to create discounts and promotions.	The Pricing functionality of Oracle Order Management provides the same level of functionality. Please refer to the <i>Oracle Order Management Suite Implementation Manual, Volume 1 and Volume 2</i> , Part No A95861-01. For information on defining price lists, please refer to Chapter 11, Price Lists, of the Order Management documentation. Also see Chapter 9, "Implementing Pricing" , in this guide. For defining discount and promotions, please refer to Chapter 12, Modifiers, in the Order Management documentation.

Table G–1 Achieving Identical Functionality with Current Applications (Cont.)

Functional Area	Self-Service UI Functionality	How to Achieve with Current Applications
Bill to / ship to country setup	The Self Service Administration UI provided the ability to define bill to and ship to countries for operating units (used for placing store orders).	Oracle Human Resource Management System (HRMS) provides the ability to define bill to and ship to countries for any operating unit. For more information please refer to <i>Using Oracle HRMS - The Fundamentals</i> , Part No. A73315-02, (Chapter 2, Organization Management), and Section 2.9, "Setting up Oracle Human Resources" .
Shipping methods	The Self Service Administration UI allowed the creation of shipping methods.	Oracle Inventory 11i provides the ability to define shipping methods. Please refer to <i>Oracle Inventory User's Guide</i> , Part No. A83507-05 (Chapter 6 - Transaction Set Up). After you define shipping methods, use Oracle Order Management to "web-enable" the shipping methods. See Section 2.11, "Setting up Oracle Order Management" , in this guide.
Freight charges	The Self Service Administration UI allowed the setup of freight charges.	Oracle Order Management 11i provides customers with the ability to set up freight charges. Please refer to <i>Oracle Order Management Suite Implementation Manual, Volume 1</i> , Part No. A95861-01, (Appendix H, Freight and Special Charges).

Table G–1 Achieving Identical Functionality with Current Applications (Cont.)

Functional Area	Self-Service UI Functionality	How to Achieve with Current Applications
Order Management functionality	The Self Service Administration UI featured the ability to view order details, cancel orders, and preview invoices.	In Oracle iStore Release 11.5.9 (IBE.O), both B2B and B2C users can cancel orders. In addition, by using Oracle Order Management, users can cancel iStore orders and view iStore order details. Order Management provides much greater functionality to manage orders placed from iStore. For information on Oracle iStore's order cancellation functionality, see Section 11.6, "Order Cancellation", in this guide. Also refer to <i>Oracle Order Management Suite Implementation Manual, Volume 1 and Volume 2</i>. By using Oracle Accounts Receivables, one can edit invoices generated from iStore orders. For more information, please refer to the <i>Oracle Receivables User's Guide, Release 11i</i>, Financials Family Pack C, August 2002.

Table G–1 Achieving Identical Functionality with Current Applications (Cont.)

Functional Area	Self-Service UI Functionality	How to Achieve with Current Applications
Catalog import / export	The Self Service Administration UI featured the ability to import and export the catalog, but with limitations, such as support of only one store and limited support of content component functionality.	Oracle Inventory and Oracle Order Management provide open interfaces and APIs which allow the import of data into the Oracle E-Business Suite. Price List APIs: Please refer to the <i>Order Management Suite APIs and Open Interfaces Manual</i>, Part No. A88868-03. Open Interface for Items: You can import and update items and their category assignments, from any source, into Oracle Inventory. For more information, please refer to the <i>Oracle Inventory User's Guide</i>, Part No. A83507-05, (Chapter 5 Item - Open Item Interface).
Storefront functionality	The Self Service Administration UI featured the concept of storefront display, where presentation preferences could be selected for each storefront. Different storefronts were provided out-of-the-box, and the user could apply a storefront to a store, in order to change the store presentation.	In Release 11.5.9 (IBE.O), the concept of "store" replaces Self Service Administration storefront. Not only does iStore support multiple stores, but also the presentation (page layout, catalog) can be different for each store. iStore display templates functionality allows the user to change how products and sections are displayed. Further customization can be done by using the template manager functionality. The same storefront functionality is provided in Release 11.5.9 (IBE.O), by using the iStore template manager and media object functionality. See Chapter 8, "Implementing Customer UI Display", Chapter 7, "Implementing Customer UI Catalog", and Appendix D, "Advanced Display", in this guide, for more information. By using standard iStore functionality, the menus, images, and style sheet also can be customized. For more information refer to Appendix D, "Advanced Display", and Appendix E, "Display Templates and Media Objects", in this guide.

Table G–1 *Achieving Identical Functionality with Current Applications (Cont.)*

Functional Area	Self-Service UI Functionality	How to Achieve with Current Applications
Storefront content: Bins	In the Self Service Administration UI, the user could edit bins, and enter directly the bin content.	The same functionality can be provided by using the iStore template manager. By mapping different JSP or HTML files by bin and by store and language, users can define the content being displayed in each bin. For more information refer to Appendix D, "Advanced Display", and Appendix E, "Display Templates and Media Objects", in this guide.

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