

# **Oracle® iStore**

Quick Reference Guide

Release 11*i*

**Part No. B10582-01**

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This document provides summarized overviews and quick steps for Oracle iStore, Release 11*i* (11.5.9).

Oracle iStore Quick Reference Guide, Release 11i

Part No. B10582-01

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# Send Us Your Comments

## **Oracle iStore Quick Reference Guide, Release 11i**

### **Part No. B10582-01**

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:

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



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# Preface

## Audience for This Guide

Welcome to Release 11i of *Oracle iStore Quick Reference 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*.

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

## How to Use this Guide

This guide contains the information to help you get started understanding and using Oracle iStore.

- [Chapter 1, "Introduction to Oracle iStore 11i"](#), provides an overview of Oracle iStore features and concepts.
- [Chapter 2, "Store Administration User Interface"](#), describes the main features and functionality of Oracle iStore's administration user interface.

- [Chapter 3, "Customer User Interface"](#), explains the highlights of the customer-facing application.
- [Chapter 4, "Store Administration Quick Steps"](#), contains quick steps for common Store Administration UI procedures.

## Typographic Conventions

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

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

## Documentation Accessibility

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

### Accessibility of Code Examples in Documentation

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

## 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 Implementation and Administration Guide**

This guide has the information needed to implement and administer/maintain Oracle iStore.

### **Oracle iStore API Reference Guide**

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

### **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 Quoting Implementation and User Guides**

For information related to Oracle Quoting, see the *Oracle Quoting Implementation Guide* and the *Oracle Quoting User Guide*.

### **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 Order Management User's Guide**

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

### **Oracle Advanced Pricing User's Guide**

This guide provides information on setting up Oracle Advanced Pricing.

### **Oracle Shipping Execution User's Guide**

This guide explains the setup of shipping parameters in Oracle Shipping Execution.

### **Oracle8i interMedia Text Reference**

This guide explains how to set up synonym files in Oracle8i interMedia.

### **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 11i. 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 11i, 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 Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

## **Upgrading Oracle Applications**

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

## **Maintaining Oracle Applications**

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

## **Oracle Applications System Administrator's Guide**

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

## **Other Implementation Documentation**

### **Oracle Workflow Guide**

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

### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle iStore 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.



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# Introduction to Oracle iStore 11i

This chapter provides an introduction to Oracle iStore 11i, and discusses its relationships with other Oracle applications.

For implementation information, see the *Oracle iStore Implementation and Administration Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Topics in this chapter include:

- [Oracle iStore 11i Overview](#)
- [Oracle iStore Overview and Key Features](#)
- [Mandatory Integrations with Other Oracle Applications](#)
- [Optional Integrations with Other Oracle Applications](#)

## 1.1 Oracle iStore 11i Overview

Fully integrated with the Oracle E-Business Suite, Oracle iStore 11i is a powerful tool that allows businesses to create and manage online stores. A highly configurable Java application, Oracle iStore employs Oracle foundation and back-end applications along with its own comprehensive Java and PL/SQL programming and logic to deliver a high-end application that responds to the growing need for online commerce in both business-to-business (B2B) and business-to-consumer (B2C) electronic scenarios.

Oracle iStore lets businesses create, manage, and personalize powerful Internet storefronts in a secure and scalable environment.

Oracle iStore contains two user interfaces:

- **The Store Administration UI:**

The Store Administration UI allows store administrators to create and maintain multiple stores, catalogs, and related business rules, as well as access business and operational reports.

Store Administration features and functionality are covered in Chapter 2, Store Administration User Interface.

■ **The Customer UI:**

This is the customer-facing application which features shopping carts and lists, cart sharing, a full range of order taking capabilities, e-mail notifications of user events, quote retrieval, marketing, guided selling, and more.

The Customer UI features and functionality are covered in Chapter 3, Customer User Interface.

Together, the Store Administration and Customer user interfaces provide a compelling e-commerce package.

Integration with other Oracle applications provides support and additional functionality, including:

- Oracle Forms and HTML technology stack
- Inventory management
- Order processing
- Credit card authorization
- Human resources
- Reporting
- Marketing
- Financials and procurement

Many of these possible integrations are discussed in [Section 1.3, "Mandatory Integrations with Other Oracle Applications"](#), and [Section 1.4, "Optional Integrations with Other Oracle Applications"](#).

The next section, [Section 1.2, "Oracle iStore Overview and Key Features"](#), discusses the main advantages of using Oracle iStore to create and manage stores on the World Wide Web.

## 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

## 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.

## 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.

### 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

### 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.

## 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

## 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.
- Customer Profile 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.

## 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.

## 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

### **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

### **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.

- 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.
- Ability to create deep link advertisements to the iStore Customer UI in other web pages.

## 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 Mandatory Integrations with Other Oracle Applications

The following Oracle applications provide are mandatory integrations for Oracle iStore:

- **The Oracle Technology Stack** provides the fundamental technology stack for Oracle Application Object Library, Oracle Forms and Oracle E-Business Suite

applications. The modules within the technology stack allow user creation and maintenance, application setups, and ways to customize the applications.

- **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.
- **Oracle General Ledger (GL)** provides business unit information to Oracle iStore. In it, you can define your accounting structure, business calendars, define and enable currencies, and manage your business units.
- **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.
- **Oracle Inventory** serves as the repository of products that can be sold through Oracle iStore.
- **The Oracle Order Management** suite of applications processes, records, and tracks customer orders and shipping details; allows you to set up basic pricing; allows setup of payment and shipping options; and can facilitate returned orders. Oracle Order Management integrates with Oracle iStore via Oracle Order Capture APIs and schema.

For more information, see the Before You Begin chapter of the *Oracle iStore Implementation and Administration Guide*, and the respective product documentation.

## 1.4 Optional Integrations with Other Oracle Applications

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

- **Oracle Advanced Pricing** --- Use Oracle Advanced Pricing to set up customer discounts, sourcing rules, pricing qualifiers, and pricing modifiers.
- **Oracle Advanced Supply Chain** --- Use Oracle Advanced Supply Chain (Global ATP Server) to provide product availability information.
- **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.
- **Oracle Call Center Technology** --- Use the Oracle Call Center Technology (CCT) suite of applications to process call-me-back requests.

- **Oracle Configurator** --- Use Oracle Configurator to enable customer configured products, provide guided selling, and perform some of the shopping cart validations.
- **Oracle Content Management** --- 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.
- **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.
- **Oracle iPayment** --- Oracle iPayment's integration with Oracle iStore can be used to provide online credit card authorization and a variety of other services.
- **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.
- **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.
- **Oracle Marketing** --- Use Oracle Marketing to define, execute, and manage marketing campaigns, budgets, and segments across all channels, and to define promotions and discounts. You also can use Oracle Marketing to allow the creation and management of Oracle Inventory products.
- **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.
- **Oracle Sales Applications** --- Use Oracle Sales Online and Oracle TeleSales to import sales leads from Oracle iStore orders and expired shopping carts.
- **Oracle Sales Contracts** --- Use Oracle Sales Contracts for complete contract management and service agreements.
- **Oracle Workflow** --- Use Oracle Workflow to send e-mail notifications and confirmations to customers and sales representatives.

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

For more information, see the *Oracle iStore Implementation and Administration Guide* and the respective product documentation.



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# Store Administration User Interface

In the Store Administration UI, iStore administrators create and maintain stores and their catalogs and content, and access store reports.

For complete Oracle iStore 11i implementation and usage information, see the *Oracle iStore Implementation and Administration Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Main topics in this chapter include:

- [Stores Overview](#)
- [Customer UI Display](#)
- [Content Management](#)
- [Catalog Management](#)
- [Business and Operational Reports](#)
- [E-Mail Notifications](#)
- [Background Data Management](#)

## 2.1 Stores Overview

The Store Administration UI is a complete store-building application which enables you to create and maintain any number of Internet stores which you then publish to customers in the web application known as the Customer UI.

You can create as many stores as you wish, all within a single instance, and targeted, if desired, at different user communities. Both business-to-business (B2B) and business-to-consumer (B2C) stores can be created.

For complete information, see the *Oracle iStore Implementation and Administration Guide*. Store quick steps can be found in [Section 4.1, "Store Creation Quick Steps"](#).

This topic's subsections include:

- [Section 2.1.1, "Main Features of Stores"](#)
- [Section 2.1.2, "Oracle iStore Administrator"](#)
- [Section 2.1.3, "Preview Mode"](#)

## 2.1.1 Main Features of Stores

The easy-to-use Store Administration UI is a complete store creation and maintenance application. Main features include:

- **Store Naming** --- You decide both the internal names and the display names of your Internet stores. In the Customer UI store selection page, the display names are presented for customer selection. Each display name corresponds to an Oracle iStore customer responsibility, which is in turn mapped to a default operating unit. Oracle iStore can either automatically alphabetize this display list, or you can set the display order yourself.
- **Store Duplication** --- At any time, you can select a store and copy it. Duplicating a store means all associated parameters, catalog, and content also are available to the copied store.
- **Store Languages** --- Each store can have any number of installed languages associated with it. The languages then are presented in the Customer UI as a hyperlink next to the store name. Users simply select the appropriate language to enter the store in the language of their choice.
- **Store Currencies and Price Lists** --- Any number of installed currencies and implemented price lists can be associated with a store, allowing you to sell your products in any country, and to provide product prices to different user segments.
- **Shipping Methods** --- Each store can have its own shipping methods set up in the back-end Oracle Inventory application.
- **Payment Types** --- You can provide any type of payment option to your customers, which can then be processed in the back-end Oracle Order Management and Oracle Financials applications. Each store can have its own set of payment types. You can also provide automatic online authorization of credit cards in your online stores.

- **Payment Thresholds** --- The payment threshold feature allows you to set order amount thresholds for specific payment types. With this feature, orders over a certain amount offer specific payment type choices for the customer.
- **Order Amount Thresholds** --- The order amount threshold feature allows you to set a maximum orderable amount for a store and currency combination. With this feature, any shopping cart totaling a set monetary amount cannot be ordered.
- **User Security** --- Oracle iStore contains security rules which tie each store uniquely to one or more customer responsibilities. You can decide whether to allow guest user access, or to restrict browsing only to registered users.
- **Access Restrictions** --- You can set up access restrictions by organization; this allows you to restrict access to only users from a certain organization or organizations, or you can restrict users from certain organizations from accessing your stores.
- **Check Product Availability** --- For each store, you can provide customers with the ability to check product availability during the checkout phase.
- **Customer Data Capture** --- Oracle iStore's Lead Import functionality allows you to capture and re-use information from expired shopping carts and orders, and to potentially use them in Oracle Sales applications. Integration with Oracle Marketing's Event Capture means you can also capture some of the customers' browsing habits in your stores.
- **Global eCommerce Support** --- Oracle iStore supports a global product catalog and infrastructure, allowing you to launch and maintain an international online presence.

The iStore administrator uses the **Stores** menu in the Store Administration UI to perform store creation and maintenance tasks. The figure below shows the **Stores** page.

Figure 2–1 Stores Page

**Stores**

This page displays the list of stores. You can create a new one by clicking the Create Store button or you can update an existing one by clicking the buttons on the table.

**Search**

Search

**Results**

Select a Store and ...

Previous 1-10 of 60 Next 10

Select	Name	Code	Last Updated Date	Updated By	Start Date	End Date
<input checked="" type="radio"/>	A Div ibe.0 store jan06	A Div ibe.0 store jan06	28-JAN-2003	IBE_ADMIN istore admin user	06-JAN-2003	
<input type="radio"/>	A Div store netscape 7.0	A Div store netscape 7.0	20-NOV-2002	IBE_ADMIN istore admin user	20-NOV-2002	28-NOV-2002
<input type="radio"/>	A Store for German	A Store for German	10-FEB-2003	IBE_ADMIN istore admin user	16-JAN-2003	22-JAN-2004
<input type="radio"/>	A Wendy Store created in G		05-FEB-2003	IBE_ADMIN istore admin user	05-FEB-2003	
<input type="radio"/>	A divfeb06store	A divfeb06store	06-FEB-2003	IBE_ADMIN istore admin user	06-FEB-2003	05-MAY-2004
<input type="radio"/>	A_JAn_23_store	A JAn 23 store	05-FEB-2003	IBE_ADMIN istore admin user	16-JAN-2003	30-JAN-2004
<input type="radio"/>	Book Store		17-FEB-2003	IBE_ADMIN istore admin user	17-FEB-2003	
<input type="radio"/>	Bulent's store		12-MAR-2003	IBE_ADMIN istore admin user	05-FEB-2003	
<input type="radio"/>	Cingular Wireless	Cingular Wireless	02-JAN-2002	IBE_ADMIN istore admin user	02-JAN-2002	
<input type="radio"/>	Copy	Copy	30-JAN-2003	IBE_ADMIN istore admin user	03-SEP-2002	31-OCT-2007

Previous 1-10 of 60 Next 10

Select a Store and ...

## 2.1.2 Oracle iStore Administrator

The Oracle iStore administrator is the user you set up to create and manage the stores in the Store Administration UI. During setup, you create this user using the supplied iStore Administrator responsibility. The Store Administrator also has access to the notification messages and other advanced features, the catalog, products listings, and the content management features of the stores.

## 2.1.3 Preview Mode

Simply by selecting the **Preview** button in the UI, store administrators can see how the stores will look to customers in the Customer UI. In Preview mode, all stores -- regardless of Published or Unpublished status -- can be previewed.

See "Using Preview Mode" in the Verifying the Implementation chapter of the *Oracle iStore Implementation and Administration Guide* for complete details.

## 2.2 Customer UI 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.

For complete information, see the Implementing Customer UI Display chapter of the *Oracle iStore Implementation and Administration Guide*. Content and display quick steps can be found in [Section 4.4, "Content and Display Templates Quick Steps"](#).

This section's main subsections include:

- [Section 2.2.1, "Display Templates"](#)
- [Section 2.2.2, "Section and Product Template Gallery"](#)
- [Section 2.2.3, "Images, Messages, and HTML Content"](#)

For more information on Customer UI features and functionality, see [Chapter 3, "Customer User Interface"](#).

### 2.2.1 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. For example, some templates display the shopping cart pages, some display the catalog pages, and other templates display the order tracking pages. Each template used in the online stores link to a JSP which provides the actual display content. By mapping your own JSPs to the seeded templates, you can provide your own customized content in the stores.

For complete information, see the Implementing Customer UI Display chapter and the Advanced Display appendix of the *Oracle iStore Implementation and Administration Guide*.

The figure below shows the **Templates** maintenance page within the Store Administration UI.

**Figure 2–2 Templates Page**

**Templates**

Search

Search

**Results**

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Name	Programmatic Access Name	Keywords	Description	Applicable To	Update	Delete
B2B Share cart processing	STORE_CART_SHARE_B2B_P		B2B Share cart processing page	Others		
B2B Shipment Process Page	STORE_CHKOUT_B2B_SHIP_HEADER_P		B2B Shipment Process Page	Others		
B2C Bill Payment Display Page	STORE_CHKOUT_B2C_INVOICE_HEADER		B2C Bill Payment Display Page	Others		
B2C Header Shipment Display Page	STORE_CHKOUT_B2C_SHIP_HEADER		B2C Header Shipment Display Page	Others		
B2C Share cart display	STORE_CART_SHARE_B2C		B2C Share cart display page	Others		
B2C Share cart processing	STORE_CART_SHARE_B2C_P		B2C Share cart processing page	Others		
Bin Left 1	STORE_CTLG_BIN_LEFT_1		Bin Left 1	Others		
Bin Left 2	STORE_CTLG_BIN_LEFT_2		Bin Left 2	Others		
Bin Left 3	STORE_CTLG_BIN_LEFT_3		Bin Left 3	Others		
Bin Left 4	STORE_CTLG_BIN_LEFT_4		Bin Left 4	Others		

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## 2.2.2 Section and Product Template Gallery

Using sections and their products organized into a hierarchal structure, your product catalog is presented through a powerful section and product catalog building tool. Display Templates for sections and products are presented in the Store Administration application in WYSIWYG fashion, allowing you to easily select the how your sections and products actually display to customers.

See [Section 2.4, "Catalog Management"](#), below, for more information. See [Chapter 4, "Store Administration Quick Steps"](#), for task-oriented steps.

## 2.2.3 Images, Messages, and HTML Content

Oracle iStore features flexible and reusable content tools. To present product images and html content in your specialty stores, you map seeded content components to seeded or new media objects, which are in turn linked to the content files (e.g., .gif, .html) which you supply.

To present messages, you utilize hundreds of seeded text messages, some of which are also reusable media objects. See the *Implementing Customer UI Display* chapter of the *Oracle iStore Implementation and Administration Guide*, for details. The seeded Customer UI text messages can be altered. See the *Implementing Messages and Implementing and Implementing Customer UI Display* chapters of the *Oracle iStore Implementation and Administration Guide*, for details.

Integration with Oracle Content Manager can provide tools to create content items and use content versioning, approvals, and a translation interface from within the Store Administration UI. This integration is described in the *Integrating Oracle iStore with Oracle Content Manager* chapter of the *Oracle iStore Implementation and Administration Guide*.

## 2.3 Content Management

Oracle iStore comes with an extensive content management system which features reusable content placeholders known as content components and logical media objects which map to source files. The seeded Display Templates contain programmatic access names used to call the seeded content components and media objects. Using content components and media objects, you can provide a wide variety of reusable content in the Internet stores.

For complete information, see the *Implementing Customer UI Display* chapter of the *Oracle iStore Implementation and Administration Guide*. For content-related quick steps, see [Section 4.4, "Content and Display Templates Quick Steps"](#).

This section's main subsections include:

- [Section 2.3.1, "Content Repository"](#)
- [Section 2.3.2, "Content Components and Media Objects"](#)
- [Section 2.3.3, "Optional Integration with Oracle Content Manager"](#)

### 2.3.1 Content Repository

The Content Repository allows you to view and upload the source files for use in your store pages. 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.

For task-oriented quick steps, see [Section 4.4.3, "Uploading Source Files to Content Repository"](#).

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 page.

**Figure 2–3 Content Repository Page**

The screenshot shows the 'Content Repository' page in the Vision Enterprises iStore. At the top, there is a navigation bar with tabs for 'Stores', 'Catalog', 'Content', 'Reports', and 'Advanced'. Below this, there is a search section with a search bar and a 'Go' button. The 'Results' section displays a table of source files. The table has columns for 'Source File Name', 'Keywords', 'Description', 'Preview', 'Update', and 'Delete'. The first row shows a file named '1pixel.gif' with a description of '1pixel'. Other files include '8310\_index\_p7.jpg', '8810\_1.jpg', '8810\_3.jpg', 'Envoy Deluxe Bundle.jpg', and 'Inkjet Printer' related files. Each row has a preview icon, an update icon (pencil), and a delete icon (trash can). There is also an 'Upload Source File' button and a pagination control showing '1-10 of 154' items.

Source File Name	Keywords	Description	Preview	Update	Delete
1pixel.gif		1pixel			
8310_index_p7.jpg	Nokia 8310				
8810_1.jpg	mobile				
8810_3.jpg	mobile				
Envoy Deluxe Bundle.jpg	envoy deluxe bundle small				
Inkjet Printer detail.htm	Inkjet printer detail				
Inkjet Printer_french.htm					
Inkjet Printer_french.htm					

## 2.3.2 Content Components and Media Objects

Oracle iStore’s content components and media objects are reusable content placeholders in the seeded JSPs that allow you to define content for the Customer UI beyond that provided by section or product description information. This content can be image or html files that you associate with a section or product in order to provide your customers with additional information. It also can be text messages used to prompt or guide the user.

For task-oriented quick steps, see [Section 4.4.1, "Creating Media Objects"](#), and [Section 4.4.2, "Assigning Content Items to Media Objects"](#).

For complete information, see the Implementing Customer UI Display chapter of the *Oracle iStore Implementation and Administration Guide*.

The figures below show the **Media Objects** and **Content Components** pages.

**Figure 2–4 Media Objects Page**

The screenshot shows the Oracle iStore Media Objects page. The page header includes the Vision Enterprises iStore logo and navigation links for Stores, Catalog, Content, Reports, and Advanced. The main content area features a search bar, a 'Create Media Object' button, and a table listing various media objects with columns for Name, Programmatic Access Name, Keywords, Description, Class, Update, and Delete.

Name	Programmatic Access Name	Keywords	Description	Class	Update	Delete
Accessories Section	Accessories_Section	Accessories Section	Accessories Section	Section		
Bin Close Image	STORE_BIN_CLOSE_IMAGE		Bin Close Image	Others		
Bin Open Image	STORE_BIN_OPEN_IMAGE		Bin Open Image	Others		
Catalogue Item Dropdown Image	STORE_CTLG_ITEM_DROP_DOWN_IMAGE		Catalogue Item Dropdown Image	Product		
Catalogue Section Link image	STORE_CTLG_SCT_LINK_IMAGE		Catalogue Section Link image	Section		
Comms 10pt Horizontal Spacer	COMMS_10PT_HORIZONTAL_SPACER			Product		
Comms 10pt Vertical Spacer	COMMS_10PT_VERTICAL_SPACER			Product		
Comms Cable Internet 1	COMMS_PRD_CABLE_INTERNET_1			Product		

Figure 2-5 Content Components Page

The screenshot shows the 'Content Components' page in the Vision Enterprises iStore. The page has a blue header with the 'Vision Enterprises iStore' logo and navigation tabs for 'Stores', 'Catalog', 'Content', 'Reports', and 'Advanced'. Below the header is a search bar with a 'Go' button and a 'Create Content Component' button. A table lists the content components, with columns for Name, Class, Programmatic Access Name, Description, Update, and Delete. The table contains five rows of data.

Name	Class	Programmatic Access Name	Description	Update	Delete
Product Additional Information	Product	STORE_PRODUCT_ADDTL_INFO	Catalog - Product Additional Information		
Product Large Image	Product	STORE_PRODUCT_LARGE_IMAGE	Catalog - Product Large Image		
Product Small Image	Product	STORE_PRODUCT_SMALL_IMAGE	Catalog - Product Small Image		
Section Additional Information	Section	STORE_SECTION_ADDTL_INFO	Catalog - Section Additional Information		
Section Small image	Section	STORE_SECTION_SMALL_IMAGE	Catalog - Section Small Image		

### 2.3.3 Optional Integration with Oracle Content Manager

Integration with Oracle Content Manager (OCM) can provide even more content management functionality, including:

- Content creation
- Content versioning
- Content approval system and related workflows
- Content translation capabilities
- Association of content items to Oracle iStore store products, sections, and media objects.

Oracle Content Manager 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.

Oracle Content Manager gives users a system with the essential tools required to create and manage any type of content, in the way that best suits their business

needs. This powerful tool enables companies to produce consistent content that can be shared across internal and external customers.

Following the integration of Oracle Content Manager, the subtabs within the Store Administration UI's Content tab change to those provided by the integration.

For complete information, see the Integrating Oracle iStore with Oracle Content Manager chapter of the *Oracle iStore Implementation and Administration Guide*.

The figure below shows the Content Management Integration UI.

**Figure 2–6 Content Management Integration UI**

The screenshot displays the Oracle iStore interface for Content Management. At the top, there are navigation tabs for 'Stores', 'Catalog', 'Content', 'Reports', and 'Advanced'. Below these, a sub-tabbed menu includes 'Usage Summary', 'Media Objects', 'My Content', 'Library', 'Pending Approvals', 'Translations', and 'Trash'. The main heading is 'Usage Summary: Content Usage by Stores'. A search section includes a search box with a dropdown menu set to 'Content Name', an 'Expiration Date Range' field with the value '03-MAR-2003', and buttons for 'Go', 'Clear', and 'Advanced Search'. Below the search area, a 'Results' section features a table with the following data:

Select	Content Item	Content Type	Live Version	Available Date	Expiration Date	Usage	Replace	Latest Version
<input type="checkbox"/>	QA_MEDIA/acsec.gif	Image	1					<input checked="" type="checkbox"/>
<input type="checkbox"/>	QA_MEDIA/comms_10pt_horizontal_spacer.gif	Image	1					<input checked="" type="checkbox"/>
<input type="checkbox"/>	QA_MEDIA/comms_10pt_horizontal_spacer.gif	Image	1					<input checked="" type="checkbox"/>
<input type="checkbox"/>	QA_MEDIA/comms_10pt_horizontal_spacer.gif	Image	1					<input checked="" type="checkbox"/>
<input type="checkbox"/>	QA_MEDIA/comms_10pt_horizontal_spacer.gif	Image	1					<input checked="" type="checkbox"/>
<input type="checkbox"/>	QA_MEDIA/comms_10pt_horizontal_spacer.gif	Image	1					<input checked="" type="checkbox"/>

## 2.4 Catalog Management

Oracle iStore also contains a complete catalog management system that allows you to present your products from Inventory in a hierarchal fashion that in part determines the browsing experience in the Customer UI.

For complete information, see the Implementing Customer UI Catalog chapter of the *Oracle iStore Implementation and Administration Guide*. For task-oriented quick steps, see [Section 4.2, "Sections Quick Steps"](#), and [Section 4.3, "Products Quick Steps"](#).

Topics in this section include:

- [Section 2.4.1, "Section Hierarchy"](#)
- [Section 2.4.2, "Product Catalog"](#)

## 2.4.1 Section Hierarchy

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.

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 and manage sections
- Duplicate existing sections, including all products and content
- Set Display Templates at the section level -- Display Templates determine the layout of the page which displays the section in the Customer UI
- 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
- Use the search utility to search for sections

The majority of section creation and maintenance tasks are performed using the **Sections** pages accessible within the **Catalog** tab in the Store Administration UI. The figure below shows the main Sections page.

Figure 2–7 Catalog Sections Page

**Catalog Hierarchy**

**Search**

Search

**Hierarchy**

To isolate the display to a section, click on the "Focus" icon next to the section.

**Select a Section and ...**

[Expand All](#) | [Collapse All](#)

⊕ Root

Select Focus	Section	Type	Status	Start Date	Sections	Products
⊖	▼ Root	Navigational	PUBLISHED	02-MAY-2000		
⊕	▶ UK Vision Computers	Navigational	PUBLISHED	14-JUN-2002		
⊕	▶ Vision Computers	Navigational	PUBLISHED	24-JUL-2001		
⊕	▶ Vision Computers Indirect	Navigational	PUBLISHED	24-JUL-2001		

## 2.4.2 Product Catalog

In a typical implementation, Oracle Inventory is the repository of all products sold through the Oracle iStore Customer UI. In the Store Administration UI, store administrators can view and perform limited maintenance on products, assign products to store sections, associate content with products, and determine how the products display.

Oracle iStore ships with the capability to maintain a flexible product catalog, utilizing Oracle Inventory on the ERP side. As a part of maintaining the items (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 Publish Inventory flag, which is identical functionally to the Published/Unpublished iStore flag
- Assign price lists that contain the products to stores

- Search for products
- Use the Product Autoplacement concurrent program to automatically populate and replace products in specified sections
- Set Display Templates at the product level -- Display Templates determine the layout of the page which displays the product in the Customer UI

Optional integration with other Oracle applications can provide additional product functionality, including:

- **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
- **Oracle Bills of Material** to set up configurable items, model bundles, and items with standard warranties for sale in your stores.
- **Oracle Configurator** to enable --- in the Oracle iStore Customer UI --- customer-configured products, guided selling, solution-based modeling, and limited shopping cart validations.
- **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.

The majority of product maintenance tasks are performed using the **Products** pages accessible within the **Catalog** tab in the Store Administration UI. The figure below shows the main Products page.

Figure 2–8 Products Page

**Products**

**Search**

Search

**TIP** Use correct segment separator to search by product number.

**Results**

Select a Product and ...

View    1-10 of 812

Select	Product Number	Product Name	Sections Assigned	Content Components	Creation Date	Published Products
<input checked="" type="radio"/>	280989	PJ1300 XGA Ultra High Projector	3	3	06-NOV-2002	<input checked="" type="checkbox"/>
<input type="radio"/>	75100001	PJ1065 XGA Projector	5	3	07-FEB-2002	<input checked="" type="checkbox"/>
<input type="radio"/>	75100002	PJ860 XP01 Projector	3	3	07-FEB-2002	<input checked="" type="checkbox"/>
<input type="radio"/>	75100003	PJ2380 XGA Projector	3	3	07-FEB-2002	<input checked="" type="checkbox"/>
<input type="radio"/>	75100004	PJ8990 X11 Projector	3	3	07-FEB-2002	<input checked="" type="checkbox"/>

## 2.5 Business and Operational Reports

The Store Administration UI features pre-defined business and operational reports that capture and present valuable data about your stores and your customers.

Drawing on Oracle Discoverer 4i and Oracle iStore Dashboard reports and bins, the reports are presented within the **Reports** menu. Integration with Oracle Workflow allows you to configure e-mail notification of two of the business reports.

Note that orders must be in Booked state before they appear in Oracle iStore reports.

For complete information, see the Implementing Reports chapter of the *Oracle iStore Implementation and Administration Guide*. For task-oriented quick steps, see [Section 4.5, "Reports Quick Steps"](#).

Topics in this section include:

- [Section 2.5.1, "Reports Dashboard"](#)

- [Section 2.5.2, "Business Reports"](#)
- [Section 2.5.3, "Operational Reports"](#)
- [Section 2.5.4, "E-Mail Reports"](#)

## 2.5.1 Reports Dashboard

The Oracle iStore Reports Dashboard pages within the Store Administration UI provide store administrators easy access to daily views of:

- Top Orders report
- Top Customers report
- Top Products report

The page also displays three bins:

- Store Order Summary
- Unpublished Sections
- Unpublished Products

For additional information about these reports and bins, see [Section 2.5.2, "Business Reports"](#), and [Section 2.5.3, "Operational Reports"](#), below.

For complete information, see the Implementing Reports chapter of the *Oracle iStore Implementation and Administration Guide*.

The figure below shows an example of the **Reports Dashboard** page.

Figure 2–9 Reports Dashboard Page

**Vision Enterprises iStore**

Stores Catalog Content Reports Advanced

Dashboard Email Reports Discoverer Reports

Welcome IBE\_ADMIN Mon Mar 03 14:34:26 PST 2003

**Store Order Summary** [Edit](#)

For	Orders	Sales
Day	53	271,337
Week	60	285,008
Month	60	285,008
Quarter	71	305,558
Year	189	512,766

Amount is in USD and scaled as: No Decimal  
Last refreshed on 15-NOV-2002 09:27:56

**Daily report: Top Orders** [Fri Nov 15](#)  
This report displays Top Orders by sales amount.

Order Number	Customer	Amount (USD)
<a href="#">10587</a>	Chuck Adams	161,258
<a href="#">10583</a>	Chuck Adams	10,482
<a href="#">10586</a>	Tom Jones	5,982
<a href="#">10589</a>	Chuck Adams	5,228
<a href="#">10577</a>	Tom Jones	4,644
<a href="#">10572</a>	Tom Jones	4,534
<a href="#">10568</a>	Mike Davis	3,959
<a href="#">27</a>	Teresa Mark	3,630
<a href="#">60</a>	Tom Jones	3,597
<a href="#">10563</a>	Teresa Mark	3,390

Amount is scaled as: No Decimal

**Unpublished Products** [Edit](#)

Product Name	Creation Date	Assigned Sections
No records found matching the given criteria		

**Daily report: Top Customers** [Fri Nov 15](#)  
This report displays Top Customers by sales amount.

Customer	Orders	Amount (USD)
<a href="#">Chuck Adams</a>	8	186,273
<a href="#">Tom Jones</a>	14	27,326
<a href="#">Mike Davis</a>	11	20,805
<a href="#">Chris Amith</a>	10	19,248
<a href="#">Teresa Mark</a>	10	17,686

Amount is scaled as: No Decimal

**Unpublished Sections** [Edit](#)

Section Name	Creation Date	Featured
<a href="#">Sale</a>	15-JAN-2003	No

**Daily report: Top Products** [Fri Nov 15](#)  
This report displays Top Products by sales amount.

Product	Order Lines	Amount (USD)
---------	-------------	--------------

## 2.5.2 Business Reports

The business reports and bins include:

- Top Product Sales Report** --- Displays the most frequently ordered products and their sales amounts for selected time periods; ranks products by sales amount and number of times ordered. This report is available as both Discoverer and iStore Dashboard reports.
- Customer Sales Report (Top Customers)** --- Identifies customers in terms of total order sales figures, and allows reporting of Customer Class data. The iStore Dashboard reports version of this report is called Top Customers, and it allows drill-down into customers' details. The Discoverer reports version

features statistical percentages that indicate the performance of a particular customer or Customer Class against that of all customers.

- **Top N Orders Report** --- This report summarizes top orders by operating unit and includes customer name, sales amount, and order numbers. It is available as Discoverer and Dashboard reports, as well as in e-mail version, Top 10 Orders.
- **Store Order Summary Report** --- This report summarizes the number of orders and total sales figures of all orders across all operating units and specialty stores. It is available as a Dashboard bin and in e-mail version as Historical Order Report.
- **Sales by Agreement Report** --- This Discoverer-only report provides numbers of orders made through pricing agreements -- including: agreement names, customer names, percentages of total orders and sales, sales amounts and average sales amounts.
- **Shopping Cart Conversion Report** --- This Discoverer-only 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. Sorting is available on: product names, number of times placed in cart, and number of times ordered.
- **Sales by End User Type Report** --- This Discoverer-only report allows you to view order information for specific or all operating units, and to sort that information by end user type (person or organization), number of orders, and sales amounts. Figures are included for percentage of total organization/person orders versus all orders.

The figure below shows an example of the Business Reports page, which leverages Oracle Discoverer integration.

Figure 2–10 Business Reports Page

The data collection period is from 01-JAN-2002 (Effective Begin Date) to 15-NOV-2002 (Effective End Date). Begin Date and End Date parameters for each report should be within the data collection period and in the format of 'DD-MON-RRRR'.

Report	Description
<a href="#">Customer Sales Report</a>	Displays number of orders and total sales amount for each customer
<a href="#">Sales by Agreement Report</a>	Displays number of orders and total sales amount for each pricing agreement
<a href="#">Sales By End User Type Report</a>	Displays number of orders and total sales amount by user type and operating unit
<a href="#">Top N Orders Report</a>	Displays sales amount for top orders
<a href="#">Top Product Sales Report</a>	Displays top products ranked by number of times ordered or by sales amount
<a href="#">Shopping Cart Conversion Report</a>	Displays conversion ratio for top ordered products and top placed in cart products.

## 2.5.3 Operational Reports

Oracle iStore's operational reports present data about the status and usage of products and sections in your stores.

### Product Reports and Bins

For all product reports, the Inventory Organization is a parameter, as defined by the profile option, **IBE: Item Validation Organization**. Also, the product reports make no distinction for items based on their **Orderable on the Web** status.

Product exception reports and bins include:

- **Unassigned Products Report** --- This Discoverer-only report lists products not assigned to any section and created within a defined time period. Both Published and Unpublished products are reported.
- **Assigned Products Report** --- This Discoverer-only report lists products assigned to at least one section. Both Published and Unpublished products are reported.
- **Products by Store Report** --- This Discoverer-only report displays products assigned to at least one section, reported by store.
- **Products Excluded by Store Report** --- This Discoverer-only report lists products explicitly excluded from one or many store(s).

- **Unpublished Products Bin** --- This bin lists Unpublished products created within a specific number of days from current date. The number of days is specified by setting bin preferences. For quick steps, see [Section 4.5.2, "Setting Bin Preferences"](#).

Examples of typical input criteria (which allow wildcard usage) for these product exception reports are: inventory organization, product creation dates, product number, product name, product published status, and category code and description.

Examples of sorting criteria for the output of these reports include: product name, inventory categories, stores, product creation dates, and published status.

## Section Reports and Bins

Section exception reports and bins include:

- **Sections With Store Assignment Report** --- This Discoverer-only report lists sections assigned to at least one store, and the stores to which they are assigned. Users can filter sections by various criteria, such as the creation date range, section name, or section code.
- **Sections Without Store Assignment Report** --- This Discoverer-only report lists sections not assigned to any store. Users can filter sections by creation date range, section name, or section code.
- **Sections With Store Exclusion Report** --- This Discoverer-only report lists sections excluded from stores. In this report, only sections within the parent section of the selected store(s) are considered. Each store is mapped to a parent section in the catalog's section hierarchy. Users can filter sections by creation date range, section name, or section code.
- **Empty Sections Report** --- This Discoverer-only report lists sections with neither products nor sections published within them, across all stores. Users can filter sections by creation date range, section name, or section code.
- **Unpublished Sections Bin** --- This iStore Dashboard bin shows sections which have an Unpublished status, across all stores, created within a specific number of days from current date. The number of days is specified by setting bin preferences. For quick steps, see [Section 4.5.2, "Setting Bin Preferences"](#).

Typical input parameters for these section exclusion reports include: section creation/start date ranges, section name and code, and published status.

Examples of sorting criteria for the output of these reports include: section name, section path, creation date, and section code.

The figures below shows the Operational Reports page

**Figure 2–11 Operational Reports Page**

Report	Description
<a href="#">Catalog Product Exceptions</a>	Displays information about Unassigned Products, Assigned Products, Products by Store and Products with Store exclusion
<a href="#">Catalog Section Exceptions</a>	Displays information about Sections with Store assignment, without Store assignment, Sections with Store exclusion and Empty Sections

## 2.5.4 E-Mail Reports

Two of the business reports can be configured as e-mail notifications, delivered automatically to the in-boxes of users that you designate. The e-mail notifications are seeded Oracle iStore notification events. The reports are:

- **Historical Summary Report** --- This is the Store Order Summary bin sent via e-mail with the number of orders and total sales amount (in currency) of all orders for selected time periods.
- **Daily Top N Orders Report** --- This 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.

The figure below shows the **Email Reports** page in the Store Administration UI.

Figure 2–12 Email Reports Page

**Historical Summary Report**

**Enable**  **Daily Top N Orders Report**

When enabled, the Email report is sent to the user list defined below.

Enable Email Reports

**User List for selected report**

⊖ Previous 1-1 of 1 Next ⊕

User Name	Email Address	Language	Delete
bcinarka	bulent.cinarkaya@oracle.com	American English	<input type="button" value="Delete"/>

⊖ Previous 1-1 of 1 Next ⊕

## 2.6 E-Mail Notifications

Oracle iStore provides more than 20 different notification events in which there are predefined e-mail messages. 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.

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 the Integrating Oracle iStore with Oracle Workflow chapter of the *Oracle iStore Implementation and Administration Guide* for additional information.

The figure below shows the main **Notifications** page within the Store Administration UI.

**Figure 2–13 Notifications Page**

The screenshot displays the Oracle iStore Store Administration UI. The top navigation bar includes the Vision Enterprises iStore logo and a menu with options: Stores, Catalog, Content, Reports, and Advanced. Below the navigation bar, the 'Notifications' section is active, showing a breadcrumb trail: Notifications > Template Manager > Content Components > Categories. The main heading is 'Notification Events' with the subtext 'Add or configure notification events.' A button labeled 'Add Notification Events' is visible. Below this, there is a table of notification events. The table has a header row with 'Notification Event', 'Details', and 'Remove' columns. The table contains 10 rows of notification events, each with a 'Details' icon (document) and a 'Remove' icon (trash). The events listed are: Cancel Order, Change Access Level, Contract Negotiations Request - Approval, Contract Negotiations Request - Cancellation, Contract Negotiations Request - Disapproval, Contract Negotiations Request - To Sales Representatives, Contract Negotiations Request - To Users, End Working, Forget Login, and Order Confirmation - Next steps for faxed orders. Navigation controls for the table include 'Previous', '1-10 of 19', and 'Next 9' buttons.

Notification Event	Details	Remove
Cancel Order		
Change Access Level		
Contract Negotiations Request - Approval		
Contract Negotiations Request - Cancellation		
Contract Negotiations Request - Disapproval		
Contract Negotiations Request - To Sales Representatives		
Contract Negotiations Request - To Users		
End Working		
Forget Login		
Order Confirmation - Next steps for faxed orders		

## 2.7 Background Data Management

Several concurrent programs populate database tables with information required for data refresh, including:

- **Reporting** --- The reporting series of concurrent programs allows the historical order summary and top orders reports to be delivered via e-mail, and load reporting data into tables where it can be accessed by Oracle iStore Reports and Bins.
- **Customer UI Product Search** -- This series of concurrent programs populates search tables for the product search in the Customer UI.
- **Express Checkout** -- The express checkout concurrent program allows automatic submission of express checkout orders.
- **Lead Import** --- The lead import concurrent program sends customer data from Oracle iStore into tables that can be accessed by the Oracle Sales applications.
- **Product Autoplacement** --- This concurrent program automatically populates specific store sections with products from specific Inventory categories.

The supplied iStore Concurrent Programs responsibility allows you to set up a user and run these programs.

---

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## Customer User Interface

The Oracle iStore 11i Customer UI is a complete catalog presentation and order-facilitating application. It features shopping carts and lists, cart sharing, a range of order management abilities, e-mail notifications of user events and actions, quote retrieval, guided selling, and more.

For complete Oracle iStore 11i implementation and usage information, see the *Oracle iStore Implementation and Administration Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Main topics in this chapter include:

- [Specialty Stores](#)
- [Shopping Carts](#)
- [Orders](#)
- [Users and Registration](#)

### 3.1 Specialty Stores

After you build a store in the Store Administration UI and tie a customer responsibility to it, it becomes a *specialty store* in the Customer UI.

For more information, see the following sub-topics:

- [Section 3.1.1, "Specialty Stores Overview"](#)
- [Section 3.1.2, "Catalog Pages"](#)

### 3.1.1 Specialty Stores Overview

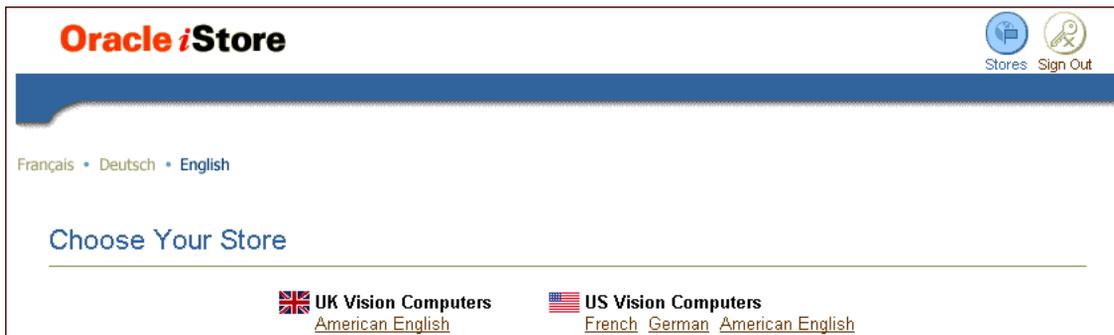
Specialty stores are presented on a single web page, the Specialty Stores Page, and customers select a specialty store name to retrieve a specialty store's catalog pages. From the top level page of a specialty store, customers can browse through sections and their associated products, and ultimately add items to their shopping carts for checkout/purchase.

Hundreds of Display Templates that link to JavaServer Pages™ present the Customer UI's product catalog and section hierarchy. The product catalog and section hierarchy are built in the Store Administration UI. Oracle iStore installs with a complete set of templates for the Customer UI pages and related process flows. The template structure of Oracle iStore's Customer UI allows you to map your own JSPs to the templates (using the Store Administration UI) in order to provide a unique web page presentation.

The default landing page for the Customer UI, the Specialty Stores Page, can be configured in either a multi-column or single-column layout. The multi-column layout helps facilitate a multi-language and/or multi-operating unit implementation of the stores.

The figure below shows an example of the **Specialty Stores Page** in a multi-column layout.

**Figure 3–1 Specialty Stores Page**



Specialty store names display in alphabetical order, unless manually ordered by the store administrator. In a multi-column layout of the Specialty Stores Page, hyperlinks automatically appear for each installed language. In a single-column implementation, a drop-list of available specialty stores is presented to the customer.

All of the graphical elements on the page can be changed using the Store Administration application's media object functionality. For example, the language names and flag images shown on the page are seeded graphics files that ship with Oracle iStore --- you can map any image you wish to these and other elements.

For more information, see the Implementing Customer UI Initial Pages chapter of the *Oracle iStore Implementation and Administration Guide*.

### 3.1.2 Catalog Pages

After you build the store sections and product catalog in the Store Administration UI, the catalog pages are available to customers in the Customer UI. The default landing page after customers select a specialty store is the Store Home Page.

Depending upon the configuration, the Store Home Page features:

- Product search functionality
- Tabs and subtabs derived from section names
- Section names and descriptions
- Product names and descriptions
- Product prices, including discounts
- Images at section or product level
- Add to Cart buttons
- Configure buttons for items set up through Oracle Configurator
- Support for bundle items set up through Oracle Bills of Material
- Navigational links for browsing, including a Browse bin that displays all specialty stores
- Several other bins, including a Welcome bin, global currency selection bin, and specialty store selector
- Store-level icons that link to account management menus, allowing self-service administration of customers' accounts -- including carts, orders, and customer profile
- Drill-down links to product details

See the *Oracle iStore Implementation and Administration Guide* for complete details.

The figure below shows an example of how the default Customer UI landing page, the Store Home Page, might look in an implementation of Oracle iStore.

Figure 3–2 Store Home Page

**Oracle iStore**  
Vision Computers

Stores Cart Orders Profile Sign In Help

Home Books Music Electronics Computers

Welcome How to order

Quick Search  All Products  [Advanced Search](#)

**Browse**

[Home](#)  
[Books](#)  
[Music](#)  
[Electronics](#)  
[Computers](#)

**Announcements**

[What's New on Vision Store](#)

[Offer your customers online, onsite and on-the-phone customer service with Vision](#)

[Get the latest Oracle technology, virtually anywhere, anytime with the Oracle Learning Network \(OLN\)](#)

**Hot Deals**

**Vision Pad DX - Mobile Computer**  
Wireless Internet and e-mail access at your convenience. Vision's most innovative handheld, the Vision Pad DX - Mobile Computer, brings the power of the Web to you in a slim, ever so handsome package.

**Retail Price:** \$249.99 Each  
**Your Price:** \$237.49 Each

**Sentinel Multimedia Laptop**  
Power to Burn Burn DVDs that is! With Mobile Intel® Pentium® 4 Processor-M processing power, amazing 16.1" high-resolution UXGA LCD screen, and new DVD-RW/CD-RW drive with exclusive Click to DVD™ software, the GRX600 Series notebooks continue to bridge the gap between notebook mobility and desktop functionality. &#149;

**Retail Price:** \$2,803.99 Each  
**Your Price:** \$2,663.79 Each

**Welcome**

**Guest**  
[Sign In](#)

[View Shopping Cart Total: \\$229.94](#)

[View Saved/Shared Carts](#)

[View Quotes](#)

[Setup Express Checkout Preferences](#)

**Connect to Vision**

Can't find a product you're looking for?

## 3.2 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.

See the following sub-topics for more information:

- [Section 3.2.1, "Shopping Cart Key Features and Benefits"](#)
- [Section 3.2.2, "Active, Saved, and Shared Shopping Carts"](#)
- [Section 3.2.3, "Published and Shared Quotes"](#)
- [Section 3.2.4, "Shopping Lists"](#)

### 3.2.1 Shopping Cart Key Features and Benefits

Oracle iStore shopping carts enable B2B and B2C customers to:

- Add products to carts and then place an order

- Maintain any number of saved carts
- Share carts with other users
- Save products to shopping lists
- Use promotion codes, commitments, and pricing agreements
- Attach files to carts (B2B only)
- Check the availability of items in inventory
- Configure items through guided selling
- Add items to carts by entering part numbers directly (B2B only)
- View and recalculate the total amounts for products in the cart
- Enter decimal quantities for products

Note that some of these features require integration with other Oracle products. See [Section 1.3, "Mandatory Integrations with Other Oracle Applications"](#), and [Section 1.4, "Optional Integrations with Other Oracle Applications"](#), for more information.

For the store administrator, shopping carts are highly configurable, including the ability to:

- Modify the look and feel of the carts and lists using Display Templates
- Turn on or off specific cart features, including shopping lists, cart sharing, and quote publishing
- Set the expiration dates of saved and active carts
- Offer promotion codes, commitments, pricing agreements, and Express Checkout to the customer
- Allow quote publishing from Oracle Quoting
- Utilize Oracle Workflow for e-mail notifications of user events and activities

Security inherent in Oracle iStore ensures that customers do not access each others' carts and information.

Information about checkout features and benefits can be found in [Section 3.3, "Orders"](#), of this guide. For complete information, see the *Implementing Carts and Orders* chapter of the *Oracle iStore Implementation and Administration Guide*.

## 3.2.2 Active, Saved, and Shared Shopping Carts

Customers access saved or shared shopping carts in the **My Carts** page within the **Cart** menu. Carts are organized into the following areas of the page:

- **Saved Carts** --- Customers' saved carts appear here. See [Section 3.2.2.1, "Saved Carts"](#), for more details.
- **Shared Carts** --- Customers' shared carts appear here, separated by type:
  - **Carts Shared By You** --- Carts the customer is currently sharing with other users appear here.
  - **Carts Shared With You** --- Carts being shared with a B2B customer display here.
  - **Cart Retrieval Textbox** --- B2C customers enter the unique cart retrieval number in a textbox to retrieve their shared carts.

See [Section 3.2.2.2, "Shared Carts"](#), for more details.

B2B and B2C customers see different versions of the **My Carts** page, as shown in the following two figures.

Figure 3–3 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
<a href="#">Desktop for Home</a> 	10-OCT-2001	30-OCT-2001
<a href="#">music</a>	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
<a href="#">Christmas list</a>	12-Mar-2002	12-Mar-2002	Sanjay Narang	Full
<a href="#">Published cart</a>	15-Apr-2002	15-Apr-2002	Inderpreet Wadhwa	Read Only
<a href="#">computer</a>	12-Mar-2002	12-Mar-2002	Ron Huddleston	Update
<a href="#">notebook</a>	15-Apr-2003	15-Apr-2003	Ron Huddleston	Read Only

#### Carts Shared By You

Cart Name	Created Date	Expiration Date
<a href="#">test</a>	12-Mar-2002	12-Mar-2002
<a href="#">Published cart</a>	15-Apr-2002	15-Apr-2002

Figure 3–4 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
<a href="#">Desktop for Home</a>	10-OCT-2001	30-OCT-2001
<a href="#">test2</a>	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
<a href="#">Christmas list</a> 	12-Mar-2002	12-Mar-2002
<a href="#">Published cart</a>	15-Apr-2002	15-Apr-2002

The cart names are hyperlinks with which the customers can access the **Saved Cart Details** or **Shared Cart Details** pages. B2C users must enter the unique cart retrieval number in the textbox or select the URL hyperlink in the notification e-mail. From these pages, customers can activate the carts and modify them. See [Section 3.2.2.1, "Saved Carts"](#), and [Section 3.2.2.2, "Shared Carts"](#), for more information.

### 3.2.2.1 Saved Carts

Customers can press the **Save Cart** button at any time to save a cart. The cart will be saved until it expires. If customers do not explicitly save them, carts are system-saved and named.

To retrieve a saved cart from the **My Carts** page, customers select the hyperlink of the cart name, thus retrieving the **Saved Cart Details** page. From this page, a limited set of cart activities is available, depending upon the features that the store administrator has configured. Customers must activate the cart to fully modify it. See [Section 3.2.2.3, "Active Carts"](#), for more details.

The following figure shows an example of the **Saved Cart Details** page.

Figure 3–5 Saved Cart Details Page

**Saved Cart Details: Desktop for Home**

**Cart Information**

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	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	
					<b>Total: \$3,391.23</b>	

**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 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  Payment Type: Tim Smith, Visa, XXXXXXXXXXXX1111, 01/2003  PO Number: CA18950

From the **Saved Cart Details** page, customers typically can:

1. **Activate the Cart** -- Customers press the **Update Cart** or **Checkout** buttons to activate and then modify a cart. See [Section 3.2.2.3, "Active Carts"](#), for more information.
2. **Share the cart** --- Customers press the **Share Cart** button to begin the process of sharing the cart. The Share Cart button only appears if the store administrator has enabled this feature. See [Section 3.2.2.2, "Shared Carts"](#), for more information.
3. **Checkout/Place Order** --- Customers press the **Checkout** button to enter the checkout phase and place an order with the cart. See [Section 3.3, "Orders"](#), for more details.

4. **Delete the cart** --- Customers press the **Delete Cart** button to delete the cart.
5. **View Line Details** --- Customers can select the **Line Details** icon to view a summary of each item's details. This icon only appears if specific item-level features are enabled.

Once the user activates the cart by pressing the **Update Cart** or **Checkout** buttons, the cart becomes the active cart. See [Section 3.2.2.3, "Active Carts"](#), for more information.

### 3.2.2.2 Shared Carts

Both B2B and B2C customers can utilize Oracle iStore's shopping cart sharing functionality to shop and purchase products collaboratively. Store administrators can turn the feature on/off by setting a profile option.

Cart sharing enables multiple customers to make changes to a cart. The actions that a customer receiving a shared cart (*cart recipient*) can perform depend on the access levels granted by the customer initiating the cart sharing (*cart owner*). Cart updates can be seen in real-time by all customers associated with the cart. The cart owner or a recipient with Full access can then place an order with the cart.

Automated notification e-mails keep customers informed of shared cart activities. For example, when the owner shares a cart or changes access levels, the recipients are automatically notified. When the owner stops sharing a cart or an order is placed with a shared cart, all recipients are informed that the cart is no longer available.

Customers retrieve the **Shared Cart Details** page from the **My Carts** page, or by selecting the URL hyperlink in the notification e-mails.

The **Shared Cart Details** page differs depending upon whether the customer is the cart owner or recipient. See the *Oracle iStore Implementation and Administration Guide* for complete details.

The figure below shows the **Shared Cart Details** page for owners.

**Figure 3–6 Shared Cart Details Page - Owners**

**Shared Cart Details: Christmas list**

Click on 'Stop Sharing' button if you don't want to share the cart with recipients anymore.

**Recipients**

List of recipients for the cart. You can add/modify/remove recipients at any time.

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**

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS86311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS86311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS86311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS86311	<a href="#">Vision Pad DX - Mobile Computer</a>	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	
					<b>Total: \$3,391.23</b>	

**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	Bill To: Tim Smith
--------------------	--------------------

The figure below shows the **Shared Cart Details** page for recipients.

**Figure 3–7 Shared Cart Details Page - 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.

#### 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

Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99	List: \$249.99	
				Discount: \$<25.00>	Discount: \$<25.00>	
				Net: \$224.99	Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99	List: \$249.99	
				Discount: \$<25.00>	Discount: \$<25.00>	
				Net: \$224.99	Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99	List: \$249.99	
				Discount: \$<25.00>	Discount: \$<25.00>	
				Net: \$224.99	Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99	List: \$249.99	
				Discount: \$<25.00>	Discount: \$<25.00>	
				Net: \$224.99	Net: \$224.99	
Sub-Total:					\$3,376.28	
Tax:					\$0.00	
Shipping & Handling:					\$14.95	
<b>Total:</b>					<b>\$3,391.23</b>	

#### Customer Information

Customer: Oracle Corp. Tim Smith (408)234-5678 tsmith@oracle.com	Agreement: B2B Contract: 12345
---	-----------------------------------

<b>Shipping Information</b>	<b>Billing and Payment Information</b>
Ship to: Tim Smith Oracle Corp.	Bill to: Tim Smith Oracle Corp.

### 3.2.2.3 Active Carts

Once the user activates the cart by pressing the **Update Cart** or **Checkout** buttons, the cart becomes the active cart.

The following figure shows an example of an active cart, the **Your Shopping Cart** page.

**Figure 3–8 Your Shopping Cart Page**

## Your Shopping Cart

---

**Items**
[Pricing Agreements](#)
[Promotion Codes](#)
[Attachments](#)
[Check Availability](#)

This saved cart 'Desktop for Home' expires on 01-Aug-2002.

Delete	Part Number	Item	UOM	Quantity	Unit Price	Total Price
	AS86311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	<input type="text" value="1"/>	List: \$249.99 Discount: \$<12.50> Net: \$237.49	List: \$249.99 Discount: \$<12.50> Net: \$237.49
	AS86311	<a href="#">Sentinel Custom Desktop</a> <a href="#">Configuration Details</a>	Each	<input type="text" value="1"/>	List: \$2,803.99 Discount: \$<140.20> Net: \$2,663.79	List: \$2,803.99 Discount: \$<140.20> Net: \$2,663.79
	CM76840	<a href="#">Lightning Inkjet Printer</a>	Each	<input type="text" value="1"/>	List: \$300.00 Discount: \$<15.00> Net: \$285.00	List: \$300.00 Discount: \$<15.00> Net: \$285.00

Sub-Total: \$3,376.28  
 Tax: \$0.00  
 Shipping & Handling: \$14.95

Total: \$3,391.23

In the active cart, the customer can:

1. **Continue Shopping** --- Customers can select the **Continue Shopping** button to continue browsing the web site and potentially add more items to the active cart.
2. **Save the cart** --- Customers can select **Save Cart** to save and name the cart. See [Section 3.2.2.1, "Saved Carts"](#), for details.
3. **Delete items** --- Customers select the **Delete** icon, if desired, to remove items from the cart.
4. **Recalculate the cart** --- Customers can select **Recalculate** button to recalculate the cart totals.

5. **Access Pricing Agreements** --- Customers can select **Pricing Agreements** to associate pre-defined pricing agreement with the cart.
6. **Use Promotion Codes** --- Customers can select **Promotion Codes** to enter pre-defined promotion codes.
7. **Add Attachments** --- B2B customers can select **Add Attachments** to attach files to the cart.
8. **Check Product Availability** --- Customers can select **Check Availability** to see if a product is available on their desired shipping dates.
9. **Share the cart** --- Customers can select **Share Cart** to share the cart with other customers. This button only appears if the administrator has enabled the feature. See [Section 3.2.2.2, "Shared Carts"](#), for details.
10. **Save the cart as a list** --- Customers can select **Save to List** to save the items in the cart to a shopping list. This button only appears if the administrator has enabled the feature. See [Section 3.2.4, "Shopping Lists"](#), for details.
11. **Checkout** --- Customers can select **Checkout** to place the order. See [Section 3.3, "Orders"](#), for more information.
12. **Express Checkout** --- Customers can select **Express Checkout** to submit the cart as an Express Checkout order. This button only appears if the administrator has enabled the feature. See [Section 3.3.2, "Express Checkout"](#), for details.

Note that some of this functionality requires additional setup steps and, possibly, integration with other Oracle applications.

### 3.2.3 Published and Shared Quotes

If you integrate Oracle iStore with Oracle Quoting, sales representatives can publish quotes to customers, and customers can share these published quotes with others.

Customers retrieve quotes in the **My Quotes** page within the **Cart** menu. The **My Quotes** page organizes quotes into different areas:

- **Quotes** --- Customers' published quotes display here. See [Section 3.2.3.1, "Published Quotes"](#), for more details.
- **Shared Quotes** --- Customers' shared quotes appear here, separated by type:
  - **Quotes Shared By You** --- Quotes the customer is currently sharing with other users appear here.
  - **Quotes Shared With You** --- Quotes being shared with a B2B customer display here.

- **Quote Retrieval Textbox** --- B2C customers enter the unique quote retrieval number in a textbox to retrieve shared quotes.

See [Section 3.2.3.2, "Shared Quotes"](#), for more information.

B2B and B2C customers see different versions of the **My Quotes** page, as shown in the following two figures.

**Figure 3–9 My Quotes Page - B2B Users**

My Quotes						
<b>Published Quotes</b>						
List of quotes that you have created. Click on an quote name to view the details.						
Quote Name	Quote Number	Expiration Date	Orderable			
<a href="#">Fast Forward</a>	174045294	11-SEP-2002	Yes			
<a href="#">CRM In 90 Days</a>	174045295	12-SEP-2002	No			
<b>Shared Quotes</b>						
<b>Quotes Shared With You</b>						
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
<a href="#">eCommerce Suite</a>	174045291	23-SEP-2002	23-OCT-2002	Sanjay Narang	Full	Yes
<a href="#">ERP Upgrade</a>	274045221	02-OCT-2002	02-NOV-2002	Inderpreet Wadhwa	Read Only	No
<a href="#">Hosting</a>	334045291	11-DEC-2002	11-JAN-2003	Ron Huddleston	Update	Yes
<a href="#">SFA Solution</a>	174045291	24-DEC-2002	24-JAN-2003	Ron Huddleston	Read Only	No
<b>Quotes Shared By You</b>						
List of quotes that you have shared. Click on an quote name to view the details.						
Quote Name	Quote Number	Expiration Date	Orderable			
<a href="#">SFA Solution test</a>	174045294	11-SEP-2002	Yes			
<a href="#">ERP In 30 Days</a>	174045295	12-SEP-2002	Yes			

**Figure 3–10 My Quotes Page - B2C Users**

**My Quotes**

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**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
<a href="#">Fast Forward</a>	174045294	11-SEP-2002	Yes
<a href="#">CRM In 90 Days</a>	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
<a href="#">SFA Solution test</a>	174045294	11-SEP-2002	Yes
<a href="#">ERP In 30 Days</a>	174045295	12-SEP-2002	Yes

The quote names are hyperlinks with which the customer can access the **Quote Details** and **Shared Quote Details** pages. B2C customers must enter the unique quote retrieval number in the **My Quotes** page to retrieve the **Shared Quote Details** page.

See [Section 3.2.3.1, "Published Quotes"](#), and [Section 3.2.3.2, "Shared Quotes"](#), for more information.

See the *Oracle iStore Implementation and Administration Guide*, Integrating Oracle iStore with Oracle Quoting chapter, and the *Oracle Quoting Implementation Guide*, for more information on the integration.

### 3.2.3.1 Published Quotes

One of the many features of Oracle Quoting is the ability for sales representatives to build and then publish quotes to Oracle iStore customers. In addition to originating as published quotes from Oracle Quoting, quotes also can be carts that have become quotes when a customer requests sales representative assistance during checkout -- see [Section 3.3.1.4, "Sales Representative Assistance"](#), for more information.

In the **My Quotes** page, customers select the hyperlink of a published quote to retrieve the **Quote Details** page.

The following figure shows an example of the **Quote Details** page.

**Figure 3–11 Quote Details Page**

Quote Details: Fast Forward (174045294)						
						<input type="button" value="Share Quote"/> <input type="button" value="Checkout"/>
Part Number	Item	UOM	Quantity	Unit Price	Total Price	Line Details
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	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	
					<b>Total: \$3,391.23</b>	
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 REDWOOD SHORES, CA 94404 UNITED STATES			Bill to: Tim Smith Oracle Corp. 500 Oracle Park Way REDWOOD SHORES, CA 94404 UNITED STATES			
Shipping Method: AIR			Payment Type: Tim Smith, Visa,			

In the **Quote Details** page, customers cannot alter quote information -- they can change only payment information --- and quotes can never be activated in the way that carts can. From the **Quote Details** page, customers can checkout with the quote to place the quote's items as an order, or they can share the quote with other users. See [Section 3.2.3.2, "Shared Quotes"](#), and [Section 3.3, "Orders"](#), for more information.

### 3.2.3.2 Shared Quotes

If the store administrator has enabled the share cart functionality, customers can share their quotes with others in a similar manner as they would share carts. B2B customers can share with other customers in their organization, while B2C customers can share with anyone with a valid e-mail address. In all cases, the customer must register in order to perform any action with the quotes.

To share a quote, customers press the **Share Quote** button from the **Quote Details** page, and then select recipients and access levels for the recipients. For quotes, Update access means the recipient also can update payment information. Full access means the recipient can place the order.

Customers retrieve the **Shared Quote Details** page from the **My Carts** page, or by selecting the URL hyperlink in the notification e-mails.

The **Shared Quote Details** page differs depending upon whether the customer is the quote owner or a recipient. See the *Oracle iStore Implementation and Administration Guide* for complete details.

The following figure shows an example of the quote owner's **Shared Quote Details** page.

Figure 3–12 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.						<input type="button" value="Stop Sharing"/> <input type="button" value="Checkout"/>
Recipients						
						<input type="button" value="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	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	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	
					<b>Total: \$3,391.23</b>	
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			

In addition to viewing quote details, the quote owner can perform the following actions on the shared quote:

- **Stop Sharing** --- The quote owner presses **Stop Sharing** to end the quote sharing. All customers involved receive e-mail notification
- **Checkout/Place Order** -- The quote owner can checkout with the quote and place it as an order.

- 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 a quote recipient's **Shared Quote Details** page.

**Figure 3–13 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.

**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	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	List: \$249.99 Discount: \$<25.00> Net: \$224.99	List: \$249.99 Discount: \$<25.00> Net: \$224.99	
AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	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	
<b>Total: \$3,391.23</b>						

**Customer Information**

Customer: Oracle Corp. Tim Smith (408)234-5678 tsmith@oracle.com	Agreement: B2B Contract: 12345
---	-----------------------------------

<b>Shipping Information</b>	<b>Billing and Payment Information</b>
Ship to: Tim Smith Oracle Corp. 500 Oracle Park Way REDWOOD SHORES, CA 94404 UNITED STATES	Bill to: Tim Smith Oracle Corp. 500 Oracle Park Way REDWOOD SHORES, CA 94404 UNITED STATES

In addition to viewing quote details, quote recipients can perform the following actions on the shared quote:

- **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.
- **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.

For complete information, see the Implementing Carts and Orders chapter of the *Oracle iStore Implementation and Administration Guide*.

### 3.2.4 Shopping Lists

Shopping lists allow customers to save items in shopping carts to lists. Store administrators can turn the feature on/off by setting a profile option. 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. 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).

Following is the process flow for shopping lists:

1. Customers press 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). Optionally, the user can enter comments for the list in the **Comments** textbox.
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 following figure shows an example of this page:

**Figure 3–14 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
<input type="checkbox"/>	Paithini Saree..	<a href="#">Paithini Saree</a>	Each_US	<input type="text" value="1"/>
<input type="checkbox"/>	AS72111..	<a href="#">Envoy Deluxe Laptop</a>	Each_US	<input type="text" value="1"/>
<input type="checkbox"/>	AS66311..	<a href="#">Vision Pad DX - Mobile Computer</a>	Each_US	<input type="text" value="1"/>

4. To add items to a cart, customers select the appropriate items in the shopping list and press **Add to Cart**.
5. Customers also can:
  - Update quantities for items
  - Delete items in the list or the entire list
  - Drill down to product details

For complete information, see the Implementing Carts and Orders chapter of the *Oracle iStore Implementation and Administration Guide*.

### 3.3 Orders

Oracle iStore ships with full checkout and order placement capabilities in the Customer UI.

See the following sub-topics for more information:

- [Section 3.3.1, "Checkout and Order Placement"](#)
- [Section 3.3.3, "Order Tracking and Cancellation"](#)

Some of the functionality discussed in this section requires integration with Oracle iStore dependencies and assumes you have performed the required setup tasks. For more information, see the *Oracle iStore Implementation and Administration Guide*, *Before You Begin* and *Required Implementation Tasks* chapters.

## 3.3.1 Checkout and Order Placement

When customers press the **Checkout** button, Oracle iStore initiates the checkout/order placement phase. Customers then enter shipping and billing information and place the order. See the following for more information:

- [Section 3.3.1.1, "Shipping Information"](#)
- [Section 3.3.1.2, "Billing Information"](#)
- [Section 3.3.1.4, "Sales Representative Assistance"](#)
- [Section 3.3.1.3, "Terms and Conditions"](#)

### 3.3.1.1 Shipping Information

In the **Checkout: Shipping Information** page, customers select shipping methods and select or enter address information. Selecting and entering address information is different for B2B and B2C customers: B2C users select from a drop-list of existing addresses, while B2B users can change the customer, contact, and address -- if they have the required permissions in their user roles.

If the store administrator has enabled the functionality, shipping instructions and item-level shipping information also are available.

For more information, see *Oracle iStore Implementation and Administration Guide*, *Implementing Payment Types and Shipping Methods* and *Implementing Carts and Orders* chapters.

### 3.3.1.2 Billing Information

In the **Checkout: Payment and Billing Information** page, customers:

- Select payment types
- Select or enter billing address information. Selecting and entering address information is different for B2B and B2C customers: B2C users select from a drop-list of existing addresses, while B2B users can change the customer, contact, and address -- if they have the required permissions in their user roles.
- Enter commitments in the billing page, if this functionality has been enabled
- Enter non-taxable order information
- Enter item-level billing information (B2B only)

For more information, see *Oracle iStore Implementation and Administration Guide*, Implementing Payment Types and Shipping Methods and Implementing Carts and Orders chapters.

### 3.3.1.3 Terms and Conditions

In the **Review and Place Order** page, customers can select the *review terms and conditions* hyperlink to review the terms and conditions of the standard contract (set up through Oracle Sales Contracts). If the customer rejects the terms and conditions, the cart becomes a quote in Oracle Quoting, if Oracle Quoting integration has been implemented, or it follows the Contracts flow, if the applicaiton is set up to integrated with Oracle Sales Contracts.

For more information, see the Integrating Oracle iStore with Oracle Sales Contracts, Integrating Oracle iStore with Oracle Quoting, and Implementing Carts and Orders chapters of the *Oracle iStore Implementation and Administration Guide*.

### 3.3.1.4 Sales Representative Assistance

If you have integrated Oracle iStore with Oracle Quoting and set up the Sales Assistance feature, customers can request sales assistance in the **Review and Place Order** page. 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. The sales representative can then make changes to the quote and publish the changes to the customer in the Customer UI.

This functionality requires that both Oracle Quoting and the Sales Assistance feature have been implemented. For more information, see the *Oracle iStore Implementation and Administration Guide*: Integrating Oracle iStore with Oracle Sales Contracts, Integrating Oracle iStore with Oracle Quoting, and Implementing Customer Assistance chapters.

### 3.3.1.5 Placing the Order

When the customers have completed the information entry process, they press the **Place Order** button in the **Review and Place Order** page to commit the order. In a typical implementation, Oracle iStore submits the order to Oracle Order Management.

For more information, see the Implementing Carts and Orders chapter of the *Oracle iStore Implementation and Administration Guide*.

## 3.3.2 Express Checkout

Available for all registered customers, Express Checkout allows orders to be submitted as batch jobs through a concurrent program. Oracle iStore automatically places the orders, depending on how often the concurrent program is run.

Customers must enable Express Checkout and set up their Express Checkout preferences before they can use the feature.

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. The **Express Checkout** button appears in the catalog and shopping cart pages.

## 3.3.3 Order Tracking and Cancellation

Once an order is submitted in an Oracle iStore web store, customers can log into the web store and access their order details by selecting the **Orders** icon. Customers also can cancel their orders, if enabled.

### 3.3.3.1 Order Tracking

In the Customer UI, the **Orders** button gives customers access to the following order information and functionality:

- Search mechanism
- Order details
- Invoice details
- Payment details
- Shipping details

For B2B customers, only orders belonging to their current organization display.

### 3.3.3.2 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.

For more information, see the Implementing Carts and Orders chapter of the *Oracle iStore Implementation and Administration Guide*.

## 3.4 Users and Registration

Oracle iStore features support for multiple user types, self-service customer registration, storage of personal customer data, and user management.

Refer to the following sub-topics for more information:

- [Section 3.4.1, "User Types and Access"](#)
- [Section 3.4.2, "User Registration"](#)
- [Section 3.4.3, "B2B User and Role Management"](#)
- [Section 3.4.4, "Customer Information"](#)
- [Section 3.4.5, "Opting In or Out"](#)

### 3.4.1 User Types and Access

In addition to the administrative users --- the store administrator and concurrent programs administrator discussed in the *Oracle iStore Implementation and Administration Guide* --- Oracle iStore also supports the following customer user types:

- Guest users
- Business-to-business (B2B) users
- Business-to-consumer (B2C) users
- B2B Primary users
- B2B Reseller users

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 self-registering, every B2B user receives, by default upon approval, the following roles:

- Primary User (administrative user) role
- Regular B2B User role

For information on supported user types, see the following:

- [Section 3.4.1.1, "Guest Users"](#)
- [Section 3.4.1.2, "B2C Users"](#)
- [Section 3.4.1.3, "B2B Users"](#)

- [Section 3.4.1.4, "Reseller Users"](#)

### 3.4.1.1 Guest Users

Guest users (also called walk-in users) can browse web store catalog pages and create shopping carts. However, they cannot set up a user profile, save or share carts, nor place or track orders.

Except for stores flagged as inaccessible to guest users, the specialty stores automatically log in the guest users with limited permissions. 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 guest users cannot see each other's changes. Guest users who attempt to perform actions available only to logged-in users are prompted to log in, and to register if necessary.

### 3.4.1.2 B2C Users

Business-to-consumer (B2C) users are individual customers not associated with an organization. By default, when they register through Oracle iStore, they are immediately approved and can access the specialty stores. You can control whether or not B2C users are allowed to register in your specialty stores by setting a profile option. B2C users also do not have assigned roles.

### 3.4.1.3 B2B Users

Business-to-business (B2B) users represent customer organizations and should have a unique organization number (unless registering an organization for the first time). You can control whether new B2B users require approval before accessing the web stores, by setting a profile option. B2B users also receive a default role upon approval.

**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. Subsequent users who register then can use this organization ID when registering. In Oracle iStore, user management tasks are performed in the Customer UI User Management and Role Management pages accessible through the **Profile** button.

### 3.4.1.4 Reseller Users

Administrators may wish to set up reseller users. These are 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 more information, see the *Oracle iStore Implementation and Administration Guide*, *Implementing Users and Registration* chapter, and the *Oracle CRM Technology Foundation Concepts and Procedures* User Management documentation available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 3.4.2 User Registration

If not set up through an administrator, customers register in the **Sign In** page in the Customers UI. B2B customers select the option to register as a member or an organization, while B2C customers register as individuals.

Upon approval, all users receive a default customer responsibility. B2B users require an additional step of assigning roles to complete their setup, while B2C users have immediate access to the specialty stores.

**Login Assistance** -- If customers forget their user sign-in information, they can select the *Forgot your Username/Password Information* link in the **Sign In** page, and this information will be automatically e-mailed to them.

The following figure shows the **Sign In** page.

Figure 3–15 Sign In Page

**Oracle iStore**  
Vision.com

Stores Cart Orders Profile Sign In Help

Home Desktops Notebooks Printers Peripherals

Quick Search All Products  Go Advanced Search

## Sign In

### Returning user, please login

Username:

Password:

[Forgot your Username/Password information?](#)

### New user, please register

**Business or Organization**  
If you are representing your business or organization, click above to register.

**Individual or Consumer**  
If you are an individual or consumer, click above to register.

[Home](#) | [Desktops](#) | [Notebooks](#) | [Printers](#) | [Peripherals](#)  
[Stores](#) | [Cart](#) | [Order](#) | [Profile](#) | [Sign In](#) | [Help](#)

For more information, see the *Oracle iStore Implementation and Administration Guide*, *Implementing Users and Registration* chapter, and the *Oracle CRM Technology Foundation Concepts and Procedures User Management* documentation available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

### 3.4.3 B2B User and Role Management

Once an organization's Primary User (or users) has been set up, this B2B user can serve as the user management administrator. Primary Users can create users within their organization, assign roles, and reset passwords. Two permissions in their user role allow them to access iStore's user and role management subtabs in the Customer UI **Profile** menu.

The following figures show examples of the user and role management pages available to the Primary User.

**Figure 3–16 User Management Page**

The screenshot shows the 'User Management' page with a table of users. The table has six columns: First Name, Middle Name, Last Name, Email, Username, and Password. The first name field is a hyperlink. There are four rows of user data and three empty rows below. An 'Apply' button is in the top right, and '1 to 4 of 4' is shown below it and at the bottom right of the table.

First Name	Middle Name	Last Name	Email	Username	Password
<a href="#">cmyrick_b2b</a>		cmyrick_b2b	cmyrick@oracle.com	CMYRICK_B2B	<input type="password"/>
<a href="#">test</a>		user3	carmen.myrick@oracle.com	TESTUSER3	<input type="password"/>
<a href="#">test</a>		user1	cmyrick@oracle.com	TESTUSER1	<input type="password"/>
<a href="#">test</a>		user4	carmen.myrick@oracle.com	TESTUSER4	<input type="password"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="password"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="password"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="password"/>

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 3–17 User Details Page**

The screenshot shows the 'User Details' page. It has sections for 'User', 'Account 1', and 'Assign Roles'. The 'User' section shows Username: TESTUSER3 and Name: test user3. The 'Account 1' section shows Account Number: 3072 and Account Name: . The 'Assign Roles' section has a table with three rows of roles. There are 'Cancel', 'Apply', and 'Assign Accounts' buttons.

Assign	Role Name	Description
<input type="checkbox"/>	IBE_BUSINESS_USER_ROLE	Business User Role
<input type="checkbox"/>	IBE_DEFAULT_ROLE	Default Role
<input type="checkbox"/>	IBE_PRIMARY_USER_ROLE	Primary User Role

After users are approved, Primary Users award roles to them.

The following figure shows the **Role Management** page available to Primary Users.

**Figure 3–18 Role Management Page**

Role Management		
Role Name	Description	Remove
<a href="#">IBE BUSINESS USER ROLE</a>	Business User Role	
<a href="#">IBE DEFAULT ROLE</a>	Default Role	
<a href="#">IBE PRIMARY USER ROLE</a>	Primary User Role	

### 3.4.4 Customer Information

For the convenience of customers, Oracle iStore allows customers to store their user data and to manage this data in a self-service fashion. Customers can maintain several billing and shipping addresses (along with associated phone, fax, and e-mail data) and specify whether an address is a preferred billing or shipping address. Payment information can be stored as well, allowing Oracle iStore to automatically default this information into the customers' shopping carts.

When a B2B user enters an address in the Address Book, the address information is associated with the user, not with the organization.

Oracle iStore defaults the preferred shipping and billing information into the cart during the checkout phase. When customers place the order, the addresses used in the order are populated into Oracle Receivables, Oracle Order Management, and other ERP modules.

### 3.4.5 Opting In or Out

Oracle applications such as Oracle Sales Online and Oracle TeleSales can send marketing communications to customers whose contact information is captured by Oracle iStore. In the registration, Profile, and checkout pages, Oracle iStore captures the customer's address, telephone numbers, fax number, and e-mail address.

Users may choose whether or not to receive marketing communications, such as promotions and newsletters. A checkbox in the registration and **Profile** pages enables this choice. Users can select the checkbox to receive marketing information ("opt in") or deselect it to refuse marketing information ("opt out"). The default choice is to opt out.

If a customer is registered by an administrator, the user's contact preference is automatically set to opt out.

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# Store Administration Quick Steps

This chapter contains quick steps for common user procedures in the Store Administration UI.

For complete Oracle iStore 11i implementation and usage information, see the *Oracle iStore Implementation and Administration Guide*, available on [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Main topics in this chapter include:

- [Store Creation Quick Steps](#)
- [Sections Quick Steps](#)
- [Products Quick Steps](#)
- [Content and Display Templates Quick Steps](#)
- [Reports Quick Steps](#)

## 4.1 Store Creation Quick Steps

Topics in this section include:

- [Section 4.1.1, "Starting Store Creation"](#)
- [Section 4.1.2, "Setting Store Languages"](#)
- [Section 4.1.3, "Setting Store Currencies"](#)
- [Section 4.1.4, "Setting Store Price Lists"](#)
- [Section 4.1.5, "Setting Store Maximum Orderable Amount"](#)
- [Section 4.1.6, "Setting Store Payment Types"](#)
- [Section 4.1.7, "Setting Store Shipping Methods"](#)

- [Section 4.1.8, "Setting Store Responsibilities"](#)
- [Section 4.1.9, "Setting Store Display Name Order"](#)
- [Section 4.1.10, "Setting Store Access Restrictions"](#)
- [Section 4.1.11, "Setting Store Payment Threshold"](#)

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

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### 4.1.1 Starting Store Creation

Use the following procedure to start the store creation.

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

#### Steps

1. Log into the Store Administration UI and navigate to **Stores > Create a Store** to launch the **Create Store** page.
2. Enter basic information for a store:
  - a. **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.
  - b. **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.
  - c. **Description** --- Enter a description for the store. You can enter this at a later time if you wish.
  - d. **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.
  - e. **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, you must end-date it.
  - f. **Default Language** --- This textbox will display the current default language for the store. To select different 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 4.1.2, "Setting Store 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.

- g. Default Currency** --- Select default currency. 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 4.1.3, "Setting Store 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.

- h. Default Walk-in Price List** --- Select the default price list for walk-in (guest) users of the store. 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 4.1.4, "Setting Store Price Lists"](#).
- i. Catalog Root Section** --- Select the parent node (or browsing section) under which store resides. 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.
- j. Allow un-registered users to browse the store** --- Select to allow **unregistered users** (guest/walk-in users) to navigate this store's specialty stores. Specialty stores not allowing unregistered users display an asterisk (\*) near display names in the Customer UI.
- k. Allow customers to check item availability** --- Select 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.
- l. 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.



See the Implementing Globalization and Multiple Organization Architecture chapter of the *Oracle iStore Implementation and Administration Guide* for more details on multiple language setup and multi-org implementation.

### 4.1.3 Setting Store Currencies

Currencies must be set up in Oracle General Ledger before they can be selected in the Store Administration UI.

#### Steps

1. Log into the Store Administration UI and navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Pricing** to retrieve the **Pricing** page displaying currencies supported by the store. The **Pricing** page shows and allows selection of currencies, price lists, maximum orderable amounts, and payment thresholds for a store.
3. To add a currency: Select **Add Currency** to retrieve the **Search and Select: Currencies** page where you can search for and select currencies.

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

See the Before You Begin chapter of the *Oracle iStore Implementation and Administration Guide* for summarized currency setup information. For complete information, see the *Oracle General Ledger User's Guide*.

### 4.1.4 Setting Store Price Lists

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.

#### Steps

1. Log into the Store Administration UI and navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Pricing** to retrieve the **Pricing** page showing and allowing update of all currencies, price lists, maximum orderable amounts, and payment thresholds associated with a store.
3. For each supported currency, choose the price lists for **Walk-in Customers** (guest users), **Individual Customers** (B2C users), and **Business Customers** (B2B

users). Use flashlight icons to search and select price lists in **Search and Select: Price Lists** page.

4. Back in the **Pricing** page, press **Apply** to save changes. The currencies and price list selections are now saved to the database.

See the Implementing Pricing chapter of the *Oracle iStore Implementation and Administration Guide* for pricing setup information.

### 4.1.5 Setting Store Maximum Orderable Amount

Optional step -- After you set the maximum orderable amount for a currency, any order placed over this amount in the applicable currency will error.

#### Steps

1. Log into the Store Administration UI and navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Pricing** to retrieve the **Pricing** page showing and allowing update of all currencies, price lists, maximum orderable amounts, and payment thresholds associated with a store.
3. For each currency, in the **Maximum Amount** textbox, enter 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.
4. Press **Apply** to save changes.

### 4.1.6 Setting Store Payment Types

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.

#### Steps

1. Log into the Store Administration UI and navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Payment** to retrieve the **Payment Types** page showing all payment types supported by this store.
3. **To add payment types:** Select **Add Payment Type** to retrieve the **Select: Payment Types** page where you can select the payment types this store to support.

4. Back in **Payment Types** page, select **Apply** to save changes.
5. 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.

See the Implementing Payment Types and Shipping Methods chapter of the *Oracle iStore Implementation and Administration Guide* for more information.

### 4.1.7 Setting Store Shipping Methods

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.

#### Steps

1. Log into the Store Administration UI and navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Shipping** to retrieve the **Shipping Methods** page displaying all supported shipping methods for this store.
3. To add a shipping method: Select **Add Shipping Method** to retrieve the **Select: Shipping Methods** page where you can select shipping methods this store to support.

See the Implementing Payment Types and Shipping Methods chapter of the *Oracle iStore Implementation and Administration Guide* for more information.

### 4.1.8 Setting Store Responsibilities

You must assign at least one Oracle iStore customer responsibility to a store. In addition:

- The responsibility of the user placing an order --- through the setting of the **MO: Operating Unit** profile --- determines the operating unit against which the order is placed.

- Only iStore (**IBE**) responsibilities are supported for use in your stores.
- Each iteration of a store plus a responsibility makes a **specialty store** in the Customer UI.
- As a best practice, use **one responsibility per store**.
- 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; you can use the Responsibilities page to remove the mapping.

### Steps

1. Log into the Store Administration UI and navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Responsibility** to retrieve the **Supported Responsibilities** page. 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.
3. **To map a new responsibility to the store:** Select **Add Responsibility** to retrieve the **Search and Select: Responsibility** page where you can search for and select responsibilities.

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

4. **Enter Display Names:** In the **Responsibilities** page, in the **Store Display Name** field, enter a 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.

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

See the Required Implementation Tasks chapter of the *Oracle iStore Implementation and Administration Guide* for more information.

### 4.1.9 Setting Store Display Name Order

Optional step -- Manually re-order 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 navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Responsibility** to retrieve the **Supported Responsibilities** page.
3. Select **Display Order** to retrieve the **Display Order** page. Use windows to select display order.
4. Press **Apply** to save changes.

### 4.1.10 Setting Store Access Restrictions

Optional step -- Set access restrictions based on users' organizations (B2B only).

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 navigate to the **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Select **Access** to retrieve the **Access Restrictions** page.
3. Select the appropriate radio button:
  - **No restriction:** Select to have no organization-related access restrictions on the store

- **Exclude the following organizations:** Select to restrict access to the store by users associated with the organization(s) you specify
  - **Include the following organizations:** Select to allow access to the store only by users associated with the organization(s) you specify
4. To add an organization to the list: Select the **Add Organization** button to retrieve the **Search and Select: Organization** page where you can search for and select organizations.
  5. Back in **Access Restrictions** page, save changes by pressing **Apply**. Remember to check that the appropriate **access restriction radio button** is selected at the top of the page.
  6. In the **Start Date** field, use the calendar icon to set the start date for the access restriction.
  7. Optionally, enter an **End Date** using the calendar icon.
  8. Press **Apply** to save changes.

#### 4.1.11 Setting Store Payment Threshold

Optional step -- Set 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.

##### Steps

1. Log into the Store Administration UI and navigate to **Stores** tab. Select store and press **Update** to launch the **Update Store: Details** page.
2. Ensure that the **Enable Threshold for Payment Types** checkbox is active.
3. 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.
4. 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).
5. 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.

6. 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.
7. Press **Apply** 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.
9. Press **Apply** to save changes.

## 4.2 Sections Quick Steps

Topics in this section include:

- [Section 4.2.1, "Creating Sections"](#)
- [Section 4.2.2, "Duplicating Sections"](#)
- [Section 4.2.3, "Adding Products to Sections Using the Sections Pages"](#)
- [Section 4.2.4, "Assigning Sections to Stores"](#)
- [Section 4.2.5, "Adding Content to Sections"](#)
- [Section 4.2.6, "Setting Display Templates for Sections"](#)
- [Section 4.2.7, "Setting the Display Order of Section Descendants"](#)
- [Section 4.2.8, "Searching Sections"](#)

For more information, see the Implementing Customer UI Catalog chapter of the *Oracle iStore Implementation and Administration Guide*.

### 4.2.1 Creating Sections

Use the following procedure to create a section:

## Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**.
2. Select the **Create Sections** icon in the row of the parent section.

The graphic below shows the **Create Section icon** in the **Sections** summary page.

**Figure 4–1 Create Section Icon**



3. In the **Create Section** page, enter/set the following information (required fields are marked with an asterisk):
  - **Section Name** --- Name of section; will appear in Customer UI
  - **Section Code** --- Currently, useful only for your internal business purposes
  - **Short Description** --- Short description for section; will display in Customer UI if being used by an applicable template
  - **Long Description** --- Long description for section; will display in Customer UI if being used by an applicable template
  - **Keywords** --- After you enter keywords, you can search by keyword in search utility; separate multiple keywords with commas
  - **Parent Section** --- Flashlight icon launches **Search and Select: Catalog Sections** page to select parent section
  - **Featured Section** --- Select to flag section as *Featured* (cannot contain subsections, only products). Non-featured sections are *Navigational* -- these can contain products **or** subsections, but not both.
  - **Status** --- Select **Published/Unpublished** -- Unpublished will never display in Customer UI, but will show to administrator in Preview mode
  - **Apply status to all descendant sections** --- Flag to make descendent (child/subsections) sections have the same Published or Unpublished status
  - **Start Date** --- Section available in Customer UI on this date
  - **End Date** --- Section no longer available in Customer UI on this date
4. Press the **Apply** button to save changes. The newly created section appears in the Catalog Hierarchy list in the Sections page.

### 4.2.1.1 Deleting Sections

Delete a section at any time: Select section in **Catalog Hierarchy** page; press **Delete**. All children (subsections or products) are removed.

## 4.2.2 Duplicating Sections

**Note:** When a section is duplicated, all the subsections under the original section are duplicated. However, products, content, 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 and navigate to **Catalog > Sections**. Select the section to duplicate, and press **Duplicate**.
2. In the **Duplicate Section** page, enter a new, unique name for the section in the **New Section Name** field.
3. 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.
4. Select the **Apply** button to save changes. The duplicated section and all of its children (if applicable) appears in the Catalog Hierarchy list in the Sections page.

## 4.2.3 Adding Products to Sections Using the Sections Pages

For instructions on how to assign sections to a single product using the Products pages, see [Section 4.3.2, "Adding Products to Sections Using the Products Pages"](#).

Use the following procedure to add products to a section.

### Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**. In the **Products** column, select the **Add Products** icon next to the section.

Remember, Navigational sections can have products or sections, but not both; Featured sections can have only products.

The graphic below shows the **Add Products icon** in the **Sections** summary page.

**Figure 4–2 Add Products Icon**



The **Update Product Assignments** page appears.

2. In the **Update Product Assignments** page, select **Add Products to Section** to retrieve the **Search and Select: Products** page, where you can select product(s).
3. Back in the **Update Product Assignments** page, the products chosen in the previous step will display in the page, along with any other previously assigned products.
  - a. **Start Date** field will be populated with the product's create date from Oracle Inventory. You can change this value if desired. If you change it, the value is not changed in inventory, but rather stored in iStore schema.
  - b. 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.
4. Select **Apply** 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.

## 4.2.4 Assigning Sections to Stores

Use the following procedure to assign a section to a store.

### Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**. Select applicable section and press **Update**.

**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.
2. Select **Stores** to retrieve **Update Section: Stores** page. In **Store Exclusion** area, **Included Stores** and **Excluded Stores** windows display stores in which this section is included/excluded. By default, a newly created section automatically is included in all stores to which its parent section belongs.

Use the shuttle windows and the arrow keys to change the store assignments for the section. 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.

3. Optionally, select **Include this section in all future stores whose root section is an ancestor of this section** checkbox to make this section automatically included in other stores whose root section is an ancestor of this section.
4. Select **Apply** to save changes.

## 4.2.5 Adding Content to Sections

Use the following procedure to add content to a section.

### Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**. Select applicable section and press **Update**. The **Update Section: Details** page appears.
2. Select **Content** to retrieve the **Update Section: Content** page listing existing content components available for sections. Content component names appear in **Select Media** area. Map content component to media object: Select flashlight icon to launch the **Search and Select: Media Object** page. Select media object.
3. Back in **Update Section: Content** page, selected media object displays next to content component.
4. Press **Apply** to save changes.

Optionally:

- Select **Create Media Object icon** and create a new media object; see [Section 4.4.1, "Creating Media Objects"](#).
- Select **Show Details** to show store/language mappings and add content.

In **Show** mode, optionally:

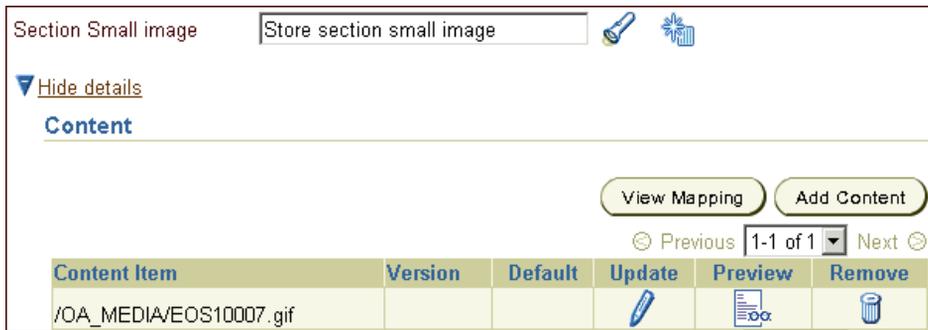
--Select **View Mapping** to view store/language mappings for content associated to the media object; if no store/language mappings exist, button is de-active.

--Select **Add Content** to add content to the media object; if no media object has been selected, then button is de-active. For steps, see [Section 4.4.2, "Assigning Content Items to Media Objects"](#).

5. If you have not already done so, map a content source file to the media object. See [Section 4.4.2, "Assigning Content Items to Media Objects"](#).

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. The create media object icon displays near the flashlight icon.

**Figure 4–3 Update Section: Content Page with Media Object Mapped for Section**



## 4.2.6 Setting Display Templates for Sections

Use the following procedure to map a Display Template to a section.

For a complete list of section Display Templates, see the *Oracle iStore Implementation and Administration Guide*, Implementing Customer UI Catalog chapter.

### Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**. Select the section and press **Update**. The **Update Section: Details** page appears.
2. Select **Display Template** to retrieve the **Update Section: Display Template** page.
3. From **Select a Display Template** LOV, select appropriate Display Template **category** for section and press **Go**. The screen refreshes, with the category's templates appearing.
4. To use the default template, select the **Default Template** option.

5. To use a template from the template gallery, select a template's radio button and press **Apply**.

## 4.2.7 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. 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.

For information on using the Advanced SQL feature, see the *Oracle iStore Implementation and Administration Guide*, Implementing Customer UI Catalog chapter.

- **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 re-ordering of both products and sections simultaneously.

### 4.2.7.1 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. Note that this will be the **only option available** if the section's descendants are **subsections** and not products.

#### Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**. Select the section and press **Update**. The **Update Section: Details** page appears.
2. Select **Display Order** to retrieve **Update Section: Display Order** page.
3. Select *Or use the reordering shuttle table below* option and use shuttle windows to set order of section descendants.
4. Select **Apply** to save changes.

### 4.2.7.2 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. See the

*Oracle iStore Implementation and Administration Guide*, Implementing Customer UI Catalog chapter, for information on this feature.

## 4.2.8 Searching Sections

You can perform a Simple or Advanced search for sections.

### Simple Search

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**.

Search by:

- **Section Name**
- **Section Code**
- **Keywords** -- Keywords you have entered
- **Status** -- Select Published or Unpublished

Enter all or partial values in textbox. Search utility is case-insensitive. Use % symbol as a wildcard.

2. Press **Enter** or **Go** to engage search.

### Advanced Search

Use the following steps to perform an advanced search of the section hierarchy:

1. Log in to the Store Administration UI and navigate to **Catalog > Sections**. Select **Advanced**. The Catalog Hierarchy, **Advanced Search** page displays.

2. In Advanced search, you can search by:

- **Section Creation Date** --- Select **From Date** and **To Date**
- **Section Name**
- **Section Code**
- **Keywords** --- Keywords you have entered

Enter all or partial values in textbox. Search utility is case-insensitive. Use % symbol as a wildcard.

3. Press **Enter** or **Go** to engage search.

## 4.3 Products Quick Steps

Topics in this section include:

- [Section 4.3.1, "Updating Product Details"](#)
- [Section 4.3.2, "Adding Products to Sections Using the Products Pages"](#)
- [Section 4.3.3, "Including or Excluding Products from Stores"](#)
- [Section 4.3.4, "Setting Content at the Product Level"](#)
- [Section 4.3.5, "Setting Display Templates for Products"](#)
- [Section 4.3.6, "Searching for Products"](#)

For more information, see the *Implementing Products* and *Implementing Customer UI Catalog* chapters of the *Oracle iStore Implementation and Administration Guide*.

### 4.3.1 Updating Product Details

Use the following procedure to update a product's details.

#### Steps

1. Log into the Store Administration UI and navigate to **Catalog > Products**. Select the product and press **Update**.
2. In the **Product Details** page, you can modify: Product Name, Description, and Web Status flag. Note that these changes **do** change the product information in inventory.
3. Select **Apply** to save the changes.

### 4.3.2 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 and navigate to **Catalog > Products**. Select the product and press **Update**. The **Update Product: Details** page appears.
2. Select **Sections** to retrieve the **Update Product: Sections** page.

3. Select **Add Product to Sections** to retrieve the **Search and Select: Catalog Sections** page, where you can search for and select appropriate sections. Only sections who are candidates for product assignment will display.
4. The product is added to the section(s). Remember that the product and its section must be in Published status and within valid dates to appear in the Customer UI. Also, they must be included in a store and the store must have valid dates.

### 4.3.3 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 and navigate to **Catalog > Products**. Select the product and press **Update**. The **Update Product: Details** page appears.
2. Select **Stores** to retrieve the **Update Product: Stores** page, showing all store assignments for the product.
3. Use **Included Stores** and **Excluded Stores** windows to flag which stores the product should be included in.
4. Select **Apply** to save changes.

### 4.3.4 Setting Content at the Product Level

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 and navigate to **Catalog > Products**. Select the product and press **Update**. The **Update Product: Details** page appears.
2. Select **Content** to retrieve the **Update Product: Content** page listing product-class content components. Map content component to media object: Select flashlight icon launch **Search and Select: Media Object** page.
3. Select media object in **Search and Select: Media Object** page.

4. Back in **Update Product: Content** page, selected media object displays next to content component.
5. Press **Apply** to save changes.
6. Optionally:
  - Select **Create Media Object icon** to create a new media object. See [Section 4.4.1, "Creating Media Objects"](#). After creating the media object, assign content source file to media object, if desired, directly from Product > Content page.
  - Select **Show Details** to show the content store/language mappings and to add content items.  
In **Show** mode, you can:
    - Select **View Mapping** to view store/language mappings for content associated to media object. If no store/language mappings exist, button is de-active.
    - Select **Add Content** to add content item to media object; see [Section 4.4.2, "Assigning Content Items to Media Objects"](#).
7. If you have not already done so, map a content source file to the media object. See [Section 4.4.2, "Assigning Content Items to Media Objects"](#).

### 4.3.5 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.

For a complete list of product Display Templates, see the *Oracle iStore Implementation and Administration Guide*, Implementing Customer UI Catalog chapter.

#### Steps

1. Log in to the Store Administration UI and navigate to **Catalog > Products**. Select product and press **Update** to retrieve the **Update Product: Details** page.
2. Select **Display Template** to retrieve the **Update Product: Display Template** page.
3. In the **Select a Display Template for this product** LOV, select the **Select a Display Template** option.
4. Seeded product Display Templates will display in the gallery on the page. Select the radio button of the desired template.

5. Press **Apply** to save changes.

### 4.3.6 Searching for Products

Use the following procedure to search in the Oracle iStore **Products** pages for Oracle Inventory items.

#### Simple Search

1. Log into the Store Administration UI and navigate to **Catalog > Products**.
2. Select either **Product Name**, **Product Number**, or **Category** from the **Search** LOV.
3. Enter your search criteria in the **Search** textbox, using full or partial values. Use the percent sign (%) as a wildcard if desired. Search is case insensitive.
4. Select **Enter** or **Go** to launch search.

#### Advanced Search

1. Log into the Store Administration UI and navigate to **Catalog > Products**.
2. Select **Advanced Search**.
3. Enter in the search textboxes the search criteria. Use the percent sign (%) as a wildcard if desired. Search is case insensitive. 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 store in which the product is included
  - **Start Date** — Select product creation date
  - **End Date** — Select product creation end date
4. Select **Go** to launch search.

## 4.4 Content and Display Templates Quick Steps

Topics in this section include:

- [Section 4.4.1, "Creating Media Objects"](#)
- [Section 4.4.2, "Assigning Content Items to Media Objects"](#)
- [Section 4.4.3, "Uploading Source Files to Content Repository"](#)
- [Section 4.4.4, "Mapping Source Files to Display Templates"](#)

For more information, see the *Implementing Customer UI Display* chapter and the *Advanced Display* appendix of the *Oracle iStore Implementation and Administration Guide*.

## 4.4.1 Creating Media Objects

Use the following procedure to create a media object.

### 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 4–4 Create Media Object Icon**



2. In the **Create Media Object** page, enter:
  - **Media Object 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.

- **Keywords** --- Enter keywords if desired, separated by commas; saved keywords can be searched in media object search utility
  - **Description** --- Enter description if desired; will not appear in Customer UI
  - **Class** --- Select a class for the media object, based on its display purpose
3. Press **Apply** to save changes.

## 4.4.2 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 navigate to **Content > Media Objects**.
2. Select **Update** icon in Media Objects page to retrieve the **Update Media Object** page.
3. Select **Add Content** 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 flashlight icon 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.

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.

6. **Map to store:** In **Add Content** page, in **Source File Mapping** area, select Store that this source file should be mapped to. To map the content to all stores and all languages, select **All**.
7. Once store is selected, use **Language** LOV to select language for source file.
8. Press **Apply** to save changes.
9. Optionally, select the **View Mapping** button to retrieve a list of store-language mappings for the media object.

### 4.4.3 Uploading Source Files to Content Repository

The 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.

Use the following procedure to upload files to the Content Repository. To update or replace existing source files, see [Section 4.4.3.1, "Updating/Replacing Source Files"](#).

#### Steps

1. Log in to the Store Administration UI and select **Content > Content Repository**. The **Content Repository** page shows all content items available in the content repository.
2. Select **Upload Source File** to retrieve the **Upload Source File** page.
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 `jtfdload`.
5. Select **Upload File** to save the changes. The file is now uploaded to the Content Repository, and can be mapped to media objects.

#### 4.4.3.1 Updating/Replacing Source Files

Use the following procedure to replace/update a source file in the Content Repository.

### Steps

1. Log in to the Store Administration UI and navigate to **Content > Content Repository**. The **Content Repository** page shows all content items available in the content repository.
2. Select **Update** icon to retrieve the **Update Source File** page.
3. Use **Browse** button to browse file system; select file using your operating system's conventions for selecting a file.
4. Optionally, select the **Secured** checkbox to apply security to the attachment.
5. Select **Apply**.

## 4.4.4 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.
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.

## 4.5 Reports Quick Steps

Summarized information about the reports can be found in [Section 2.5, "Business and Operational Reports"](#), within this guide.

This section's topics include:

- [Section 4.5.1, "Retrieving Discoverer Reports"](#)
- [Section 4.5.2, "Setting Bin Preferences"](#)
- [Section 4.5.3, "Setting up E-mail Delivery for Reports"](#)

For complete reports information, see the *Oracle iStore Implementation and Administration Guide*, Implementing Reports chapter. Reports troubleshooting information can be found in the Troubleshooting and Diagnostics chapter of the implementation/administration guide.

### 4.5.1 Retrieving Discoverer Reports

Use the following procedure to retrieve Oracle Discoverer reports from the Store Administration UI.

#### Steps

1. Log into the Store Administration UI and select **Reports > Discoverer Reports**.
2. Select **Business Reports** or **Operational Reports**.
3. In the table that appears, select the hyperlink of the report name.
4. In the input parameters screen, select the desired parameters.
5. Select the **Apply Parameters** button to retrieve the report. The reports outputs may take several seconds to appear.

### 4.5.2 Setting Bin Preferences

Use bin preferences to configure bin display. 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.

For step-by-step instructions on how to access the preferences screens, see [Section 4.5.2.3, "Steps to Set Bin Preferences"](#).

You set bin preferences for the business reporting bins differently than for the operational reporting bins. For instructions, see:

- [Section 4.5.2.1, "Setting Preferences for Business Bins"](#)
- [Section 4.5.2.2, "Setting Preferences for Operational Reports"](#)

#### 4.5.2.1 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 4.5.2.3, "Steps to Set Bin Preferences"](#).
- For a list of business reports, see [Section 2.5.2, "Business Reports"](#).

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.

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 *Oracle iStore Implementation and Administration Guide*, Implementing Reports chapter, for additional details.

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.

#### 4.5.2.2 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 4.5.2.3, "Steps to Set Bin Preferences"](#).
- For a list of operational reports, see [Section 2.5.3, "Operational Reports"](#).

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.

### 4.5.2.3 Steps to Set Bin Preferences

Use the following procedure to set bin preferences.

#### Steps

1. Log into 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 4.5.2.1, "Setting Preferences for Business Bins"](#)
  - [Section 4.5.2.2, "Setting Preferences for Operational Reports"](#)

## 4.5.3 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

Use the following procedure to designate the recipients of the e-mail reports.

#### Steps

1. Log in to the Store Administration UI and select **Reports > Email Reports**. 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.



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