

Oracle® iStore

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Oracle iStore Implementation and Administration Guide, Release 11i

Part No. B13549-01

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Preface

Welcome to the *Oracle iStore Implementation and Administration Guide*, Release 11i.

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

The *Oracle iStore Implementation and Administration Guide* contains the information you need to understand and use Oracle iStore. This guide contains the following chapters and appendices:

- [Chapter 1, "Introduction"](#), provides an introduction to Oracle iStore and brief descriptions of its features, architecture, and technology.
- [Chapter 2, "Verify Mandatory Dependencies"](#), summarizes Oracle iStore's application dependencies.
- [Chapter 3, "Implementation Overview"](#), provides an overview of the Oracle iStore implementation process and its tasks.

- [Chapter 4, "Implementation Tasks for Oracle iStore"](#), details the required implementation tasks for Oracle iStore.
- [Chapter 5, "Implementing Site Management"](#), contains concepts surrounding managing sites and detailed steps how to set up sites.
- [Chapter 6, "Implementing Initial Customer UI Pages"](#), contains configuration details for the initial landing pages in your sites.
- [Chapter 7, "Implementing Products"](#), contains information for implementing products in Oracle iStore.
- [Chapter 8, "Implementing the Catalog"](#), contains information on how to set up and configure the online catalog.
- [Chapter 9, "Implementing Content"](#), provides details on altering the basic display of your online specialty sites.
- [Chapter 10, "Implementing Pricing"](#), describes how to implement pricing for sites.
- [Chapter 11, "Implementing Payment Types and Shipping Methods"](#), details how to set up site payment types and shipping methods for the sites.
- [Chapter 12, "Implementing Carts and Orders"](#), describes concepts and steps to implement and configure Oracle iStore shopping carts and lists, order placement, order tracking, and customer contact information functionality
- [Chapter 13, "Implementing User Management"](#), contains information on setting up your customer end users, including information about registration and user security.
- [Chapter 14, "Implementing Customer Assistance"](#), provides implementation details for the customer assistance features of Oracle iStore.
- [Chapter 15, "Implementing Messages and Prompts"](#), details how to configure the messages and prompts that display in the specialty sites.
- [Chapter 16, "Implementing Reports"](#), contains information on how to implement and use the reports functionality of Oracle iStore.
- [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#), provides considerations and guidelines for running your sites in a global scenario.
- [Chapter 18, "Implementing Performance and SSL"](#), describes how to implement Oracle iStore's web cache and SSL elements.

- [Chapter 19, "Verifying the Implementation"](#), describes tasks for verification of an Oracle iStore implementation.
- [Chapter 20, "Diagnostics and Troubleshooting"](#), provides tips for troubleshooting Oracle iStore implementation, use, and administration.
- [Chapter 21, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#), describes the integration of Oracle iStore with Oracle Advanced Supply Chain Planning.
- [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#), describes the integration of Oracle iStore with Oracle Bills of Material.
- [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#), describes the integration of Oracle iStore with Oracle Configurator.
- [Chapter 24, "Integrating Oracle iStore with Oracle Content Manager"](#), describes the integration of Oracle iStore with Oracle Content Manager.
- [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#), describes the integration of Oracle iStore with Oracle iSupport.
- [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#), describes the integration of Oracle iStore with Oracle Marketing.
- [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#), describes the integration of Oracle iStore with Oracle Partner Management.
- [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), describes Oracle iStore's integration with Oracle Quoting.
- [Chapter 29, "Integrating Oracle iStore with Oracle Sales Applications"](#), describes Oracle iStore's integration with Oracle Sales Applications.
- [Chapter 30, "Integrating Oracle iStore with Oracle Sales Contracts"](#), describes the integration of Oracle iStore with Oracle Sales Contracts to provide Terms and Conditions functionality.
- [Chapter 31, "Integrating Oracle iStore with Oracle Shipping Execution"](#), describes the integration of Oracle iStore with Oracle Shipping Execution.
- [Chapter 32, "Integrating Oracle iStore with Oracle Single Sign-On"](#), describes how to implement Oracle iStore with Oracle Single Sign-On.
- [Chapter 33, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), describes the integration of Oracle iStore with Oracle9iAS Web Cache.
- [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), describes the integration of Oracle iStore with Oracle Workflow.

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

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 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/>

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

Accessibility of Links to External Web Sites in Documentation

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

Other Information Sources

You can choose from many sources of information, including 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).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11*i* Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on *OracleMetaLink*.

Related Guides

Oracle iStore shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle iStore.

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

Note: For document titles related to specific integrating applications, please see the relevant chapters in this guide.

Oracle Applications CRM System Administrator's Guide

This guide explains the setup and usage of Oracle CRM System Administrator Console that Oracle iStore uses.

Oracle Common Application Components User Guide

This guide describes the usage of Oracle CRM Application Foundation.

Oracle iStore API Reference Guide

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

Oracle iStore Quick Reference Guide

This guide provides overviews of the features and functionality of Oracle iStore.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle 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 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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

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.

Oracle Alert User’s Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle iReceivables implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide 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 *OracleMetaLink*.

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle iReceivables and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 iReceivables 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 Oracle 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 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.

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Oracle Corporation

500 Oracle Parkway

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Introduction

This chapter provides an introduction to Oracle iStore 11*i* and briefly discusses the new features of this release.

Main topics in this chapter include:

- [Section 1.1, "Oracle iStore Overview"](#)
- [Section 1.2, "New in this Release"](#)
- [Section 1.3, "Obsolete in this Release"](#)

1.1 Oracle iStore Overview

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-based sites 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
- Provide a full range of online purchasing capabilities, including flexible pricing, sales assistance, storage of customer data, shared carts, shopping lists, warranties, order tracking and returns, and more
- Deploy sites in business partner, business-to-business (B2B) and business-to-consumer (B2C) scenarios
- Target different customer segments and/or organizations

- Capture and track customer information and activities
- View reports about the activities in the online stores

In addition, organizations can build integrated sites which support users of Oracle iSupport and Oracle Partner Management applications.

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

- [Section 1.1.1, "Site Administration User Interface"](#)
- [Section 1.1.2, "Catalog Management"](#)
- [Section 1.1.3, "Content Management"](#)
- [Section 1.1.4, "Site Reporting"](#)
- [Section 1.1.5, "Automated User Communications"](#)
- [Section 1.1.6, "Background Data Management"](#)
- [Section 1.1.7, "User Management, Self-Service Registration, and Customer Information"](#)
- [Section 1.1.8, "Globalization and Localization Support"](#)
- [Section 1.1.9, "Interactive Selling and Ordering Options"](#)
- [Section 1.1.10, "Order Management and Fulfillment"](#)
- [Section 1.1.11, "Marketing and Customer Tracking"](#)
- [Section 1.1.12, "Business Objects, Components, and Processes"](#)

1.1.1 Site Administration User Interface

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

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

- Create and maintain of any number of sites
- Easily duplicate sites, catalogs, and content
- In Preview mode, immediately preview the sites
- Configure the display order of site names as they are presented in the Customer UI

- Utilize powerful search utilities built into each main page
- Target different customer segments with different sites and catalogs
- Support globalization features, such as multiple languages and currencies
- Brand each site differently
- Provide different content for the same product on different sites
- Enable different payment and shipping methods for each site
- Set different price lists on each site for each user type (guest, B2C, B2B)
- Set attributes at the site level (such as allowing guest users, allowing ATP checks, etc.)
- Restrict sites via user responsibilities
- Set organization-level access controls
- View site reports

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

- Name
- Product catalog
- Section hierarchy
- Target users
- Currency
- Language
- Price lists
- Payment types
- Payment type thresholds
- Shipping methods
- Access restrictions
- Product and section exclusion rules
- Effective dates

Site creation is covered in [Section 5.2, "Creating Sites"](#).

1.1.2 Catalog Management

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

- A section (catalog) 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 sites that contain the product.
- Product search can support both Section Search and Category Search.
- Optional integration with Oracle interMedia allows you to set up a powerful product search in the specialty sites.
- A Display Template gallery which lets you quickly pick, in WYSIWYG fashion, the layout of individual or groups of sections and products.
- Configurable bins to which you can map your own JSPs and position along the sides, tops, and bottoms of catalog, shopping cart, and user registration pages. Several of the bins are pre-seeded with content.
- The ability to construct targeted catalogs accessible to segments of customers.
- The ability to exclude catalog portions from specific sites.
- Product autoplacement feature which allows the populating of sections with products through a single concurrent program.
- Support for several product types, including serviceable items, configured items, and model bundles.
- Flexible pricing support, including promotional goods modifiers and sites as pricing qualifiers.

- Optional integration with Oracle Marketing allows you to create and maintain Inventory products, product templates, and several other product parameters.

For more information, see [Chapter 8, "Implementing the Catalog"](#).

1.1.3 Content Management

Oracle iStore's Content Repository and reusable content components allow you to store, easily retrieve, and configure content to display in your sites. Highlights include:

- Hundreds of configurable Display Templates present the Customer UI. This rich catalog display environment presents a multitude of possibilities for mapping content files to alter the look and feel of the specialty sites.
- 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.
- Framework for reusing a single source file in any number of site catalog pages.
- Ability to map content to specific sites and languages combinations.
- Easily update files which display in the specialty sites.
- Optional integration with Oracle Content Manager to provide content item creation, versioning, approvals, and a translation interface.

For more information, see [Chapter 8, "Implementing the Catalog"](#), and [Chapter 9, "Implementing Content"](#).

1.1.4 Site Reporting

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

- Business Reports and Bins present the following data:
 - Number of orders placed for a given time period
 - The types of users making purchases and the top customers
 - Top product sales for specific time periods

- Number of shopping carts converted to orders
- Operational Reports and Bins present the following data:
 - Product assignment and published/unpublished status reports
 - Section assignment and published/unpublished status reports

For more information, see [Chapter 16, "Implementing Reports"](#).

1.1.5 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
- Sales assistance requests

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

This functionality is provided through Oracle iStore's integration with Oracle Workflow. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for more information.

1.1.6 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 sites

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

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

Oracle iStore offers a full user registration and management framework in the Customer UI. For organizational users, seeded roles let you offer personalized features for different customer segments and business partners. Automatic user registration enables self-service access to the sites. 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.
- Support for customers integrated with Oracle iSupport and Oracle Partner Management.
- Business-to-Consumer (B2C) functionality allows you to quickly launch an online presence to the buying public.
- Supplied integration with Oracle's customer data storage model, the Trading Community Architecture (TCA), provides the ability to maintain customer information and complex party relationships.
- Address Book and Payment Book functionality in the Customer UI allows users to maintain their own data.
- Ability to mandate the entry of B2B user contact information.
- Optional integration with Oracle Quoting allows interactive selling and online user assistance.

See [Chapter 13, "Implementing User Management"](#), and [Chapter 12, "Implementing Carts and Orders"](#), for more information.

1.1.8 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 sites --- with targeted products and prices --- in any country.
- The globally-oriented Site Selection Page is the default landing page for the Customer UI. It displays all sites 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 site has been set up.
- E-mail notification messages leveraging Oracle Workflow can be provided in all languages, and configured by organization, user type, and site.

See [Chapter 6, "Implementing Initial Customer UI Pages"](#), and [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#), for more information.

1.1.9 Interactive Selling and Ordering Options

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

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

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

Note that some of these features require integration with other Oracle applications. For more information, see [Chapter 10, "Implementing Pricing"](#), [Chapter 12, "Implementing Carts and Orders"](#), [Chapter 14, "Implementing Customer Assistance"](#), and other chapters which detail integrating with Oracle iStore.

1.1.10 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
- Shipping and shipment tracking capabilities through Oracle Shipping
- Online automated payment processing through integration with Oracle Order Capture
- Order cancellation abilities
- Order returns
- Optional integration with Oracle Financial applications can provide accounting support
- Order tracking, including the ability to view invoice, shipping, and payment details
- Published quotes, sales assistance and Terms and Conditions fully integrated with Oracle Quoting

For more information, see [Chapter 11, "Implementing Payment Types and Shipping Methods"](#), and [Chapter 12, "Implementing Carts and Orders"](#).

1.1.11 Marketing and Customer Tracking

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

- Lead import functionality which allows the capture of valuable customer information from Oracle iStore shopping carts. Oracle Sales applications then can use the data in marketing efforts. See [Chapter 29, "Integrating Oracle iStore with Oracle Sales Applications"](#), for more information.
- Ability to post advertisements into Oracle iStore Customer UI bins, an option which leverages integration with Oracle Marketing.
- Personalized customer event tracking through the optional Oracle Marketing integration. See [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.
- Ability to create deep link advertisements to the Customer UI in other web pages -- see [Section D.6, "Deep Linking Support"](#), for details.

1.1.12 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 sites.
- **Oracle BLAF** --- Both the Site 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.

1.2 New in this Release

This section contains information on what is new in Oracle iStore 11i Release 11.5.10.

Read-me information for this release can be found in the associated About Doc publication available on Oracle*MetaLink*. To use MetaLink, register at <http://metalink.oracle.com>.

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult Oracle*MetaLink* for relevant product patches and documentation.

See also: [Section 1.3, "Obsolete in this Release"](#)

New in this Release main features include:

- [Section 1.2.1, "Extensible Self-Service Framework"](#)
- [Section 1.2.2, "Single Sign-on \(SSO\) Support"](#)
- [Section 1.2.3, "Display Template Mappings Import/Export"](#)
- [Section 1.2.4, "E-Mail Notifications Enhancements"](#)
- [Section 1.2.5, "Direct Item Entry Enhancements"](#)
- [Section 1.2.6, "Configurator Usage Support"](#)
- [Section 1.2.7, "Enhanced Collaborative Purchasing"](#)
- [Section 1.2.8, "User Access Control Improvements"](#)
- [Section 1.2.9, "Order Tracker Enhancements"](#)
- [Section 1.2.10, "Ability to Submit Returns"](#)
- [Section 1.2.11, "Support for Selling Serviceable Items with Services"](#)
- [Section 1.2.12, "Pricing and Promotion Improvements"](#)
- [Section 1.2.13, "Enhanced Oracle Personalization Integration"](#)
- [Section 1.2.14, "Enhanced Descriptive Flexfield Support"](#)
- [Section 1.2.15, "Oracle Quoting Integration Enhancements"](#)
- [Section 1.2.16, "Improved Terms and Conditions Functionality"](#)
- [Section 1.2.17, "Performance Enhancements"](#)

- [Section 1.2.18, "Accessibility Compliance"](#)

1.2.1 Extensible Self-Service Framework

Oracle iStore's new, extensible self-service framework allows you to build fully integrated e-business sites that support end-users and functionality of Oracle iStore, Oracle Partner Management, and Oracle iSupport. The main features of the self-service framework include:

- [Section 1.2.1.1, "Site Management Framework"](#)
- [Section 1.2.1.2, "Self-Service End-User Administration"](#)
- [Section 1.2.1.3, "Integrated Partner Portal"](#)
- [Section 1.2.1.4, "Integrated Support Portal"](#)
- [Section 1.2.1.5, "Dynamic Layout and Component Mapping"](#)
- [Section 1.2.1.6, "Enhanced Post Sales Support"](#)

1.2.1.1 Site Management Framework

This release contains a more robust and configurable site construction interface in the Site Administration application. Enhancements include:

- One or more sites can target different audiences: Store sites, Support sites, and Partner sites are supported as logical groups for the Site Selection Page and for supplied navigation bins. Plus, Oracle iStore's flexible and extensible framework allows you mix support, store and partner functionality in one or more sites -- or mix any combination in one site.
- Site administrators can functionally categorize sites by group. Groups and their related sites are then selectable from the Site Selection Page in the Customer UI. Custom groups can be supported.
- Implementers can construct specialty sites that offer fully integrated access to Oracle iSupport and Oracle Partner Management applications and users through a common dashboard in the Customer UI.
- More Display Templates are provided which support Site Management in the Customer UI, including bins that you can map to specific sections, the shopping cart, or registration screens.
- Supplied bin templates for specialty site pages which link to Oracle iSupport and Oracle Partner Management applications.

See [Chapter 5, "Implementing Site Management"](#), for more information.

1.2.1.2 Self-Service End-User Administration

A new, highly configurable user management framework leverages Oracle CRM Technology Stack and Oracle iStore framework. Included are:

- Easier and more flexible self-service registration and administration of users
- B2C, B2B and Partner registration support, including supplied user registration pages and related flows
- Seeded, configurable Oracle CRM user type definitions, allowing automatic assignment of responsibilities and roles to B2B, B2C, and Partner users
- New user permissions controlling many aspects of the end-user experience, including granular permissions for Profile management, user management, sales assistance requests, viewing list prices versus discount prices, and ability to initiate check out
- Support for Oracle CRM user management Workflow notifications
- Unified user Profile pages across sites
- Easy switching between multiple accounts for B2B users, allowing users to select a specific account to link to an order
- Ability by a company administrators (primary users) to:
 - Manage company contacts
 - Assign/revoke site access for other users
 - Assign/revoke roles for other users
 - Assign/revoke accounts for other users
 - Approve/reject registrations of other users
 - Add comments while approving/rejecting registration requests
 - Manage company information (for example, web site address and annual revenue) that is displayed as view-only to non-administrative users
- Uptake of Oracle E-Business Suite password security features, including:
 - Password syntax checks
 - Ability to force users to select a new password during the first-time login
- Ability to offer customized user Profile pages

See [Chapter 13, "Implementing User Management"](#), for additional details.

1.2.1.3 Integrated Partner Portal

This release features full integration with Oracle Partner Management, allowing implementers to set up Partner portals within the Oracle iStore customer pages. Included is the ability to:

- Link to the Partner application from Oracle iStore's Customer UI
- Offer partners collaborative purchasing through Oracle iStore's Share Cart feature
- Build Partner sites from which users can access both Oracle iStore specialty sites and Oracle Partner Management functionality
- Offer partner registration, information, and enrollments through the web sites, while at the same time giving partners access to a full web ordering system
- Maintain user registration, user management, and storage of user information in self-service mode

See [Section 27.2, "Oracle iStore-Oracle Partner Management Integration Overview"](#), for additional details.

1.2.1.4 Integrated Support Portal

Oracle iStore Release 11.5.10 also includes full integration with Oracle iSupport and its customer support system. Implementers can:

- Offer customer support sites alongside a product catalog, all completely integrated into the order management system
- Let Oracle iSupport customer users access service requests, knowledge base, and forums from the external Oracle iStore web pages
- Maintain user registration, user management, and storage of user information in self-service mode

See [Section 25.3, "Integrating Oracle iSupport with Oracle iStore Site Management"](#), for more information.

1.2.1.5 Dynamic Layout and Component Mapping

The section building tool in the Site Administration application now features the ability to select Fixed or Configurable Layout for sections (previously, only Fixed Layout was available). Using Configurable Layout, component templates (bins) can be mapped dynamically for a specific section, with the option to cascade mappings to child sections.

See [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#), and [Section 8.10.5, "Using Configurable Bin Layout"](#), for more information.

1.2.1.6 Enhanced Post Sales Support

Implementers of Oracle iStore Release 11.5.10 receive a greatly enhanced Oracle iStore post sales support system, including the ability to submit returns.

See [Section 1.2.9, "Order Tracker Enhancements"](#), for more information.

1.2.2 Single Sign-on (SSO) Support

Oracle iStore now supports integrating its sites with the Oracle Single Sign-on (SSO) Server to provide single-authentication architecture.

See [Section 32.2, "Single Sign-On Functionality with Oracle iStore"](#), for more information.

1.2.3 Display Template Mappings Import/Export

The new template mappings import/export concurrent programs provide reduced maintenance costs by allowing Display Template source file and site-language template mappings to be exporting, altered offline, and then uploaded to any instance.

See [Section D.3, "Display Template Mappings Import and Export"](#), for details.

1.2.4 E-Mail Notifications Enhancements

In this release, Oracle iStore supports sending Oracle Workflow notifications in HTML format. Oracle iStore supplies the text-message formats. Now, you can also enable HTML notifications at the workflow level, based on your business requirements. In the Site Administration UI, after setup, you can select the HTML messages retrieved from Workflow, and map these to organization, user type, or site.

As part of the new user registration framework, Oracle iStore supports the sending of Oracle CRM Technology Foundation user management e-mail notifications as well.

See [Section 34.2.2, "Oracle iStore Seeded Notifications"](#), for more information.

1.2.5 Direct Item Entry Enhancements

Several Direct Item Entry enhancements have been made, including bulk upload of products into the Direct Item Entry form and improved error reporting.

See [Section 12.2, "Direct Item Entry"](#), for more information.

1.2.6 Configurator Usage Support

Oracle iStore now provides Oracle Configurator usage support, allowing merchants to provide different configurator user interfaces for different user segments.

See [Section 23.3.5, "Configurator Usage Support"](#), for details.

1.2.7 Enhanced Collaborative Purchasing

This release brings multiple enhancements to the collaborative Share Cart feature in the Customer UI, including:

- Ability to re-share carts and quotes
- New roles (administrators, participants, viewers) which lend different member permissions
- Ability to add comments when sharing or updating; comments are included in the e-mail notifications
- Ability to selectively notify users via e-mail of sharing or updates
- A new update ability for shared quotes

See [Section 12.3, "Shopping Cart Sharing"](#), for more information.

1.2.8 User Access Control Improvements

Several new user access control enhancements are available in the form of new and updated B2B user permissions controlling checkout, order placement, sales assistance, returns, and view discount/list price abilities. In addition, with the new site management enhancements, numerous new permissions allow flexible control in the Profile pages of users of Oracle iStore, Oracle iSupport, and Oracle Partner Management, if integrated. This release includes a new automated script which adds the new user permissions to existing Oracle iStore roles.

See [Appendix C, "Seeded User Data"](#), for more information.

1.2.9 Order Tracker Enhancements

Many new Order Tracker enhancements have been made in the Customer UI, including:

- Easier-to-read display of configured items
- Enhanced search capabilities
- Improved shipment tracking display, including viewing shipment details at order and item levels
- Single icon for showing user-entered shipping and billing information
- Ability to change the display length of order summary columns, including new documentation on how to change the attributes of several fields
- View order lines being shipped and fulfilled

See [Section 12.6, "Order Tracking"](#), for details.

1.2.10 Ability to Submit Returns

Oracle iStore now offers support for return orders in the Customer UI. Included are:

- A new Returns tab and related pages in Order Tracker
- New search screens, including serial number search
- Ability for users to submit returns for single orders or across multiple orders
- Ability for implementers to disable the functionality by site or user responsibility
- A new user permission in the seeded B2B user roles allows companies to disable the functionality for specific B2B users, while another user permission allows B2B users to view returns across the organization

See [Section 12.8, "Order Returns"](#), for more information.

1.2.11 Support for Selling Serviceable Items with Services

Support for serviceable items and related services (e.g., extended warranties) is now available in the Customer UI. New templates for this functionality are supplied with this release. Included in this enhancement is API-level support for referencing Oracle Install Base items with services.

See [Section 7.8, "Support for Service Items"](#), for details.

1.2.12 Pricing and Promotion Improvements

This release brings multiple pricing and promotion enhancements, including:

- Multi-currency price list support
- Ability to use specialty sites as pricing qualifiers
- Promotional goods support

See [Section 10.2.1, "Multiple-Currency Price Lists"](#), [Section 10.3.2, "Oracle iStore Site as Pricing Qualifier"](#), and [Section 10.4.1, "Promotional Goods Modifiers"](#), for details.

1.2.13 Enhanced Oracle Personalization Integration

Enhanced Oracle Personalization integration in the form of additional personalization abilities allows merchants discover, record, and analyze customer web browsing and web purchasing behavior, as well as push personalized recommendations at the time of the customer web interaction based on the knowledge gained through the previous interactions.

See [Section 26.8, "Using Oracle Marketing for Personalization in the Customer UI"](#), for more information.

1.2.14 Enhanced Descriptive Flexfield Support

In this release, Oracle iStore's support for Oracle Applications descriptive flexfields (DFFs) support has been greatly enhanced, allowing you to capture additional information from users in the shopping cart and payment pages.

See [Section D.2, "Descriptive Flexfield Support"](#), for details.

1.2.15 Oracle Quoting Integration Enhancements

Oracle iStore has improved its close integration with Oracle Quoting, including:

- Ability for users to update quotes, controllable by a profile option
- API-level validation of site parameters, such as shipping and payment methods

See [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#), and [Section 28.3.2, "API-Level Validation of Site Settings"](#), for more information.

1.2.16 Improved Terms and Conditions Functionality

The Terms and Conditions (T&Cs) functionality available through the Customer UI has been overhauled and greatly improved. While still leveraging the Oracle Sales Contracts module as in previous releases, the functionality is now a fully integrated part of the powerful Oracle Order Management application suite. With this release, you can configure default contract templates through Oracle Quoting and allow sales representatives to modify T&Cs on-the-fly. Additionally, the T&Cs are viewable in HTML format.

See [Section 30.2, "Using Terms and Conditions"](#), for details.

1.2.17 Performance Enhancements

The following performance enhancements have been made for the Customer UI:

- [Section 1.2.17.1, "Oracle 9iAS Web Cache Integration Enhancements"](#)
- [Section 1.2.17.2, "Search Performance Enhancements"](#)

1.2.17.1 Oracle 9iAS Web Cache Integration Enhancements

Enhancements in the Oracle 9iAS Web Cache integration include:

- **Support for Partial Web Cache** --- Oracle iStore supports using Partial Web Cache to dynamically cache parts of catalog pages. New documentation is provided in support of this feature, describing in detail how to set up Partial Web Cache with customized pages. See [Section 33.4, "Partial Web Cache"](#), for details.
- **Dynamic Page Cacheability for Configurable Layout** --- Prior to Oracle iStore Release 11.5.10, the cacheability settings for specialty site pages could only be defined during setup. In this release, when using Configurable Layout for bins, you can change page cacheability at runtime. See [Section 33.5, "Dynamic Page Cacheability for Section Configurable Layout"](#), for more information.

1.2.17.2 Search Performance Enhancements

To improve performance across the Customer UI, Oracle iStore has removed the auto-query performed on all pages that allow searching by customers. Instead, Oracle iStore displays a default message when a search screen initially engages. Users can perform a search to retrieve some values.

With the new behavior, the percent (%) sign is automatically appended as a wildcard in the search mechanisms (this returns results where data criteria is 'starts

with' in addition to the wildcard). For 'contains' behavior, users should explicitly enter the leading wildcard. No search is allowed on 'ends with' logic.

Also as part of the performance enhancements, Oracle iStore also has removed table row range and page number indicators on all tables, but kept the Previous and Next links for navigation ease.

1.2.18 Accessibility Compliance

In this release, Oracle iStore meets the standards of Federal Law Section 508, Part 1194: Electronic and Information Technology Accessibility Standards.

1.3 Obsolete in this Release

Numerous profile options have been obsoleted in this release, due to enhancements in the product that render them unnecessary. The profile options include:

- IBE: Authorize Payment Offline During Normal Checkout
- IBE: Display Language List in Specialty Store Page
- IBE: Notification User Role
- IBE: Reject Terms and Conditions Flow
- IBE: Recalculate Price in Order Management
- IBE: Shopping Cart Frozen Price Duration Profile
- IBE: Use AOL Menu in Customer UI
- IBE: Use Workflow Features
- IBE: Use Business to Customer Features
- IBE: Use Business User Auto Approval

Verify Mandatory Dependencies

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

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

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

This chapter's main topics include:

- [Section 2.1, "Related Documentation"](#)
- [Section 2.2, "Dependencies and Integrations to Other Oracle Applications"](#)
- [Section 2.3, "Accessing the Applications"](#)
- [Section 2.4, "Install Software"](#)
- [Section 2.5, "Initial Installation Verification"](#)
- [Section 2.6, "Setting up Oracle Receivables"](#)
- [Section 2.7, "Setting up Oracle General Ledger"](#)
- [Section 2.8, "Setting up Oracle Human Resources"](#)
- [Section 2.9, "Setting up Oracle Inventory"](#)
- [Section 2.10, "Setting up Oracle Order Management"](#)
- [Section 2.11, "Setting up Oracle CRM Technology Foundation"](#)
- [Section 2.12, "Optional Integrations with Oracle iStore"](#)

2.1 Related Documentation

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

2.2 Dependencies and Integrations to Other Oracle Applications

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

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

2.2.0.1 Oracle iStore and Multiple Organizations

Information about multiple organizations (multi-org), specific to Oracle iStore, is contained in [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#). For Oracle Applications multi-org information, see *Multiple Organizations in Oracle Applications*, Part No. A81174-02.

2.2.1 Overview of Dependencies and Integrations

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

2.2.1.1 Mandatory Dependencies

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

Oracle iStore 11*i* mandatory dependencies are:

- Oracle CRM Technology Foundation
- Oracle Receivables
- Oracle General Ledger
- Oracle Human Resources

- Oracle Inventory
- Oracle Order Management
- Oracle Order Capture

Limited setup information about these products is contained in this chapter. Refer to the product-specific implementation and user manuals for complete information. A list of these guides can be found in the [Other Information Sources](#) section of the [Preface](#). See [Section 2.2.2, "Mandatory Dependency Implementation Steps"](#) for implementation steps.

2.2.1.2 Optional Integrations

Oracle applications that extend Oracle iStore's capabilities are considered optional integrations. Basic setup information is contained in this guide, but you will need to refer to the product-specific setup and user manuals for complete information. Setting up the optional modules is not required; however, if they are not set up, then the additional functionality provided by these modules will not be available.

See [Section 2.12, "Optional Integrations with Oracle iStore"](#), for a discussion of these applications.

2.2.2 Mandatory Dependency Implementation Steps

The following table, [Table 2–1, "Mandatory Dependencies Setup Steps"](#), provides a recommended sequence for beginning your implementation and setting up the Oracle iStore mandatory dependencies.

Table 2–1 Mandatory Dependencies Setup Steps

Step	Required	Reference
1. Install Software	Yes	Section 2.4, "Install Software"
2. Verify Underlying Technology Stack Installation	No	Section 2.5, "Initial Installation Verification"
3. Set up Oracle Receivables	Yes	Section 2.6, "Setting up Oracle Receivables"
4. Set up Oracle General Ledger	Yes	Section 2.7, "Setting up Oracle General Ledger"
5. Set up Oracle Human Resources	Yes	Section 2.8, "Setting up Oracle Human Resources"
6. Set up Oracle Inventory	Yes	Section 2.9, "Setting up Oracle Inventory"

Table 2–1 Mandatory Dependencies Setup Steps (Cont.)

Step	Required	Reference
7. Set up Oracle Order Management and Oracle Order Capture	Yes	Section 2.10, "Setting up Oracle Order Management"
8. Set up Oracle Pricing	Yes	Section 2.10.2, "Setting up Pricing"
9. Set up Oracle CRM Technology Foundation	Yes	Section 2.11, "Setting up Oracle CRM Technology Foundation"

2.3 Accessing the Applications

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

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

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

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

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

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

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

2.3.0.1 Accessing Oracle Forms

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

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

and selecting Apps Logon Links > VIS Logon through the Forms cartridge.

Once logged into Oracle Forms, you can select from a list of responsibilities which determine the functionality you are allowed to use.

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

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

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

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

- Username = sysadmin
- Password = sysadmin

2.3.0.3 Responsibilities and Oracle Applications

All Oracle applications use the concept of user responsibilities for basic user security and application mapping. The responsibility a user logs in with will determine the application (and hence, the menus) that appear. Each responsibility is mapped to a menu structure in Oracle Forms. For information on Oracle iStore responsibilities, see [Chapter 13, "Implementing User Management"](#), and [Appendix C, "Seeded User Data"](#).

2.4 Install Software

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

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

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

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

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

2.4.1 Multi-Language Setup (MLS)

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

To install more than one language, see the following:

- *Installing Oracle Applications, Release 11i*
- *Note 177183.1, Successfully Installing NLS/MLS in 11.5.x - The Definitive Guide*
- *Note 177837.1, NLS/MLS - Setup and Usage*
- *Doc. 73352.1, NLS/MLS Frequently Asked Questions*

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

Oracle iStore is fully supportive of MSL/NLS, providing you have followed the required steps to set up the additional languages.

Information on globalization and multiple organizations is contained in [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#).

2.5 Initial Installation Verification

Before proceeding with the implementation of Oracle iStore and its dependencies, you must verify that the installation and middle tier setups are correct. Verify the proper installation and configuration of the following components:

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

See *Installing Oracle Applications* for more information.

2.6 Setting up Oracle Receivables

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

- [Section 2.6.2, "Oracle Trading Community Architecture"](#), has more information on the TCA.

At a minimum, you need to perform the required Oracle Receivables setups, including tax options, address validation, and the sales tax Location flexfield structure, as described in the *Oracle Receivables User Guide*.

2.6.1 Setting up Country Address Formats

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

Note: Out-of-the-box, address validation is available only for U.S. addresses.

For the country, U.S., Oracle iStore uses the **fixed** U.S. address format. If flexible address formats are not set up for other countries, the default fixed address format is used for these as well. If flexible address formats are set up, the flexible address formats will be used.

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

2.6.2 Oracle Trading Community Architecture

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

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

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

2.7 Setting up Oracle General Ledger

Oracle General Ledger (GL) provides business unit information to Oracle iStore. You also set up currencies in GL.

- **Note:** If you are implementing Oracle iStore Reports, then you must create a single calendar with the periods types: Day, Week, Month, Quarter, and Year, in order for the Reports to work. **Or**, if you do not want to add all of these periods to the GL calendar, for reporting purposes you can create a separate calendar for iStore in GL with the required period types.

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

2.8 Setting up Oracle Human Resources

Oracle Human Resources Management System (HRMS) stores information related to your organization. Use HRMS to set up employees and bill-to and ship-to countries. See *Using Oracle HRMS - The Fundamentals* for more information.

2.9 Setting up Oracle Inventory

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

In addition, several Inventory flags need to be set in order for products to display in the Customer UI. See [Chapter 7, "Implementing Products"](#), for iStore-specific Inventory product setup details.

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

2.10 Setting up Oracle Order Management

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

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

- Set up payment and shipping options

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

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

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

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

2.10.1 Setting up Defaulting Rules

You can set up Oracle Order Management to default certain values (following rules you set up in Oracle Order Management), for several order attributes, if no values exist for these attributes when a cart is submitted as an order. Use the profile option, ASO: OM Defaulting, to enable or disable the defaulting. To set parameters for specific attributes, use the steps below.

Prerequisites

- The profile option, IBE: Default Payment Term, is blank at the iStore application level.
- The profile option, ASO: OM Defaulting, is Yes.

Steps

1. Log into Oracle Forms with Order Management Superuser Responsibility.
2. Navigate to Menu > Setup > Rules > Defaulting.
3. Query for:
 - Application: Oracle Order Management
 - Entity: Order Header
4. In the Attributes area: Find the desired attribute, select it, and select the Defaulting Rules button.
5. In the Defaulting Sourcing Rules window, you can add (or subtract) any source/value item for the attribute.

After modifying the values, be sure to run the Build Sourcing Rules concurrent program and bounce the middle-tier server. See [Section 2.10.1.1, "Supported Oracle Order Management Defaulting Values"](#), for a list of the defaulting parameters supported by Oracle iStore and Oracle Order Capture schema.

2.10.1.1 Supported Oracle Order Management Defaulting Values

The following are the defaulting values supported by Oracle iStore:

Cart (Header) Fields:

- invoice_to_org_id
- invoice_to_contact_id
- ship_to_org_id
- ship_to_contact_id
- request_date
- ship_from_org_id

Only if ASO: OM Defaulting = Y:

- shipping_instructions
- packing_instructions
- salesrep_id
- payment_term_id
- fob_code
- freight_terms_code
- shipment_priority_code
- agreement_id
- order_category_code
- accounting_rule_id
- invoicing_rule_id

Item (Line) Fields:

- invoice_to_org_id
- invoice_to_contact_id

- line_type_id
- price_list_id
- ship_to_org_id
- ship_to_contact_id
- request_date
- schedule_ship_date
- promise_date
- ship_from_org_id

Only if ASO: OM Defaulting = Y:

- shipping_instructions
- packing_instructions
- payment_term_id
- fob_code
- freight_terms_code
- shipment_priority_code
- agreement_id
- line_category_code
- accounting_rule_id
- invoicing_rule_id

2.10.2 Setting up Pricing

See [Chapter 10, "Implementing Pricing"](#), for instructions.

2.11 Setting up Oracle CRM Technology Foundation

Oracle CRM Technology Foundation provides the underlying technology stack for the Oracle HTML applications. You must implement Oracle CRM Technology Foundation as described in *Oracle Applications CRM System Administrator's Guide*.

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

1. Set up Host Configuration --- See [Section 2.11.1, "Host Configuration"](#)
2. Set up Cookie Properties --- See [Section 2.11.2, "Cookie Properties"](#)
3. Set up Look and Feel Property --- See [Section 2.11.3, "Setting Look and Feel JTF Property"](#)
4. Set up Component Caches --- See [Section 18.3.1, "Component Caches for Oracle iStore in JTT"](#)

2.11.1 Host Configuration

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

2.11.2 Cookie Properties

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

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

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

2.11.3 Setting Look and Feel JTF Property

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

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

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

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

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

Steps

The steps to set this property are:

1. Login as System Administrator to the Oracle E-Business Suite HTML Foundation login (JTF login).
2. Navigate to Settings > System > Advanced. The Advanced - Properties page appears.
3. To set the property at the JTF/JTT application level:
 - a. In the View droplist, select the Oracle CRM Technology Foundation application product code, JTF. (Press the Update button if necessary.)
 - b. In the list that appears, select the hyperlink of the property, LookAndFeel.cabo.
 - c. In the Key Details page, enter the following values:

Key field = LookAndFeel.cabo

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

Key field = LookAndFeel.cabo

Value (Sequence 0) field = true
 - d. Click the Update button to save the changes.
5. When you are finished making the changes, log out of the sysadmin console, and log in as the iStore Administrator.

The Cabo Look and Feel should function properly.

6. Also, make sure the following directories are globally writable:

- /OA_HTML/cabo/images/cache
- /OA_HTML/cabo/styles/cache

2.11.3.1 Adding IBE to the View Droplist

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

1. Navigate to Settings > System > Category. In the Property Category page, select the following:
 - **Application Name** droplist - select iStore
 - **Read/update** droplist - select Update
2. Select the Next button.
3. In the Permission Role Mapping page, move JTF_SYSTEM_ADMIN_ROLE from the Available Roles window to the Assigned Roles window.
4. Select the Update button to save the changes.

See the latest *Oracle Applications CRM System Administrator's Guide*, for more information. This guide is available on [OracleMetaLink](#).

2.12 Optional Integrations with Oracle iStore

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

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

- [Oracle iSupport](#)
- [Oracle Install Base](#)
- [Oracle Marketing](#)
- [Oracle Partner Management](#)
- [Oracle Quoting](#)
- [Oracle Sales Applications](#)
- [Oracle Shipping Execution](#)
- [Oracle Single Sign-On Server](#)
- [Oracle Workflow](#)
- [Oracle9iAS Web Cache](#)

2.12.1 Oracle Advanced Pricing

Use Oracle Advanced Pricing to set up customer discounts, sourcing rules, pricing qualifiers, and pricing modifiers. See [Chapter 10, "Implementing Pricing"](#), for details.

2.12.2 Oracle Advanced Supply Chain

Use Oracle Advanced Supply Chain (Global ATP Server) to provide product availability information. See [Chapter 21, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#), for details.

2.12.3 Oracle Bills of Material

Use Oracle Bills of Material to set up configurable items, model bundles, and items with standard warranties for sale in your sites. See [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#), for details.

2.12.4 Oracle Call Center Technology

Use the Oracle Call Center Technology (CCT) suite of applications to process call-me-back requests. See [Chapter 14, "Implementing Customer Assistance"](#), for more details.

2.12.5 Oracle Configurator

Use Oracle Configurator to enable customer configured products, provide guided selling, and perform some of the shopping cart validations. See [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#), for details.

2.12.6 Oracle Content Manager

Use Oracle Content Manager to provide a complete range of content item creation and management capabilities. See [Chapter 24, "Integrating Oracle iStore with Oracle Content Manager"](#), for details.

2.12.7 Oracle Contracts

Integrate with Oracle Service Contracts to support the selling of serviceable items and related services in the Customer UI. Integrate with Oracle Sales Contracts to provide Terms and Conditions functionality in the checkout pages of the Customer UI. See [Section 7.8, "Support for Service Items"](#), and [Chapter 30, "Integrating Oracle iStore with Oracle Sales Contracts"](#), for details.

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

2.12.9 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. Also integrate with Oracle iSupport to provide a unified Support dashboard for users of Oracle iStore and Oracle iSupport. See [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#), for details.

2.12.10 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. See *Oracle Install Base Implementation Guide* for details.

2.12.11 Oracle Marketing

Use Oracle Marketing to create and maintain products; define, execute, and manage marketing campaigns; and to track user events. See [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#), for details.

2.12.12 Oracle Partner Management

Use Oracle Partner Management to provide a unified Partner dashboard in the Oracle iStore Customer UI. See [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#), for details.

2.12.13 Oracle Quoting

Use Oracle Quoting to create quotes that can be published to Oracle iStore sites, to provide contracts setup for Terms and Conditions, to capture carts as quotes when users request sales assistance, and to share quotes with other users. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for details.

2.12.14 Oracle Sales Applications

Use Oracle Sales Online and Oracle TeleSales to import sales leads from Oracle iStore orders and expired shopping carts. For more information on the Lead Import functionality of Oracle iStore, see [Chapter 29, "Integrating Oracle iStore with Oracle Sales Applications"](#).

2.12.15 Oracle Shipping Execution

Use the Order Management module, Oracle Shipping Execution (SE), to calculate shipping charges, and to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing. The Oracle Shipping Execution module must be in place to enable post-order tracking and shipping detail views in Oracle iStore. See [Chapter 31, "Integrating Oracle iStore with Oracle Shipping Execution"](#), for details.

2.12.16 Oracle Single Sign-On Server

Use Oracle Single Sign-On Server to provide single-authentication architecture. See [Section 32.2, "Single Sign-On Functionality with Oracle iStore"](#), for more information.

2.12.17 Oracle Workflow

Use Oracle Workflow to send HTML e-mail notifications and confirmations to customers and sales representatives. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for details.

2.12.18 Oracle9iAS Web Cache

Use Oracle9iAS Web Cache to serve the non-transactional Oracle iStore content. See [Chapter 33, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), for details.

Implementation Overview

This chapter provides an overview of required and optional setups with Oracle iStore 11*i*, after you have verified your installation and dependencies in [Chapter 2, "Verify Mandatory Dependencies"](#).

Main topics in this chapter include:

- [Section 3.1, "Implementation Process Description"](#)
- [Section 3.2, "Required Implementation Tasks"](#)
- [Section 3.3, "Advanced Tasks and Optional Integrations"](#)

3.1 Implementation Process Description

Now that you have installed the mandatory dependencies to Oracle iStore, as described in [Chapter 2, "Verify Mandatory Dependencies"](#), you can begin setting up your sites.

The steps required are:

1. Set up the Site Administration UI.
2. Create a basic site.
3. Set up the Customer UI.
4. Test the site.

In addition to the required setup steps, you can customize and add functionality as desired by performing advanced setup tasks and by implementing other Oracle Applications modules that are optional integrations for Oracle iStore.

3.2 Required Implementation Tasks

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

Table 3–1 Required Implementation Tasks

Task	Reference
<i>Implement Mandatory Dependencies</i>	Chapter 2, "Verify Mandatory Dependencies"
1) Set up the Site Administration UI	Section 4.1, "Setting up the Site Administration UI"
2) Create Sites	Section 5.2, "Creating Sites"
3) Set up Customer UI	Section 4.2, "Setting up the Customer UI"
4) Test Site	Section 19.1.1, "Testing the Sites"

3.3 Advanced Tasks and Optional Integrations

After you have created a basic site, refer to later chapters for details of expanding your implementation. For a discussion of optional integrations, see [Section 2.12, "Optional Integrations with Oracle iStore"](#).

Implementation Tasks for Oracle iStore

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

Main topics in this chapter include:

- [Section 4.1, "Setting up the Site Administration UI"](#)
- [Section 4.2, "Setting up the Customer UI"](#)
- [Section 4.3, "Testing Sites"](#)
- [Section 4.4, "Additional Implementation Tasks"](#)

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

4.1 Setting up the Site Administration UI

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

Required tasks include:

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

4.1.1 Set Initial Profile Options

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

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

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

This section includes:

- [Section 4.1.1.1, "Set Oracle Applications CRM Profile Options"](#)
- [Section 4.1.1.2, "Set iStore Site Administration UI Profile Options"](#)
- [Section 4.1.1.3, "Set Multi-Org Profile Options"](#)

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

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

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

4.1.1.1 Set Oracle Applications CRM Profile Options

The following Oracle CRM Technology Foundation profile options must be set:

- `FND: Branding Size`
- `JTF_PROFILE_DEFAULT_APPLICATION`
- `JTF_PROFILE_DEFAULT_BLANK_ROWS`
- `JTF_PROFILE_DEFAULT_CSS`
- `JTF_PROFILE_DEFAULT_CURRENCY`
- `JTF_PROFILE_DEFAULT_NUM_ROWS`
- `JTF_PROFILE_DEFAULT_RESPONSIBILITY` (application level only)

See [Section A.3, "Oracle CRM Technology Foundation Profile Options"](#), for profile option descriptions and values.

4.1.1.2 Set iStore Site Administration UI Profile Options

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

- IBE: Category Set
- IBE: Item Validation Organization

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

4.1.1.3 Set Multi-Org Profile Options

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

See [Section 17.3, "Implementing Globalization with Oracle iStore"](#), and *Multiple Organizations in Oracle Applications*, Part No. A81174-02.

4.1.2 Set up Administrators

You must create a site administrator (referred to as store manager in previous releases) who will set up and test the sites in the Site Administration UI. See [Section 4.1.2.1, "Set up iStore Administrator"](#) for details.

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

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

This section includes:

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

When a user with the iStore Administrator responsibility logs in to the Oracle E-Business Suite HTML login page at: `http://<host>:<port>/OA_HTML/jtfllogin.jsp`, the Site Administration UI opens.

Both the iStore Administrator and iStore Concurrent Program responsibilities are supplied for Oracle iStore. Users with these responsibilities receive all the required menus and privileges to manage sites and run Oracle iStore concurrent programs.

The menu assigned to the iStore Administrator responsibility is named **iStore Merchant user root menu** (IBE_M_USER_ROOT).

4.1.2.1 Set up iStore Administrator

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

Steps

1. Log in to Oracle Forms with the System Administrator responsibility and select Security > User > Define. The Users window opens.
2. In the User Name field, enter the user name that the site manager will use to log in to the Oracle iStore Site Administration UI. An example is IBE_ADMIN.
3. In the Password field, enter the site administrator's password.
4. In the Responsibilities block, choose iStore Administrator (key = IBE_ADMINISTRATOR) from the Responsibility LOV. Save the user record.
5. Set the following profile options at the user level for this site administrator:
 - JTF_PROFILE_DEFAULT_APPLICATION
 - JTF_PROFILE_DEFAULT_RESPONSIBILITY

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

4.1.2.2 Set up Concurrent Program Administrator

Concurrent programs populate database tables with fresh information from Oracle Applications. This guide's concurrent program information is contained both within individual chapters and consolidated in [Appendix B, "Concurrent Programs"](#). You must either add the concurrent program responsibility to the iStore administrator created above, or create a new user with the concurrent programs responsibility. Both methods work --- which avenue you take depends upon your business needs.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility and select Security > User > Define. The Users window opens.
2. If you are creating a new user, then perform the following steps:

- a. In the User Name field, enter the user name that the concurrent program manager will use to log in to Oracle Forms.
 - b. In the Password field, enter the concurrent program manager's password.
3. If you are making an existing user the concurrent program manager, then perform the following steps:
 - a. Choose View > Find.
 - b. Search for the existing user, and select that user name.
4. In the Responsibilities block, choose iStore Concurrent Programs Responsibility from the Responsibility LOV. Save the user record.
5. Set the Concurrent Manager profile options listed in [Section A.4, "Concurrent Program Manager Profile Options"](#).

Important: Set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit. See [Section 17.3.3, "Set up Responsibilities"](#), for more information.

4.1.3 Launch the Site Administration UI

All site creation tasks are performed in the Site Administration UI. You can enter the Site Administration UI by logging in to: `http://<host>:<port>/OA_HTML/jtfllogin.jsp` with a user name that the system administrator has set up as an Oracle iStore site manager user account. See [Section 4.1.2, "Set up Administrators"](#) for more information on creating a site manager user account. Verify that cookies are enabled for your browser before accessing the Site Administration UI.

4.1.3.1 Accessing the iStore Administrator's Profile Pages

On any page of the Site Administration UI, the site administrator can select the Profile icon to access his Oracle CRM Technology Foundation user profile page. Use the Profile pages to update personal information and set preferences. See the *Oracle Applications CRM System Administrator's Guide* for more information.

4.1.3.2 Modifying Merchant Functions

If you need to modify the functions that the site manager can perform, follow these steps:

1. Create a new responsibility for the user in the Application Object Library (AOL) module. For the new responsibility, you can assign the default menu, iStore Merchant user root menu (IBE_M_USER_ROOT), and still remove access to some of the tabs ("functions" in AOL terminology), or you can create a new menu using the Oracle iStore functions. All Oracle iStore functions can be found by searching for IBE_M_ in the Form Functions window.
2. In order to complete the menu setup (when creating a new responsibility) and avoid receiving the message, "Sorry. You do not have the required responsibility to access this page", you should assign both the new responsibility and the seeded responsibility, iStore Administrator, to the new user.
3. Next, set the new responsibility as the default responsibility of the new user. Do this by setting the profile option, JTF_PROFILE_DEFAULT_RESPONSIBILITY at the user level.

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

4.2 Setting up the Customer UI

The Oracle iStore *Customer UI* refers to the web pages accessed by customers/users of your Internet sites from the initial landing page through checkout and order tracking.

User registration is enabled by default in your sites. For more information, see [Chapter 13, "Implementing User Management"](#).

The page that displays when customers initially approach your site is controlled by specific combinations of profile options. You do not need to change these profile options for users to access your sites. For information on customer landing page options, see [Chapter 6, "Implementing Initial Customer UI Pages"](#).

The basic setup for enabling the Customer UI includes:

- [Section 4.2.1, "Set up Guest User Access"](#)
- [Section 4.2.2, "Verify the Guest User Account"](#)
- [Section 4.2.3, "Set Mandatory Customer UI Profile Options"](#)

4.2.1 Set up Guest User Access

Setting up a guest user is required for the Customer UI to display. It also allows customers to browse your sites without registering (although you can disable guest user access at the site level). Anonymous users who visit your sites are then automatically logged in with the guest user name. If a guest user makes any changes, such as modifying the preferred language or currency, or adding items to the shopping cart, the changes are saved in the cookie so that anonymous users cannot see each other's changes. A user must register before he can place an order or view order details in Order Tracker.

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

See [Chapter 13, "Implementing User Management"](#), for more information.

4.2.1.1 Steps to Set up the Guest User

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

Steps

1. Log in to Oracle Forms with the System Administrator responsibility and select Security > User > Define. The Users window opens.
2. In the User Name field, enter a user name, such as IBEGUEST, by which a guest user will be automatically logged in to Oracle iStore. This name can be any name that you choose, of reasonable length.
3. In the Password field, enter a password for this user name.
4. In the Responsibilities block, choose the seeded Oracle iStore customer responsibility, IBE_CUSTOMER, from the Responsibility LOV.
5. Save your changes.
6. Set the following profile options at the user level for the guest user name:
 - JTF_PROFILE_DEFAULT_APPLICATION
 - JTF_PROFILE_DEFAULT_CURRENCY
 - JTF_PROFILE_DEFAULT_RESPONSIBILITY

See [Section A.3.3, "Foundation Profile Options for Guest User"](#), for profile option descriptions and values.

7. Set up this guest user account as the Oracle CRM Technology Foundation self-service user. See the *Oracle Common Application Components User Guide* for instructions.
8. Verify the guest user account, as described in the next section: [Section 4.2.2, "Verify the Guest User Account"](#).

4.2.2 Verify the Guest User Account

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

Steps

1. Log out of any Oracle applications.
2. Restart the Apache server.
3. Open the Oracle iStore Customer UI at the URL:
`http://<host>:<port>/OA_HTML/ibeCZzdMinisites.jsp`.

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

4.2.3 Set Mandatory Customer UI Profile Options

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

- [Section 4.2.3.1, "Mandatory iStore Customer UI Profile Options"](#)
- [Section 4.2.3.2, "Mandatory Oracle Quoting/Order Capture \(ASO\) Profile Options"](#)
- [Section 4.2.3.3, "Other Mandatory Profile Options"](#)

You can also set other Oracle iStore (IBE) profile options for the Customer UI if you do not want to use the default settings. See [Appendix A, "Profile Options"](#), for a complete list.

4.2.3.1 Mandatory iStore Customer UI Profile Options

Set the following mandatory IBE profile options at the iStore application level in order to configure the Customer UI. For more information, see [Section A.6, "Customer UI Mandatory Setup Profile Options"](#).

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

- **IBE: Pricing Event for Shopping Cart** --- Set to Batch Processing.
- **IBE: Create Order in Entered State, if it has errors while booking** --- Set to Yes.
- **IBE: Pricing Event--Before Shopping Cart** --- Set to Enter Order Line.
- **IBE: Default Payment Term** --- Set to the payment term that will be the default payment term for orders.

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

Set the following mandatory Oracle Order Capture and Oracle Quoting profile options to configure the Customer UI. Set these at the application level to iStore, unless it is stated otherwise in the descriptions -- see [Section A.6, "Customer UI Mandatory Setup Profile Options"](#), and [Section A.14, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#), for more information.

See also: *Oracle Order Management Suite Implementation Guide*

1. **ASO: Automatic Numbering** --- Set to Yes at site and application levels.
2. **ASO: Credit Card Authorization** --- Set to Yes if you are implementing online credit card authorization; otherwise, set to No.
3. **ASO: Default Quote Status** --- Set to Store Draft.
4. **ASO: Default Order State** --- Set to Booked.
5. **ASO: Default Order Type** --- Set to Mixed.
6. **ASO: Default Sales Rep** --- Set to default sales representative for sales assistance
7. **ASO: Enable TCA Changes** --- Set to Yes.
8. **ASO: OM Defaulting** --- Set this to No or Yes, depending upon your configuration of Oracle Order Management and your business needs. See [Section 2.10.1, "Setting up Defaulting Rules"](#), for more information.

4.2.3.3 Other Mandatory Profile Options

Also set the following mandatory profile options:

- **Sequential Numbering** --- Set to `Always` Used at site level. This profile option (which unlike other profile options has no product prefix, such as IBE or ASO), is required in the iStore orders process.
- **HZ: Generate Party Number** and **HZ: Generate Party Site Number** --- Set to `Yes` at iStore application level, in order to auto-generate party numbers and party site numbers.

4.3 Testing Sites

You should verify that the Customer UI works correctly before launching your sites. See [Section 19.1.1, "Testing the Sites"](#).

4.4 Additional Implementation Tasks

After performing the required tasks in this chapter, continue your implementation by performing the following tasks, some of which are optional. The following table, Additional Required and Optional Implementation Tasks, can guide you in your setup of Oracle iStore.

Table 4–1 Additional Required and Optional Implementation Tasks

Task	Req.?	Reference
Create sites	Yes	Chapter 5, "Implementing Site Management"
Verify or alter Customer UI initial landing page settings	No	Chapter 6, "Implementing Initial Customer UI Pages"
Implement or verify products setup	Yes	Chapter 7, "Implementing Products"
Set up pricing	Yes	Chapter 10, "Implementing Pricing"
Set up catalog	Yes	Chapter 8, "Implementing the Catalog"
Add content to sites	No	Chapter 9, "Implementing Content"
Set up payment types and shipping methods	Yes	Chapter 11, "Implementing Payment Types and Shipping Methods"
Configure carts and orders	No	Chapter 12, "Implementing Carts and Orders"
Set up users	Yes	Chapter 13, "Implementing User Management"
Set up customer assistance	No	Chapter 14, "Implementing Customer Assistance"
Configure messages	No	Chapter 15, "Implementing Messages and Prompts"

Table 4–1 Additional Required and Optional Implementation Tasks (Cont.)

Task	Req.?	Reference
Set up reports	No	Chapter 16, "Implementing Reports"
Understand global features	No	Chapter 17, "Implementing Globalization and Multi-Org Architecture"
Understand performance	No	Chapter 18, "Implementing Performance and SSL"
Integrate with Oracle Advanced Supply Chain Planning	No	Chapter 21, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"
Integrate with Oracle Bills of Material	No	Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"
Integrate with Oracle Configurator	No	Chapter 23, "Integrating Oracle iStore with Oracle Configurator"
Integrate with Oracle Content Manager	No	Chapter 24, "Integrating Oracle iStore with Oracle Content Manager"
Integrate with Oracle iSupport	No	Chapter 25, "Integrating Oracle iStore with Oracle iSupport"
Integrate with Oracle Marketing	No	Chapter 26, "Integrating Oracle iStore with Oracle Marketing"
Integrate with Oracle Partner Management	No	Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"
Integrate with Oracle Quoting	No	Chapter 28, "Integrating Oracle iStore with Oracle Quoting"
Integrate with Oracle Sales Applications	No	Chapter 29, "Integrating Oracle iStore with Oracle Sales Applications"
Integrate with Oracle Sales Contracts	No	Chapter 30, "Integrating Oracle iStore with Oracle Sales Contracts"
Integrate with Oracle Shipping Execution	No	Chapter 31, "Integrating Oracle iStore with Oracle Shipping Execution"
Implement Single Sign-On	No	Chapter 32, "Integrating Oracle iStore with Oracle Single Sign-On"
Integrate with Oracle 9iAS Web Cache	No	Chapter 33, "Integrating Oracle iStore with Oracle9iAS Web Cache"
Integrate with Oracle Workflow	No	Chapter 34, "Integrating Oracle iStore with Oracle Workflow"

Implementing Site Management

This chapter describes the how to set up and manage sites in Oracle iStore 11*i*.

This chapter assumes you have performed the required implementation tasks outlined in [Chapter 2, "Verify Mandatory Dependencies"](#), and [Chapter 4, "Implementation Tasks for Oracle iStore"](#).

Main topics in this chapter include:

- [Section 5.1, "Site Management Overview"](#)
- [Section 5.2, "Creating Sites"](#)
- [Section 5.3, "Implementing Integrated Business Partner and Support Sites"](#)
- [Section 5.4, "Integrated Site Management Sample Business Flows"](#)

5.1 Site Management Overview

A cornerstone of online business today is the ability to reach a global customer base. Without this capability, web stores are restricted to selling to a limited audience, thus severely reducing the market for their products. Oracle iStore addresses this fundamental requirement by providing the ability to create multiple sites which support online business in almost any country, currency, or language.

For an introduction and overview of Oracle iStore, see [Section 1.1, "Oracle iStore Overview"](#).

Using Oracle iStore sites, merchants can:

- Target different customer segments with different sites and catalogs
- Support globalization features, such as multiple languages and currencies
- Brand each site differently

- Provide different content for the same product on different sites
- Enable different payment and shipping methods for each site
- Set different price lists on each site for each user type (guest, B2C, B2B)
- Set attributes at the site level (such as allowing guest users, allowing ATP checks, etc.)
- Restrict sites via user responsibilities
- Set organization-level access controls
- View site reports

You can also integrate your sites with the Oracle iSupport and Oracle Partner Management applications -- See [Section 5.3, "Implementing Integrated Business Partner and Support Sites"](#), to begin understanding the capabilities of this functionality.

5.1.1 Site Concepts

In the context of Oracle iStore, a *site* is any site that the administrator creates using the Site Administration UI. After you map a site to a customer responsibility and save it, you have created a *specialty site*. Multiple specialty sites can exist within one site, as each site-responsibility combination is considered a specialty site. All specialty sites within a site utilize the same site parameters. In the Customer UI, specialty sites are listed in the Site Selection Page -- which specialty sites display to users is based on setup parameters, customer responsibility, and any permission checking or access restrictions set up for the sites.

Additional Points

- You can create as many sites and specialty sites as you wish, all within a single instance.
- You can implement sites which support multiple languages and currencies.
- Each site can have multiple payment types and shipping methods enabled.
- Each site supports any number of responsibilities. However, you can not use the same responsibility more than once per site.
- Each specialty site (site-responsibility combination) supports only one customer responsibility.

- The responsibility which is associated with a specialty site determines the operating unit against which any orders are placed (this association is made through the MO: Operating Unit profile option, set at responsibility level).
- The default Customer UI landing page is called the Site Selection Page. It displays all specialty sites that are accessible to the responsibilities of the users viewing the page, plus all sites that are public and not restricted by responsibility. If the customer can only access one specialty site, Oracle iStore automatically forwards the user to the Site Home Page of that specialty site, and the user does not see the list of specialty sites.

5.1.1.1 Site Group Navigation Logic and Guidelines

Sites can be categorized into groups for display purposes in the Customer UI. Three seeded groups are available for Oracle iStore and the two other integrating applications for which Oracle iStore offers end-user support: Oracle iSupport and Oracle Partner Management. The seeded group names are: Stores, Support, and Partners. The names of the groups are extensible lookups, allowing you to change the names to whatever names you wish, or to create new group names. The Site Selection Page features an LOV via which users can filter the groups that display. The groups also can be used for displaying navigation bins in the Customer UI. (Refer to the "See also" points at the end of this section for links to additional information.) Following are some navigation logic points and guidelines to help your understanding of site groups.

- If a user filters the list of sites by group and this group has only one site, Oracle iStore automatically forwards the user to the Site Home Page of that site.
- You can direct users to a group through a URL. If you direct a customer to the Site Selection Page through the URL:
 - The specific group is displayed in the Site Selection Page.
 - If the group contains only one accessible specialty site, the user is forwarded to the Site Home Page of the site.
 - If the URL specifies a non-existent group, all sites are displayed instead of sites within the group.
 - URL direction parameters can have a group code (non-translatable), but not a group name.
 - The group code is case-sensitive and can be lower case. All seeded groups are upper case.

- If one group is included in only one site, and/or the site only supports one language, when users navigate to the Site Selection Page using a group specified in a URL, Oracle iStore redirects the user to the site within that group automatically.
- The syntax for directing users to a group should be `http://.../OA_HTML/ibeCZzdMinisites.jsp?grp=<group_code>`.

See also:

- [Section 5.3, "Implementing Integrated Business Partner and Support Sites"](#)
- [Section 6.4.3, "Group Picker"](#)
- [Section 8.10.6, "Group Bins"](#)
- [Section 8.10.7, "Custom Group Bins"](#)
- [Section 15.6.4, "Site Group Names Lookup"](#)

5.2 Creating Sites

This section details site creation steps. Main topics include:

- [Section 5.2.1, "Create a Site: Getting Started and Entering Basic Information"](#)
- [Section 5.2.2, "Create a Site: Assigning Languages"](#)
- [Section 5.2.3, "Create a Site: Assigning Currencies"](#)
- [Section 5.2.4, "Create a Site: Assigning Price Lists"](#)
- [Section 5.2.5, "Create a Site: Assigning Payment Types"](#)
- [Section 5.2.6, "Create a Site: Assigning Shipping Methods"](#)
- [Section 5.2.7, "Create a Site: Assigning Responsibilities \(Creating Specialty Sites\)"](#)
- [Section 5.2.8, "Create a Site: Manually Ordering Specialty Site Display Names"](#)
- [Section 5.2.9, "Create a Site: Assigning Groups"](#)
- [Section 5.2.10, "Create a Site: Setting Organization Access Restrictions"](#)
- [Section 5.2.11, "Create a Site: Setting Payment Threshold"](#)

5.2.1 Create a Site: Getting Started and Entering Basic Information

Begin the site creation process by entering basic information for a site, such as name, description, and default parameters.

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

Steps

1. Log in to the Site Administration UI as iStore Administrator.

Note: By default, only active sites appear in the Sites page. To view inactive sites, select Inactive Sites or All Sites from the Search LOV.

2. In the Sites page, select Create a Site. The Create Site page opens, where you can enter basic information for a site:

Note that all fields can be altered after the site is saved.

- **Site Name** --- Does not display to the customer.
 - **Site Code** --- Once entered, this code is unique across sites in all instances implemented, and can be used in the Template Import/Export functionality. See [Section D.3, "Display Template Mappings Import and Export"](#).
 - **Description** --- Does not display to the customer.
 - **Start Date** --- Live date for all specialty site(s) of this site; can also be controlled by setting supported responsibility start date.
 - **End Date** --- To remove a site from operation, you must end-date it. End date can also be controlled by setting supported responsibility end date.
3. **Select default language** --- Select the default language for the site. This step is expanded in [Section 5.2.2, "Create a Site: Assigning Languages"](#).
 4. **Select default currency** --- Select the default currency for the site. This step is expanded in [Section 5.2.3, "Create a Site: Assigning Currencies"](#).
 5. **Select walk-in price list** --- Select the default walk-in (guest user) price list for the site. This step is expanded in [Section 5.2.4, "Create a Site: Assigning Price Lists"](#).
 6. **Select the catalog root section** --- All sites are referenced against a single parent node (or browsing section), which may or may not have child sections. If the root section has both navigational and featured subsections, the featured subsection won't be displayed in catalog pages.

Only the following types of sections should be assigned as site root sections:

- Sections which contains at least one navigational subsection
- Sections which are leaf sections (contain only products, not subsections)

Further, when assigning a root section to a site, do not use:

- Unpublished or non-active sections, as this will cause incorrect rendering in the Customer UI
- Sections which only have featured subsections; Oracle iStore does not support this

See [Section 8.8, "Creating and Maintaining Sections"](#), for additional guidelines.

7. Select optional parameters:

- **Allow un-registered users to browse the site** --- By selecting this feature, all specialty sites within this site will allow guest user access.
- **Allow customers to check item availability** --- By selecting this feature, you enable customers to check Available to Promise (ATP) information for items in their carts. Do not select this unless you have set up either Regular or Global ATP. See [Section 7.4, "Providing Regular Available to Promise \(ATP\)"](#), and [Section 21.2.1, "Setting up Global Available to Promise \(ATP\)"](#).
- **Restrict customer access by responsibility** --- By selecting this feature, all specialty sites within this site will check customer responsibility as customers approach the default landing page, the Site Selection Page. In this case, only those specialty sites whose supported responsibilities match that of the approaching customer will be displayed on the page.
- **Enable Threshold for Payment Types** --- This is one of the steps to enable the Payment Threshold feature. See [Section 5.2.11, "Create a Site: Setting Payment Threshold"](#).

8. Select Apply to save changes.

Note: Upon creation, your site will be given a unique Site ID number, which you can view in the Update Site: Details page. Site ID is the same as the Minisite ID.

9. Continue creating your site using the following sections:

- [Section 5.2.2, "Create a Site: Assigning Languages"](#)
- [Section 5.2.3, "Create a Site: Assigning Currencies"](#)
- [Section 5.2.4, "Create a Site: Assigning Price Lists"](#)
- [Section 5.2.5, "Create a Site: Assigning Payment Types"](#)

- [Section 5.2.6, "Create a Site: Assigning Shipping Methods"](#)
- [Section 5.2.7, "Create a Site: Assigning Responsibilities \(Creating Specialty Sites\)"](#)
- [Section 5.2.8, "Create a Site: Manually Ordering Specialty Site Display Names"](#)
- [Section 5.2.9, "Create a Site: Assigning Groups"](#)
- [Section 5.2.10, "Create a Site: Setting Organization Access Restrictions"](#)
- [Section 5.2.11, "Create a Site: Setting Payment Threshold"](#)

5.2.2 Create a Site: Assigning Languages

Your implementation will be installed with a single language known as the *base language*. The base language cannot be changed or deleted from the Site Administration UI. Languages in addition to the base language must be first installed and implemented in Oracle Applications before they will appear in the Site Administration UI. In addition, your implementation must be multiple-organization enabled. See [Section 17.3, "Implementing Globalization with Oracle iStore"](#).

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button next to the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Language hyperlink. The Languages page displays a list of languages currently supported by the site.
5. To add a language, select the Add Language button. This will launch the Select: Languages page, where you can choose additional, installed languages.
6. To disable a language, select the radio button of the language and press the Change Status button.
 - The status of the base language cannot be changed.
 - When you disable a language in the Site Administration UI, this does not remove any Display Template or media object mappings you have set up using the language.

5.2.3 Create a Site: Assigning Currencies

In this section, you select currencies for the site. Currencies must be set up in Oracle General Ledger before they can be selected in the Site Administration UI. See the *Oracle General Ledger User Guide* for more information.

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Pricing hyperlink. The Pricing page shows and allows selection of currencies, price lists, and payment thresholds for a site.
5. To add a currency, select the Add Currency button.
6. In the Search and Select: Currencies page that appears, search for and select the appropriate currencies. Add a currency by activating the box next to the currency and pressing the Select button.

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

5.2.4 Create a Site: Assigning Price Lists

Price lists must be set up in the pricing application before they can be selected in the Site Administration UI. See [Section 10.6, "Steps to Create Price Lists"](#).

Note: The maximum amount field on the Pricing page is a placeholder, and iStore does not enforce this by default. It is provided on the UI only for customization purposes.

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Pricing hyperlink. The Pricing page appears. The Pricing page shows and allows update of all currencies, price lists, and payment thresholds associated with a site.

5. For each supported currency, choose the price lists for Walk-in Customers (guest users), Individual Customers (B2C users), and Business Customers (B2B users). Use the flashlight icons to search and select price lists.
6. In the Search and Select: Price Lists page that appears, search for and select the appropriate price lists. Select a price list by activating a radio button in the Select column and pressing the Select button. If multi-currency price lists are enabled, you can choose the same price list for a different currency. See [Section 10.2.1, "Multiple-Currency Price Lists"](#).
7. When you have returned to the Pricing page, select Apply to save changes. The currencies and price list selections are now saved to the database.

To remove currency/price list combinations, select the appropriate Remove icon in the Pricing page. You cannot remove the default currency.

5.2.5 Create a Site: Assigning Payment Types

Payment types must first be set up in Oracle Applications before they can be selected in the Site Administration UI. Only the payment types supported by a site will display in the Customer UI. See [Chapter 11, "Implementing Payment Types and Shipping Methods"](#).

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Payment hyperlink. The Payment Types page appears, showing all payment types supported by this site.
5. To add payment types, select the Add Payment Type button. The Select: Payment Types page appears. Select the payment types you wish this site to support, and then press the Select button to add the payment type(s) to the site.
6. When you have returned to the Payment Types page, select Apply to save changes.

To remove a supported payment type, press the Remove icon for the appropriate type.

7. Enable or disable the following checkboxes:

- **Ask for Purchase Order** --- If checked, users can enter purchase order numbers during checkout for all specialty sites within this site. 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.

5.2.6 Create a Site: Assigning Shipping Methods

Shipping methods must be set up in Oracle Forms' Shipping menus before they will display in the Site Administration UI. Only the shipping methods supported by a site will display in the Customer UI. See [Chapter 11, "Implementing Payment Types and Shipping Methods"](#).

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Shipping hyperlink. The Shipping Methods page appears, displaying all supported shipping methods for this site.
5. To add a shipping method, select the Add Shipping Method button. The Select: Shipping Methods page appears.
6. In the Select: Shipping Methods page, select the shipping methods you wish this site to support. Press the Select button to add the shipping methods to the site.

To remove a shipping method from the site: In the Shipping Methods page, select the shipping method and press the Remove icon.

5.2.7 Create a Site: Assigning Responsibilities (Creating Specialty Sites)

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

A single Customer UI responsibility is seeded for the default customer user; it is IBE_CUSTOMER. This responsibility is associated to all available Oracle iStore user types by default during registration. When you create a site, IBE_CUSTOMER is assigned to the site by default.

Oracle iStore also supports using Oracle iSupport and Oracle Partner Management responsibilities for Customer UI users. If you wish to assign other responsibilities to customers, you must change user types setup, defining new Oracle CRM User Management enrollments associated to the user types and mapping the corresponding responsibilities to the appropriate sites. See [Chapter 13, "Implementing User Management"](#), for more information.

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Responsibility hyperlink. The Supported Responsibilities page displays.
5. If you have not removed it, the default customer responsibility, IBE_CUSTOMER, will be mapped to the site.
 - 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 site, enter the display name in the Site Display Name textbox and press Apply to save the change.
6. To map a new responsibility to the site, select the Add Responsibility button. The Search and Select: Responsibility page opens. Search for responsibilities. In the search results, mark the checkbox next to the desired responsibility, and press the Select button to add the responsibility to the site.

Note: You can only use the same responsibility once per site.
7. **Enter Display Names** --- In the Responsibilities page, in the Site Display Name field, enter the specialty site display name for each specialty site (site-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 default to the site name. If you wish to change this display name, you can edit it later by returning to this screen.

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

5.2.8 Create a Site: Manually Ordering Specialty Site Display Names

Oracle iStore allows you to manually re-order the display order of the specialty sites in the Site Selection Page. The order is set across all specialty sites in your instance.

Important: The profile option, IBE: Use Display Order Feature, must be Yes to use the display order feature (the default value is Yes). See [Section A.5.0.7, "IBE: Use Display Order Feature"](#), for more information.

If not manually ordered, specialty sites are arranged in case-insensitive, alphabetical order at runtime in the Customer UI.

Steps

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

5.2.9 Create a Site: Assigning Groups

Oracle iStore allows you to organize speciality sites into groups. The Site Selection Page page in the Customer UI will display the specialty sites within a site according to groups that you place them in. You also can assign a single speciality site to multiple groups.

Guidelines

- The Site Selection Page can only display groups and the specialty site picker if you set the profile option, IBE: Maximum Columns in Specialty Site Page. See [Section 6.2.5, "Setting up Site Selection Page Columns"](#), for details.
- If no site is associate to a group, all sites are displayed without categorization in the Site Selection Page, and the Group LOV is not displayed. Additionally, if all sites are associated to only one group, the Group LOV does not display.
- The site group names are extensible lookups for which you can change values and/or disable. See [Section 15.6, "Modifying Oracle Application Object Library Lookups"](#), and [Section 15.6.4, "Site Group Names Lookup"](#).
- Groups can be displayed in navigation bins on site pages. See [Section 8.10.6, "Group Bins"](#).
- When a specialty site is not associated with a group (or if a group is disabled that had contained sites), it will show up in the uncategorized Others group on the Site Selection Page.

See also: [Section 5.1.1, "Site Concepts"](#)

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Responsibility hyperlink. The Supported Responsibilities page displays.
5. Select the Assign Groups icon in the appropriate row. The Update Site: Assign Groups page opens.
6. The Unassigned Groups and Assigned Groups windows display the groups available for assignment. Seeded values are:
 - **Store** -- You can use this group to contain all specialty sites you wish associated with Oracle iStore.
 - **Support** -- You can use this group to contain all specialty sites you wish associated with Oracle iSupport.
 - **Partner** -- You can use this group to contain all specialty sites you wish associated with Oracle Partner Management.

If a group name has been disabled, it will not appear in the page.

7. Use the right and left arrows to make the group assignments for the specialty site.
8. Press Apply to save changes.

5.2.9.1 Group Bins

Optionally, for the catalog pages, set up navigation bins which display the specialty sites within the groups. See [Section 8.10.6, "Group Bins"](#), and [Section 8.10.7, "Custom Group Bins"](#).

5.2.10 Create a Site: Setting Organization Access Restrictions

Access restrictions allow you to control a B2B user's access to the Customer UI based on his organization. When you use access restrictions, you do one of the following:

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

Steps

1. Log into the Site Administration UI and select the Sites tab. The Sites page displays a list of the sites in your implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. Select the Access hyperlink. The Access Restrictions page opens.
5. Select the appropriate radio button:
 - **No restriction:** Select this radio button to have no organization-related access restrictions on the site.
 - **Exclude the following organizations:** Select this radio button to restrict access to the site by users associated with the organization(s) you specify.
 - **Include the following organizations:** Select this radio button to allow access to the site only by users associated with the organization(s) you specify.
6. To add an organization to the list, select the Add Organization button. The Search and Select: Organization page appears.

7. In the Search and Select: Organization page, search for organizations. Select the checkboxes next to the organizations you wish to add to the list, and press the Select button to add the organization(s).
8. When you have returned to the Access Restrictions page, save changes by pressing the Apply button. Remember to ensure that the appropriate access restriction radio button is selected at the top of the page.
9. In the Start Date field, change the default start date for the restriction if desired, using the calendar icon to pick a date. Optionally, select an End Date.
10. Press Apply to save changes.

5.2.11 Create a Site: Setting Payment Threshold

Payment Threshold functionality allows you to enable only certain payment types in your specialty sites, if the user places an order whose amount is under the threshold amount. See [Section 11.4, "Using Payment Types Threshold"](#).

5.3 Implementing Integrated Business Partner and Support Sites

Oracle iStore supports integrating the Customer UI with Oracle iSupport and Oracle Partner Management. This close integration allows comprehensive B2B customer support and extensive B2B cooperative abilities, including:

- Support for Oracle iSupport and Oracle Partner Management users in the Customer UI
- Fully integrated navigation between Oracle iStore, Oracle iSupport, and Oracle Partner Management applications through a common dashboard in the Customer UI. For example, to access Oracle iSupport or Oracle Partner Management from the Customer UI, users can select any number of implemented Oracle iSupport or Oracle Partner Management links in the Quick Links bin to navigate to specific areas of these integrating applications. To navigate back to the Customer UI, users simply select the Return to Dashboard navigation icon.
- Configurable Site Selection Page which shows all specialty sites by group and allows filtering by site group
- Site grouping functionality, allowing implementers to group sites logically on the Site Selection Page to ease navigation, as well as the ability to assign a single specialty site or sites to several groups. For this purpose, group lookups are provided.

- Seeded group navigation bins that allow users to navigate to other sites within a specific group. These bins can support navigation to custom groups as well.
- Navigation icon called Sites that customers can access to return to the Site Selection Page from other areas of the Customer UI
- Ability to keep currency and language context when navigating between participating applications
- Support for permission and responsibility checking in the Customer UI for users of the integrating applications
- Ability for B2B users to switch accounts in Oracle iStore pages
- Common user registration pages and flow for participating applications
- Support for partner registration flow and partner permission checking in the Customer UI
- Common user profile screens that are configurable by application -- participating applications can display their own user personal information screens by setting an iStore profile option and linking their menu structures
- Full support for and data consistent with the Oracle Trading Community Architecture model

Where to find more information

- For information on implementing the group bins, see [Section 8.10.6, "Group Bins"](#), [Section 25.3.6, "Enabling the Support Group Bin"](#), and [Section 27.2.7, "Enabling the Partners Group Bin"](#).
- For information on implementing the Quick Links bin, see [Section 25.3.5, "Enabling the Quick Links Bin"](#), and [Section 27.2.6, "Enabling the Quick Links Bin"](#).
- For specific information on how to set up and use the site integration with Oracle iSupport, see [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#).
- For details on the Oracle Partner Management integration, see [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#).
- For information on user management, see [Chapter 13, "Implementing User Management"](#), and [Appendix C, "Seeded User Data"](#).
- See [Section 5.2, "Creating Sites"](#), for steps detailing how to create sites.

- For navigation information within Site Management, see [Section 5.3.1, "Navigation Behavior with Integrated Applications"](#), and [Section 5.4, "Integrated Site Management Sample Business Flows"](#), within this chapter.
- See the relevant Oracle iSupport or Oracle Partner Management documentation for site management data seeded with those applications.

5.3.1 Navigation Behavior with Integrated Applications

When integrating your sites with Oracle iSupport and/or Oracle Partner Management, you can expect the following navigation behavior:

- **Login** -- Users of the integrating applications can log in to their applications through the Oracle iStore Customer UI.
- **Logout from Oracle Partner Management** --- The Partner Home Page, if implemented, in the Oracle iStore Customer UI is the dashboard of Partner sites created using the Oracle iStore framework. This page targets Oracle Partner Management users, allowing partners to log in and log out only through the Oracle iStore Customer UI framework. Partner users can navigate to the appropriate Oracle Partner Management function and then come back to the portal to log out.
- **Logout from Oracle iSupport** --- Users can navigate to Oracle iSupport through the navigation bin displayed in the Site Home Page, and users can log out either from the Site Selection Page or from the Site Home Page.
- **Logout target pages** --- When a user logs out, the following targets and scenarios are supported:
 - Target is the Login page if no public site is defined and only one site is enabled.
 - Target is the Site Selection Page if there are multiple accessible sites available for the user, and the current site doesn't support guest user, or the user hasn't select any site yet.
 - Target is the Site Home page if the current site supports guest users.
 - Additionally, a custom target URL can be defined.
- **Navigation icons** --- The Oracle CRM Technology Foundation (JTT) Login and Logout icons will be hidden in Oracle iSupport and Oracle Partner Management. The following navigation icons will display instead:
 - Login (provided by Oracle iStore)

- Logout (provided by Oracle iStore)
- Register (provided by Oracle iStore)
- Return to Dashboard

The Login, Logout, and Register icons call Oracle iStore processing pages and direct users to Oracle iStore pages, following Oracle iStore logic. The Dashboard icon allows users to return to the Dashboard (Customer UI). See [Section 6.4.8, "Navigation Icons"](#), for more information on the navigation icons.

- **Quick Links bins** --- After setup, this bin allows navigation to the integrating applications. For information on implementing the Quick Links bin, see [Section 25.3.5, "Enabling the Quick Links Bin"](#), and [Section 27.2.6, "Enabling the Quick Links Bin"](#).
- **Group bins** --- Navigation to specialty sites within specific groups can be enabled through group bins. Seeded groups are provided. And, you can create additional navigation bins for custom groups by re-using the seeded JSP and modifying the group code of the bin. See [Section 8.10.6, "Group Bins"](#), and [Section 8.10.7, "Custom Group Bins"](#), for details.
- **Currency and language context preservation** -- When navigating between applications, currency and language context are preserved. For example, if a user accesses a site, selecting U.S. dollar as the currency and French as the language, and then navigates to a different application, the application understands and preserves the session language and currency.
- **Ability to switch accounts** --- When a user access the Customer UI, the primary account number is set into the cookie. If the user hasn't defined the primary account, the first created account is used. An account switcher, located in the Welcome Bin on the Site Home Page, allows B2B users to switch to a different account assigned to them within their organization. Note that only the account number will display, not the account description. When the user switches accounts, the new value is set again into the cookie. Oracle iStore reloads the page, and the user sees only information (carts, orders, etc.) related to that financial account. The user can only place an order with the current account. If a user changes his primary account in the user Profile pages, the change takes effect only when the user re-logs in.
- **Ability to preserve consistent account information when navigating from Oracle iStore to Oracle iSupport** --- The user's current account is stored in the session cookie, and the session always refers to the cookie to retrieve the appropriate value in both Oracle iStore and Oracle iSupport applications.

5.4 Integrated Site Management Sample Business Flows

The following business flows and related diagrams can aid your understanding of possible integrated application scenarios:

- [Section 5.4.1, "User Navigates to Integrated Applications from Single Shared Site"](#)
- [Section 5.4.2, "Partner Navigates to Integrated Applications from Multiple Sites"](#)

5.4.1 User Navigates to Integrated Applications from Single Shared Site

Note that this sample scenario assumes:

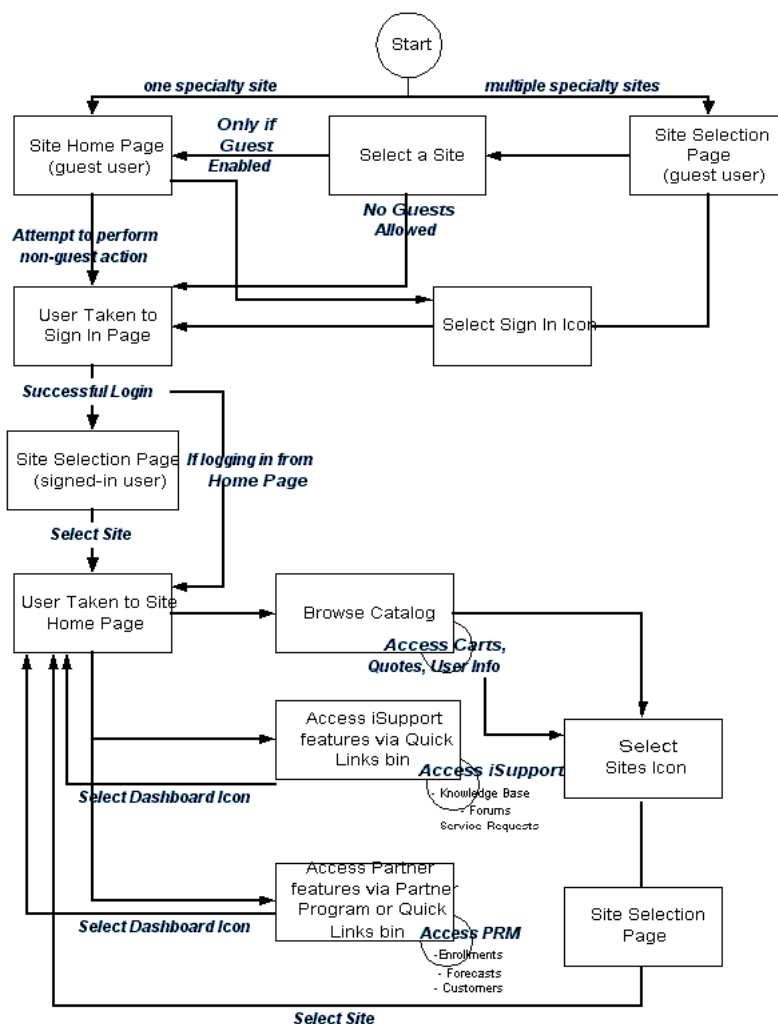
- Your implementation navigates users to the Site Selection Page by default. See [Section 6, "Implementing Initial Customer UI Pages"](#), for information on the default landing page options.
 - The user is already registered.
1. A user approaches the website.
 - If only one site is available to the user, he is forwarded to the Site Home Page as a guest user. From this page, he can log in and access the Site Home Page as a logged-in user.
 - If a multiple sites are available to the user, the user can select a site from the Site Selection Page, and if guest user access is allowed, he is taken to the Site Home Page as a guest user. From here, he can sign in and access the Site Home Page as a signed-in user.
 - The user also can log in from the Site Selection Page. In this case, after login, he is re-directed to the Site Selection Page, where all available sites are displayed. Then he can select a site and access the Site Home Page as a signed-in user.
 - If no guest user access is allowed in any sites, or if the user has elected to log in, then the Login page is displayed.
 2. Assuming that the site is associated to a responsibility that integrates Oracle iStore, Oracle iSupport and Oracle Partner Management the user can:
 - Select the Partner Program link in the Partner Program Bin and navigate to program enrollments.
 - Navigate to Oracle iSupport through the Quick Links navigation bin displayed under the Support tab. In Oracle iSupport, he can access service

requests, the knowledge base, and forums, depending upon how Oracle iSupport is implemented. He can return to the Site Home Page by selecting the Dashboard navigation icon from Oracle iSupport.

- Navigate to Oracle Partner Management through the Quick Links navigation bin displayed under the Partners tab. In the Oracle Partner Management application, he can access opportunities, customers, and forecasts, depending upon the Oracle Partner Management implementation. He can return to the Site Home Page by selecting the Dashboard navigation icon from Oracle Partner Management.
- Browse the catalog, potentially adding products to shopping carts and placing orders.
- Select the Sites navigation icon to access additional sites, if additional sites are available to him.

Partner-related functionality is available only when Oracle Partner Management users are implemented.

The following figure, [Figure 5–1, "User Navigates to Integrated Applications from Single Shared Site"](#), shows this flow.

Figure 5–1 User Navigates to Integrated Applications from Single Shared Site

5.4.2 Partner Navigates to Integrated Applications from Multiple Sites

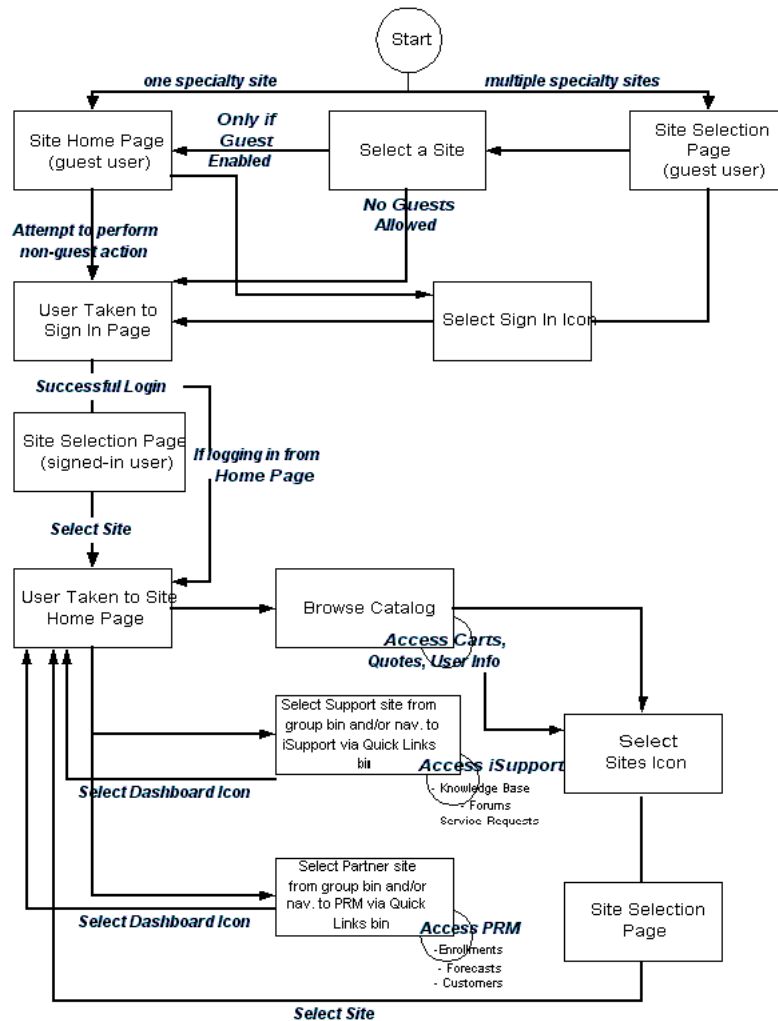
Note that this sample scenario assumes:

- Your implementation navigates users to the Site Selection Page by default. See [Section 6, "Implementing Initial Customer UI Pages"](#), for information on the default landing page options.

- The user is already registered.
- 1. A user approaches the website.
 - If only one site is available to the user and guest user access is allowed, he is forwarded to the Site Home Page. From this page, he can log in and access the Site Home Page as a signed-in user.
 - If a multiple sites are available to the user, the user can select a site in a group from the Site Selection Page, and if guest user access is allowed, he is taken to the Site Home Page as a guest user. From here, he can log in and access the Site Home Page as a signed-in user.
 - The user also can log in from the Site Selection Page. In this case, after login, he is re-directed to the Site Selection Page, where all available sites are displayed. Then he can select a site and access the Site Home Page as a signed-in user.
 - If no guest user access is allowed in any sites, or if the user has elected to log in, then the Login page is displayed.
- 2. Assuming integration with Oracle iSupport and Oracle Partner Management is in place, the user can:
 - Browse the catalog, potentially adding products to shopping carts and placing orders.
 - Navigate to Support sites through the Support Group Bin. In the Support site, user can select links within the Quick Links Bin and access service requests, the knowledge base, and forums, depending upon how Oracle iSupport is implemented. He can return to the Support Site Home Page by selecting the Dashboard navigation icon from Oracle iSupport.
 - Navigate to Partner Sites through the Partners Group Bin. From the Partner Site Home Page, user can select the Partner Program link in the Partner Program Bin and navigate to program enrollments, or navigate to Oracle Partner Management through the Quick Links navigation bin. In the Oracle Partner Management application, he can access opportunities, customers, and forecasts, depending upon the Oracle Partner Management implementation. He can return to the Partner Site Home Page by selecting the Dashboard navigation icon from Oracle Partner Management.
 - Access the Sites navigation icon to access additional sites, if additional sites are available to him.

The following figure, [Figure 5–2, "Partner Navigates to Integrated Applications from Multiple Sites"](#), shows this flow.

Figure 5–2 Partner Navigates to Integrated Applications from Multiple Sites



Implementing Initial Customer UI Pages

This chapter provides an introduction to the Oracle iStore 11*i* Customer UI and describes how the initial (start or landing pages) are implemented. Implementing the catalog is described in [Chapter 8, "Implementing the Catalog"](#).

Main topics in this chapter include:

- [Section 6.1, "Customer UI Overview"](#)
- [Section 6.2, "Site Selection Page"](#)
- [Section 6.3, "Site Home Page"](#)
- [Section 6.4, "Initial Landing Page Icons and Other Elements"](#)

See also: [Section 8.10, "Configuring Bin Placement and Content"](#)

6.1 Customer UI Overview

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

Site creation is described in [Section 5.2, "Creating Sites"](#).

By default, Oracle iStore provides two configuration options for controlling the appearance of the initial landing pages of the Customer UI:

1. Send users to the Site Selection Page as their initial landing page. This page shows a list of specialty sites accessible to the user. By default, this will be the page that displays specialty sites in your implementation.
2. Send users to a specialty site's home page, called the Site Home Page.

6.1.1 Customer UI Terminology

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

- **Browse Bin** --- Displaying by default on the left side of the Site Home Page, the Browse Bin allows users to navigate to sections within the specialty site. See [Section 6.4.1.1, "Browse Bin"](#), for more information.
- **Global Bin** --- The Global bin displays a currency picker, and can display other elements. See [Section 6.4.1.2, "Global Bin"](#), for more information.
- **Group Picker** --- The group picker is an LOV that displays on the Site Selection Page and allows users to filter the display of groups on the page. See [Section 6.4.3, "Group Picker"](#), for more information.
- **Guest user** --- This is a user who is not logged in, and is also called a walk-in user. Unless a particular site does not allow walk-in users, this user can browse, configure items, and add items to his cart, but cannot place orders without registering. See [Section 4.2.1, "Set up Guest User Access"](#), for more information.
- **Language list** --- This is the list of supported languages across the top of the Specialty Site Page. Each language is an image link allowing users to switch their current session language. See [Section 6.4.6, "Language List"](#), [Figure 6–7, "Language List Example"](#), and [Section 6.4.4, "Language Images"](#), for more information.
- **Language links** --- The Language Links are the hyperlinks that show the available languages for a specialty site. They display beneath each specialty site in the Site Selection Page. Each hyperlink represents a specific language. See [Section 6.4.5, "Language Links"](#), and [Figure 6–6, "Language Links Example"](#), for more information.
- **Navigation icons** --- Several universal navigation icons display at the top of the Site Selection Page. Many of these also display at the top of the Site Home Page. See [Section 6.4.8, "Navigation Icons"](#), for more information.
- **Preview mode** --- Oracle iStore's Preview mode allows merchants to preview Customer UI specialty sites while working on them in the Site Administration UI. To use preview mode, select the Preview button on applicable pages. In preview mode, all products and sections within a specialty site --- both published/unpublished and active/inactive --- are viewable from the Site Administration UI. Site setup changes can be seen immediately. See [Section 19.1.2, "Using Preview Mode"](#), for more information.

- **Quick Search** --- The Quick Search utility displays on the Site Home Page, and lets users search for products. See [Section 6.4.9, "Quick Search"](#), for more information.
- **Site** --- When you create a site in the Site Administration UI, it is considered a *site*, and is uniquely identified by the numerical Site ID. Once you add a responsibility to the site, each iteration of site-responsibility is considered a *specialty site*. See [Chapter 5, "Implementing Site Management"](#), for more information.
- **Site Home Page** --- The Site Home Page is the first visible catalog page of a specialty site. You can configure it to be the default landing page. See [Section 6.3, "Site Home Page"](#), for more information.
- **Site Selection Page** --- Using the JSP, `ibeCZzdMinisites.jsp`, this page lists available specialty sites and languages. By default, this page is the landing page for the Customer UI. See [Section 6.2, "Site Selection Page"](#), and [Figure 6-1, "Site Selection Page in Multiple Columns Example"](#), for more information.
- **Specialty site** --- A specialty site is any online site (available in the Customer UI) created through the Oracle iStore Site Administration UI. It is a combination of one site and one responsibility. Each site supports any number of customer responsibilities, but each specialty site supports only one responsibility. The responsibilities supported by the site are selected during setup. See [Section 5.2, "Creating Sites"](#), for more information.
- **Specialty Site Picker** --- Controlled by a profile option, this LOV of accessible specialty sites on the Site Home Page is used to switch between specialty sites. See [Section 6.4.10, "Specialty Site Picker"](#), and [Figure 6-9, "Specialty Site Picker Example"](#), for more information.
- **Templates/Display Templates** --- Templates linked to source JSP files present the Customer UI pages. Oracle iStore ships with hundreds of templates to configure your Customer UI. For more information, see [Section 8.1, "Understanding Customer UI Page Display"](#), and [Section 8.2, "Display Templates Overview"](#). See [Appendix E, "Display Templates and Media Objects"](#), for a list of templates.
- **Welcome Bin** --- This bin displays by default on the right side of the Site Home Page in the Customer UI, and contains a login link and other information for the user. For more information, see [Section 6.4.1.3, "Welcome Bin"](#), and [Figure 6-4, "Welcome Bin Example"](#).

6.2 Site Selection Page

The Site Selection Page shows all specialty sites that are accessible to the user in case-insensitive, alphabetical order (unless you have manually ordered the names). Which specialty sites display is based on user responsibility and access restrictions enabled during setup. See the following topics for more information:

- [Section 6.2.1, "Site Selection Page Overview"](#)
- [Section 6.2.2, "Languages Implemented"](#)
- [Section 6.2.3, "Integration with Other Oracle Applications"](#)
- [Section 6.2.4, "Additional Site Selection Page Functionality"](#)
- [Section 6.2.5, "Setting up Site Selection Page Columns"](#)

See also: [Section 6.4, "Initial Landing Page Icons and Other Elements"](#)

6.2.1 Site Selection Page Overview

The Site Selection Page is the initial landing page by default for the Customer UI, and is enabled by the profile option, IBE: Use Specialty Sites Selection Page. See [Section 6.2.4, "Additional Site Selection Page Functionality"](#), for more information.

6.2.2 Languages Implemented

In a multiple-language implementation, the specialty sites that are available will include one or more language links underneath them. Each language link displays the name of a supported language. Users select the appropriate language link to enter the specialty site. See [Section 6.4.5, "Language Links"](#), for more information.

In a single-language implementation, the Site Selection Page displays a single droplist of available sites. This display can be controlled by setting a profile option. See [Section 6.2.5, "Setting up Site Selection Page Columns"](#), for details.

See [Section 17.3.2, "Install Languages and Currencies"](#), for more information on languages implementation.

6.2.3 Integration with Other Oracle Applications

If integrating with other applications, (for example, Oracle iSupport or Oracle Partner Management), the Site Selection Page can display specialty sites by group, and allows users to filter the display by group. See [Section 5.3, "Implementing Integrated Business Partner and Support Sites"](#), for more information.

6.2.4 Additional Site Selection Page Functionality

Following are some additional points about Site Selection Page behavior:

- If a customer can only access one specialty site, he is automatically forwarded to that specialty site's Home Page and does not see a list of specialty sites.
- Sites which do not allow guest user access will display an asterisk (*) near their display name; users are required to log in to access these sites. Guest user access is controlled by the flag, *Allow un-registered users to browse the site*. This flag is enabled during site setup.
- Guest users approaching this page will be redirected to the Login page if no guest-accessible specialty site is available.
- If the profile option, IBE: Use Specialty Sites Selection Page, is No, customers will be redirected to the Site Home Page. In this case, the default specialty site will be picked up from the profile option, IBE: Default Specialty Site. See [Section A.7.0.77, "IBE: Use Specialty Sites Selection Page"](#), and [Section A.7.0.26, "IBE: Default Specialty Site"](#), for more information.
- The profile option, IBE: Use Display Order Feature, controls whether you can manually set the display order of Site Selection Page specialty sites. See [Section 5.2.8, "Create a Site: Manually Ordering Specialty Site Display Names"](#).
- When the site administrator is viewing the Customer UI in site Preview mode, this page displays **all** specialty sites that are accessible to the administrator's current session language. See [Section 19.1.2, "Using Preview Mode"](#), for more details.
- The Site Selection Page provides a static link to the Site Home Page, `ibeCZzpHome.jsp`, except in certain deeplink scenarios.

6.2.5 Setting up Site Selection Page Columns

The Site Selection Page can display your specialty sites in multiple columns, or it can display a single drop-list of available specialty sites. The number of columns that displays depends upon the value of the profile option, IBE: Maximum Columns in Specialty Site Page. See [Section A.7.0.41, "IBE: Maximum Columns in Specialty Site Page"](#), for more information on the profile settings.

As a best practice in the case of a multiple-language implementation, you could set up the page with multiple columns. This allows all of the specialty sites and language links to display across the page. To enable the Site Selection Page in multiple columns, set the profile option to an integer greater than zero. It is

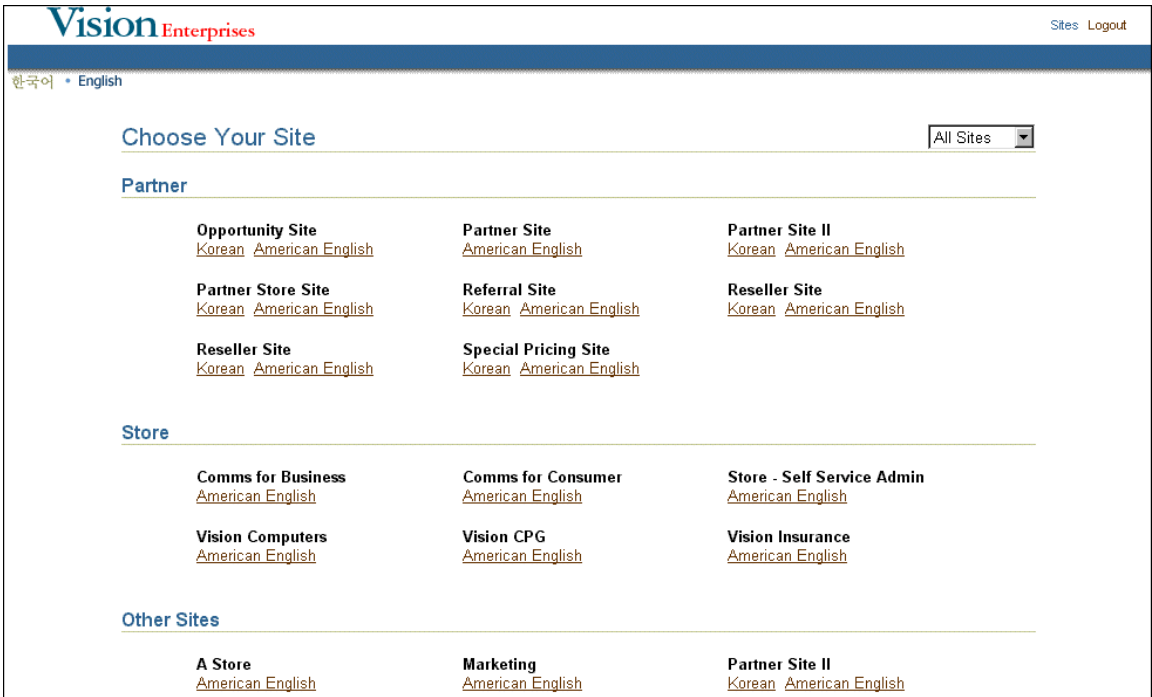
recommended that you set it to a reasonable number of columns for a web page, such as 2 or 3.

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

Important: If you set up the Site Selection Page as a single column, the Group Picker is not shown, nor will the segregated group selection areas be available. This display is not recommended if site grouping is a business requirement.

The following figure, [Figure 6–1, "Site Selection Page in Multiple Columns Example"](#), shows how the Site Selection Page might look in an implementation of Oracle iStore with multiple-columns enabled.

Figure 6–1 Site Selection Page in Multiple Columns Example



6.3 Site Home Page

The Site Home Page is the landing page or first visible catalog page of a specialty site. Out-of-the-box, it is mapped to `ibeCZzpHome.jsp`.

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

- IBE: Use Specialty Sites Selection Page = No
- IBE: Default Specialty Site = <Site ID>

How to find Site ID:

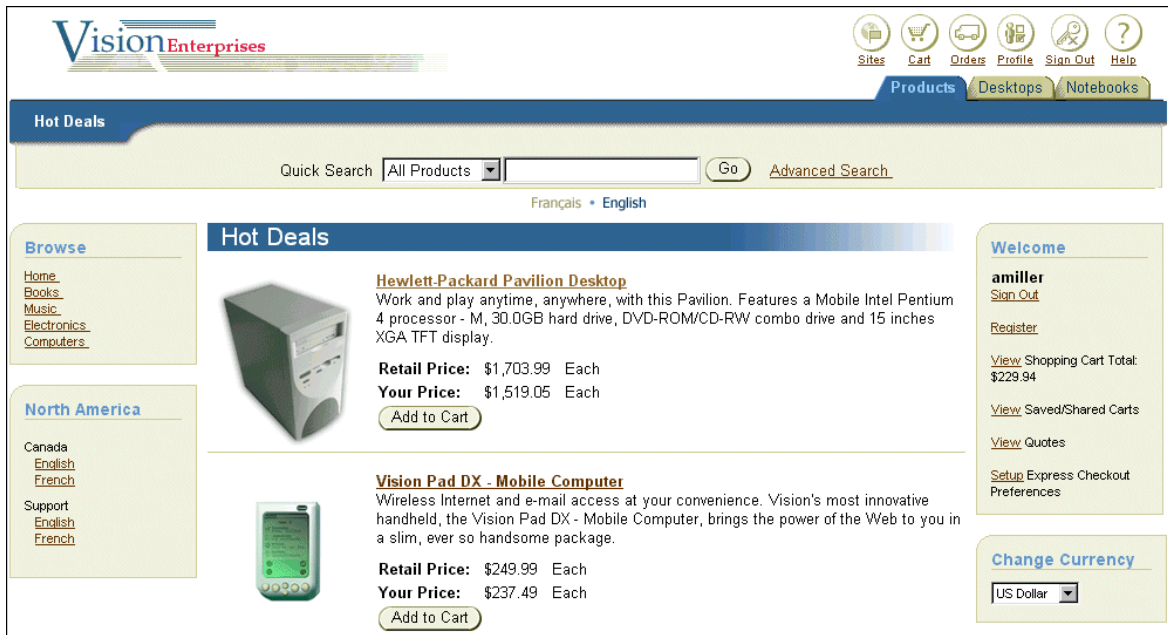
1. Log into the Site Administration UI as iStore administrator.
2. Select the radio button of the site for which you wish to find the ID number.
3. Select Update. In the Update Site: Details page, the Site ID field will display the Site ID number.

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

See also: [Section 6.4, "Initial Landing Page Icons and Other Elements"](#)

The following figure, [Figure 6–2, "Site Home Page Example"](#), is an example of the Site Home Page.

Figure 6–2 Site Home Page Example



6.4 Initial Landing Page Icons and Other Elements

This section discusses the landing page icons and other elements. Topics include:

- Section 6.4.1, "Bins on Site Home Page"
- Section 6.4.2, "Site Selection Page Images"
- Section 6.4.3, "Group Picker"
- Section 6.4.4, "Language Images"
- Section 6.4.5, "Language Links"
- Section 6.4.6, "Language List"
- Section 6.4.7, "Logo Image"
- Section 6.4.8, "Navigation Icons"
- Section 6.4.9, "Quick Search"
- Section 6.4.10, "Specialty Site Picker"

See also: [Section A.3.1, "Foundation Profile Options for HTML UI Setup"](#), and [Section D.11, "Customizing the Style Sheet"](#)

6.4.1 Bins on Site Home Page

The following bins are seeded with content for the Site Home Page:

- [Section 6.4.1.1, "Browse Bin"](#)
- [Section 6.4.1.2, "Global Bin"](#)
- [Section 6.4.1.3, "Welcome Bin"](#)

In addition, you can map group bins to the section of your choice using configurable bin layout. See: [Section 8.10.6, "Group Bins"](#).

You can find more information about configuring bins in [Section 8.10, "Configuring Bin Placement and Content"](#).

6.4.1.1 Browse Bin

The Browse Bin is a navigational bin which by default displays on the left side of the Site Home Page and other section pages. When initially viewed, the bin contains a list of all accessible top-level sections within the accessible specialty sites in your implementation, and allows users to drill down into the sections. When a user selects a top-level section that has navigational subsections, these subsections are then displayed in the bin under their parent section. If a user selects one of the subsections, the bin further restricts its display to only the targeted section and associated subsections.

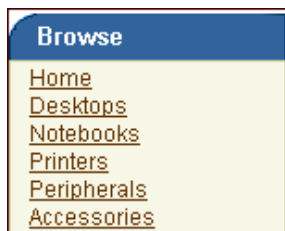
Steps to enable the Browse Bin:

1. Set the profile option, IBE: Use Section Bin, to Yes at the iStore application level. See [Section A.7.0.70, "IBE: Use Section Bin"](#), for more details.

Note: This profile works only if you use Fixed Layout when creating a section. If sections are associated to Configurable Layout, then you should map the bin using Configurable Layout for bins (see [Section 8.10.5, "Using Configurable Bin Layout"](#)).

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

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

Figure 6–3 Browse Bin Example

6.4.1.2 Global Bin

The Global Bin displays by default on the right side of the Site Home Page and other section pages if the current site has multiple currencies enabled. The bin allows customers to select other currencies; when customers select a new currency, item prices are displayed with the newly selected currency.

Important: In order for item prices to display in additional currencies, the items must be set up on a price list in those currencies. See [Chapter 10, "Implementing Pricing"](#), for details.

Steps to enable the bin:

1. Set the profile option, IBE: Use Global Bin, to Yes (see [Section A.7.0.62, "IBE: Use Global Bin"](#)).

Note: This profile works only if you use Fixed Layout when creating a section. If sections are associated to Configurable Layout, then you should map the bin using Configurable Layout for bins (see [Section 8.10.5, "Using Configurable Bin Layout"](#)).

2. Ensure that the template, STORE_GLOBAL_STORE_BIN, has a valid physical JSP mapped to it, which it does by default.
3. Ensure that the user's active responsibility is not Sales Representative (IBE_SALESREP).
4. Ensure that the site where the bin will display has multiple currencies enabled.

Guidelines:

- In order for the Global Bin to display on the **shopping cart** page, the current site must have multiple currencies enabled.
- When the Global Bin is mapped to the shopping cart page, changing currency in the shopping cart page causes cart items to be re-priced in the newly selected currency.

- The Global Bin can be mapped to any Oracle iStore page. However, if you map it to any page except a section page, when the user switches currencies in the bin, the page flow will take the user to the Site Home Page after the user submits the change.

6.4.1.3 Welcome Bin

Enabled by default, the Welcome Bin displays on the right side of the Site Home Page. It displays several elements which are described below.

Steps to enable the bin:

1. Ensure that the profile option, IBE: Use Welcome Bin, is set to Yes (Yes is its default value). See [Section A.7.0.81, "IBE: Use Welcome Bin"](#).
2. Ensure that the bin's template, STORE_CUST_ACC_WELCOME, is mapped to a valid JSP. By default, it is mapped to ibeCAcdWelcome.jsp.

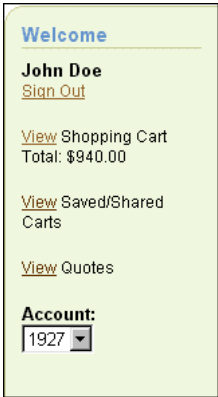
The Welcome Bin displays:

1. **Username** --- Username of the logged in user, or *Guest* if the user is not logged in.
2. **Login/Logout** -- The Login link displays in the bin if the user is not logged in. The Logout link displays if the user is logged in.
3. **View Shopping Cart** -- This link provides access to the user's active cart, the Your Shopping Cart page.
4. **View Saved/Shared Carts** --- This link provides access to saved or shared carts on the My Carts page.
5. **View Quotes** -- This link provides access to the My Quotes page, and only displays if your implementation is integrated with Oracle Quoting. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.
6. **Express Checkout** -- This link displays if you have enabled Express Checkout. It takes users to the Profile > Preferences page, where they can set up their Express Checkout preferences. See [Section 12.4.8, "Express Checkout"](#), for more information.
7. **Account number** -- The current account number for the user displays. If the user has more than one account, an account switcher LOV will display. The account switcher displays account numbers only, not descriptions of the accounts. Note that account numbers will not display for guest users.

Note: The Welcome Bin can be mapped to any Oracle iStore page. However, if you map it to any page except a section page, when the user switches accounts in the bin, the page flow will take the user to the Site Home Page after the user submits the change.

The following figure, [Figure 6–4, "Welcome Bin Example"](#), is an example of how the Welcome bin might display in an implementation of Oracle iStore.

Figure 6–4 *Welcome Bin Example*



6.4.2 Site Selection Page Images

A logical image placeholder is provided next to each specialty site name in the Site Selection Page. The logical media name for displaying these images is: STORE_LOGO_SPECIALTY. There is no default mapping to an image for this logical media. To provide images for the Site Selection Page, map each logical media name at the site level to the image you wish to display. See [Section 9.1, "Content Overview"](#), information on how to map the placeholder to a content file.

The following figure, [Figure 6–5, "Site Selection Page Images Example"](#), shows an examples of images that could be provided for sites in the Site Selection Page. The image placeholders are located to the left of each specialty site name.

Figure 6–5 *Site Selection Page Images Example*



6.4.3 Group Picker

The group picker LOV allows users to filter the groups that display in the Site Selection Page. For an example of how this LOV appears, see [Figure 6–1, "Site Selection Page in Multiple Columns Example"](#).

Note that this picker is not controlled by a profile option. However, if no specialty sites have been assigned to any groups, or if only one group has been used in a grouping assignment, then the picker will not appear.

6.4.4 Language Images

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

- See [Section 9.3, "Understanding Media Objects"](#), for information on how Oracle iStore's Customer UI pages use media objects to display image files.

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

- See [Section 9.3.4, "Assigning Content Items to Media Objects"](#), for steps to map the language files to the media objects.
- For a list of the image files, see [Section 6.4.4.1, "Language Images Seeded Values"](#), below.

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

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

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

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

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

6.4.4.1 Language Images Seeded Values

The following table, [Table 6–1, "Oracle iStore Seeded Language Images"](#), lists the seeded languages for the Language List, along with their language codes and physical media files for the "selected" language images. By default, Oracle iStore sites media files in the OA_MEDIA directory.

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

Table 6–1 Oracle iStore Seeded Language Images

Language	Language Code	Mapped Physical Media for "Selected" Language Images
Arabic	AR	/OA_MEDIA/ibeLangARS.gif
Chinese, Simplified	ZHS	/OA_MEDIA/ibeLangZHSS.gif
Chinese, Traditional	ZHT	/OA_MEDIA/ibeLangZHTS.gif
Danish	DK	/OA_MEDIA/ibeLangDKS.gif
Dutch	NL	/OA_MEDIA/ibeLangNLS.gif
English, U.S.	US	/OA_MEDIA/ibeLangUS.gif
Finnish	SF	/OA_MEDIA/ibeLangSFS.gif
French, Canadian	FRC	/OA_MEDIA/ibeLangFRCS.gif
French, European	F	/OA_MEDIA/ibeLangFS.gif
German	D	/OA_MEDIA/ibeLangDS.gif
Greek	EL	/OA_MEDIA/ibeLangELS.gif
Hebrew	IW	/OA_MEDIA/ibeLangIWS.gif
Italian	I	/OA_MEDIA/ibeLangIS.gif
Japanese	JA	/OA_MEDIA/ibeLangJAS.gif
Korean	KO	/OA_MEDIA/ibeLangKOS.gif
Norwegian	N	/OA_MEDIA/ibeLangNS.gif
Portuguese, Brazilian	NL	/OA_MEDIA/ibeLangNLS.gif

Table 6–1 Oracle iStore Seeded Language Images (Cont.)

Language	Language Code	Mapped Physical Media for "Selected" Language Images
Portuguese, European	PT	/OA_MEDIA/ibeLangPTS.gif
Russian	RU	/OA_MEDIA/ibeLangRUS.gif
Spanish, Latin American	ESA	/OA_MEDIA/ibeLangESAS.gif
Spanish, European	E	/OA_MEDIA/ibeLangES.gif
Swedish	S	/OA_MEDIA/ibeLangSS.gif
Thai	TH	/OA_MEDIA/ibeLangTHS.gif

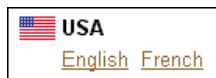
Other seeded media objects for the Language List are:

- **STORE_LANG_IMAGE_DEFAULT** --- If a required language image cannot be found, then a default image appears. The (unmapped out-of-the-box) physical file for this media object is ibeLangALL.gif.
- **STORE_LANG_IMAGE_SEPARATOR** --- This is the media object for the small bullet separator between the languages in the language list. The (unmapped out-of-the-box) physical file for this media object is ibeLangDot.gif.

6.4.5 Language Links

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

The following figure, Language Links Example, shows how the language links might appear on the Site Selection Page.

Figure 6–6 Language Links Example

6.4.6 Language List

The Language List is a list of all supported languages across all sites. It displays automatically when a site or instance supports multiple languages. It allows customers to switch their current session language, which internally changes the site language, if applicable.

Note: If your implementation of Oracle iStore supports only one language, the language list will not display.

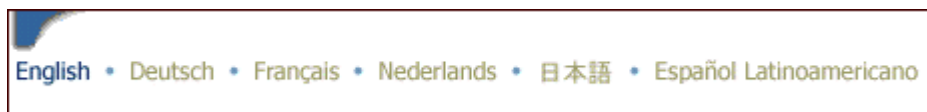
Supported languages are those that have been fully implemented in your instance and enabled in Site Administration UI during setup. See [Section 17.3.2, "Install Languages and Currencies"](#), for information on getting started with multiple languages implementation.

The Language List displays on both the Site Selection Page and the Site Home Page. The list of languages on the Site Selection Page displays all the languages installed in the system. The list on the Site Home Page displays all languages supported by the site.

Each language that displays in the Language List is an image mapped to a media object. The images for the Language List are shipped with the application, but are not by default mapped to their media objects. For the applicable languages, map the images (or use your own custom images) to their media objects. See [Section 6.4.4, "Language Images"](#).

The following figure, [Figure 6–7, "Language List Example"](#), shows how the Language List with mapped language images might appear.

Figure 6–7 *Language List Example*



6.4.7 Logo Image

The logo that displays at the top left of the Site Selection Page is a seeded media object which can be mapped to a specific image. The logical media name is:

- **STORE_LOGO_MAIN** -- Out-of-the-box, this media object's source file, `ibeibeTabLogo.gif`, is mapped to all sites and all languages.

To provide site logos for specific specialty sites and languages, map this logical media name at the site/language level to the image you wish to display. The logo

images will then display on the Site Home Page for the sites/languages you have mapped. Follow the steps in [Section 9.3.4, "Assigning Content Items to Media Objects"](#), to map the content.

See also: [Section A.3.1, "Foundation Profile Options for HTML UI Setup"](#)

6.4.8 Navigation Icons

The following navigation icons display across the top right of the Customer UI pages:

Note: The functionality of these icons is disabled in Preview mode.

- [Section 6.4.8.1, "Cart Icon"](#)
- [Section 6.4.8.2, "Login/Logout Icons"](#)
- [Section 6.4.8.3, "Orders Icon"](#)
- [Section 6.4.8.4, "Register Icon"](#)
- [Section 6.4.8.5, "Sites Icon"](#)

Note: By default, to improve performance, Oracle iStore uses hard-coded images to display icons and menus. You can enable the use of the icon/menu media objects by setting the profile option, IBE: Use Logical Media for Menu Images to Yes (see [Section A.7.0.65, "IBE: Use Logical Media for Images"](#)).

6.4.8.1 Cart Icon

The Cart icon allows users to access cart-related functionality, such as saved carts, shared carts, and quotes. Enabled by default, this icon's appearance can be controlled by the profile option, IBE: Enable Shopping Cart Global Icon (see [Section A.7.0.75, "IBE: Enable Shopping Cart Global Icon"](#)).

Following are the template, media object, message, and default content associations for this icon:

- Template --- STORE_CART_MODIFY, which out-of-box has an All-All mapping to ibeCScdViewA.jsp
- Media Object --- STORE_SEL_CART_IMAGE (for selected state, mapped out-of-box to ibeTabLinkCartS.gif) and STORE_DESEL_CART_IMAGE (for unselected state, mapped out-of-box to ibeTabLinkCart.gif)
- Message --- IBE_PRMT_CART_G; default message displays, "Cart"

6.4.8.2 Login/Logout Icons

These icons show Login or Logout, depending upon whether the user is logged in or not.

- **Login** JSP, media object, message, and default content associations:
 - JSP --- `ibeCAcpSSOLogin.jsp` (not a template, but this JSP will redirect the flow to template `STORE_CUST_ACC_LOGIN` if Single Sign-On is not used)
 - Media Object --- `STORE_SIGN_IN_IMAGE` (for non-selected image); no selected image
 - Message --- `IBE_PRMT_SIGN_IN_G`; default message displays, "Login"
- **Logout** JSP, media object, message, and default content associations:
 - JSP --- `ibeCAcpSSOLogout.jsp` (not a template, but this JSP will redirect the flow to template `STORE_CUST_ACC_LOGOUT` if Single Sign-On is not used)
 - Media Object --- `STORE_SIGN_OUT_IMAGE` (for non-selected image); no selected image
 - Message --- `IBE_PRMT_SIGN_OUT_G`; default message displays "Logout"

6.4.8.3 Orders Icon

The Orders icon allows users access to all order-related functionality, such as Order Tracker, pending express checkout orders, and returns, if these have been enabled by the administrator. Enabled by default, this icon's appearance is controlled by the profile option, IBE: Enable Order Tracker Global Icon (see [Section A.7.0.31, "IBE: Enable Order Tracker Global Icon"](#)).

Following are the template, media object, message, and default content associations for this icon:

- Template --- `STORE_PSI_ORDER_SUMMARY_P`, which out-of-box has an All-All mapping to `ibeCOtdOrdSumMain.jsp`
- Media Object --- `STORE_SEL_ORDER_IMAGE` (for selected state), `STORE_DESEL_ORDER_IMAGE` (for deselected state)
- Message --- `IBE_PRMT_ORDERS_G`; default message displays "Orders"

6.4.8.4 Register Icon

The Register icon is shown if the current user is a guest. It provides a link to the iStore registration page.

Following are the template, media object, message, and default content associations for this icon:

- Template --- STORE_REG_CONTAINER_D, which out-of-box has an All-All mapping to ibeCRgdRegContainer.jsp
- Media Object --- STORE_SEL_CUST_REG_IMAGE (for selected state), STORE_DESEL_CUST_REG_IMAGE (for deselected state)
- Message --- IBE_PRMT_CUST_REG_G; default message displays "Register"

6.4.8.5 Sites Icon

The Sites icon allows access to the Site Selection Page, where a user can select from available sites.

This icon appears when the profile option, IBE: Use Specialty Sites Selection Page, is set to Yes.

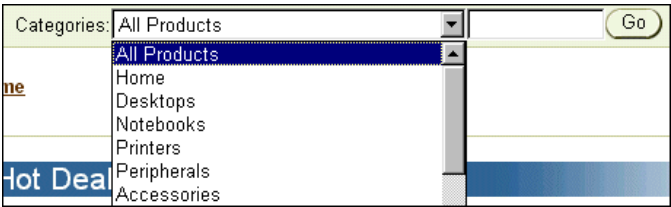
Following are the JSP, media object, message, and default content associations for this icon:

- JSP --- ibeCZzdMinisites.jsp (not a template, but this JSP will redirect to template, STORE_CTLG_MSITE_DISPLAY)
- Media Object --- STORE_SEL_STORE_IMAGE (for selected state, mapped All-All out-of-box to ibeTabLinkStoresS.gif), STORE_DESEL_STORE_IMAGE (for deselected state, mapped All-All out-of-box to ibeTabLinkStores.gif)
- Message --- IBE_PRMT_SITES_G; default message displays, "Sites"

6.4.9 Quick Search

Enabled by default, the Quick Search utility allows users to search the catalog for products. The existence of the Quick Search utility is controlled by the profile option, IBE: Enable Quick Search. The following figure, [Figure 6–8, "Quick Search Example"](#), shows an example of how the Quick Search might appear in an implementation of Oracle iStore.

Figure 6–8 Quick Search Example



For information on how to set up the product search, see [Section 7.9, "Setting up Product Search for the Customer UI"](#).

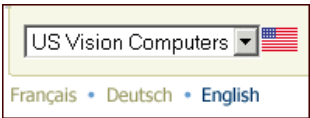
6.4.10 Specialty Site Picker

The Specialty Site Picker is a drop-list of specialty sites which by default displays below the menu tabs on the Site Home Page. It displays all specialty sites within the current group. The Specialty Site Picker is **disabled** by default. To enable the Specialty Site Picker on the Site Home Page, set the profile option, IBE: Use Specialty Site Picker, to Yes. See [Section A.7.0.78, "IBE: Use Specialty Site Picker"](#).

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

The following figure, [Figure 6–9, "Specialty Site Picker Example"](#), shows how the Specialty Site Picker might look in an implementation of Oracle iStore.

Figure 6–9 Specialty Site Picker Example



Implementing Products

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

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

Information on working with the product catalog can be found in [Chapter 8, "Implementing the Catalog"](#).

Main topics in this chapter include:

- [Section 7.1, "Products in Oracle iStore Overview"](#)
- [Section 7.2, "Other Oracle iStore Integrations for Product Deployment"](#)
- [Section 7.3, "Guidelines and Considerations for Oracle iStore Product Setup"](#)
- [Section 7.4, "Providing Regular Available to Promise \(ATP\)"](#)
- [Section 7.5, "Display Options for Units of Measure"](#)
- [Section 7.6, "Translating Product Descriptions"](#)
- [Section 7.7, "Using Product Autoplacement"](#)
- [Section 7.8, "Support for Service Items"](#)
- [Section 7.9, "Setting up Product Search for the Customer UI"](#)

7.1 Products in Oracle iStore Overview

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

In the Site Administration UI, site administrators can view products, perform limited maintenance on products, assign products to site sections, and assign content to products. In the Customer UI, specialty site customers can view the product data and any related media, as well as search for products within the default category set and product organization.

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

Certain Oracle Inventory flags need to be set for Oracle iStore to best utilize product data from Oracle Inventory tables. This chapter's [Section 7.3, "Guidelines and Considerations for Oracle iStore Product Setup"](#), contains best practices for setting up Oracle iStore to use products from Oracle Inventory.

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

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

Optional integration with other Oracle applications can provide additional product functionality. See [Section 7.2, "Other Oracle iStore Integrations for Product Deployment"](#), below, for more information.

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

7.2 Other Oracle iStore Integrations for Product Deployment

You can also integrate Oracle iStore with:

- **Oracle Marketing** to provide expanded product management capabilities, including:
 - Product creation and maintenance using configurable product templates

- Assigning products to organizations
- Assigning products to Inventory categories

After you integrate Oracle iStore with Oracle Marketing, this additional functionality is available in the Site Administration UI. Oracle iStore-Oracle Marketing integration is described in [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#).

- **Oracle Bills of Material** to set up configurable items, model bundles, and items with standard warranties for sale in your sites. See [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#).
- **Oracle Configurator** to enable --- in the Oracle iStore Customer UI --- customer-configured products, guided selling, solution-based modeling, and limited shopping cart validations. See [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#).
- **Oracle Inventory** and **Oracle Service Contracts** to allow serviceable items with attached services (for example, extended warranties) to be sold through the sites. See [Section 7.8, "Support for Service Items"](#).
- **ATP Information** --- Oracle iStore ships with the ability to check the Oracle Inventory ATP columns; the flag is enabled during site creation. You also can integrate with Oracle Advanced Supply Chain Planning for global ATP. See [Section 7.4, "Providing Regular Available to Promise \(ATP\)"](#), and [Section 21.2.1, "Setting up Global Available to Promise \(ATP\)"](#).

7.3 Guidelines and Considerations for Oracle iStore Product Setup

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

Topics in this section include:

- [Section 7.3.1, "Products Retrieved From a Single Inventory Organization"](#)
- [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#)
- [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#)
- [Section 7.3.4, "Categories Lists and Site Administration UI Behavior"](#)
- [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#)

7.3.1 Products Retrieved From a Single Inventory Organization

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

7.3.1.1 Specifying Default Inventory Organization and Operating Unit

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

The MO: Operating Unit profile option can be set at application, responsibility, or user level. The product search in Oracle iStore's Site Administration UI will retrieve products based on the setting of this profile option at the lowest level to which it is set, with user level being the lowest. Note that if you are integrating Oracle iStore with Oracle Marketing's product screens, then special instructions are available in [Section 26.4, "Implementing Oracle Marketing Products Integration"](#).

- See [Section A.2, "How to Set Profile Options"](#), for information on the level hierarchy of Oracle Applications profile options.
- For more information on multi-org setups, see [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#).

In addition, within the default Inventory Organization in your implementation, the Oracle iStore product repository is further restricted to a single Oracle Inventory category set, as discussed in [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#).

7.3.2 Inventory Categories and the iStore Product Catalog

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

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

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

Oracle iStore uses the profile option, IBE: Category Set, to identify the default category set for its products. This category set typically will have multiple categories. The default category set contains all of the products that potentially make up your online product catalog in the Customer UI. This category set also comprises the product repository in the Site Administration UI.

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

To define default, category-level display rules for your sites, you can link each category (within the default category set) to an Oracle iStore Display Style -- either a seeded, default Display Style, or a new Display Style that you map to the category in the Advanced > Display Styles pages. See [Section D.5, "Using Display Styles for Default Display"](#), for details.

7.3.2.1 Setting the Category Set Profile Option

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

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

7.3.3 Required Inventory Flags for Oracle iStore Products

Several Oracle Inventory flags must be set for products that will be sold through the sites. Set these in the Oracle Inventory Master Item form for each product -- including each component in a configured item -- that you plan to sell in a site:

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

Note: Oracle Inventory allows users to set a Web Status of Disabled. Products in status Disabled cannot be queried in the Site Administration UI nor assigned to

sections. Setting a product's Web Status to Disabled in Inventory will make products disappear in both the Site Administration and Customer UIs.

- **Orderable on the Web** --- Available in the Master Item form's Web Option tab, this flag enables the Checkout button. You cannot set this flag in the Site Administration UI. If this flag is not enabled, a product will display in the Customer UI, but a customer will be unable to check out with it. Note that this flag is not considered for children of a configured item.

Note: If the item is already part of an outstanding transaction (e.g., item is in the cart), but the Web Orderable flag for the item is No, the user should not be allowed to checkout with the cart. User can remove that item and then proceed to checkout.

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

7.3.4 Categories Lists and Site Administration UI Behavior

In lists of categories in the Site Administration UI, Oracle iStore shows only leaf categories containing products. Leaf sections are described in [Section 7.7.2, "Categories Map to Leaf Sections"](#).

This behavior impacts the Site Administration UI in the following ways:

- For leaf categories to show up in category LOVs, they must be associated with products. Implementers must ensure that categories they expect to utilize in the Site Administration UI contain products.
- The UI effect occurs in the following menus:
 - Catalog > Sections > Categories
 - Catalog > Relationships

- Advanced > Categories
- Stale data can occur for associated categories whose products are removed. For example, if Category 1 containing products is associated to Section 1 in the Sections > Categories menu, and then all of the products are removed from Category 1, the category-section association still exists -- but the category will no longer be viewable in the Categories LOV.

7.3.5 How Oracle iStore Product Fields Map to Oracle Inventory Fields

In Oracle iStore, product fields do not map identically to the Oracle Inventory fields from which they are derived. The following table, [Table 7-1, "Oracle iStore-Oracle Inventory Item Field Mapping"](#), shows the field mappings.

Table 7-1 Oracle iStore-Oracle Inventory Item Field Mapping

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

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

7.4 Providing Regular Available to Promise (ATP)

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

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

For information on enabling global ATP for Oracle iStore, see [Chapter 21, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#).

7.4.1 High-Level Steps to Set up Regular ATP

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

1. Set up ATP in Oracle Manufacturing.
2. Define ATP sourcing rules in Oracle Inventory.
3. Enable products for ATP by setting their ATP and ATP component flags.
4. In the Site Administration UI Create/Update Site page, activate the Allow customers to check item availability checkbox. See [Section 5.2.1, "Create a Site: Getting Started and Entering Basic Information"](#).

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

7.5 Display Options for Units of Measure

For Oracle iStore products, you can determine whether all or only primary units of measure (UOMs) are displayed in the Customer UI.

To determine UOM display, set the profile option, IBE: Retrieve All Units of Measure for an Item, at iStore application level, to either Yes or No:

- Yes --- For each product, all UOMs and all prices will be displayed.
- No --- For each product, only the primary UOM and prices are displayed. In this case, the primary UOM must be defined in a valid price list accessible by the user.

The default value is No.

Important: If setting IBE: Retrieve All Units of Measure for an Item, set the profile option IBE: Retrieve Price When Displaying Item, to an opposite value.

7.6 Translating Product Descriptions

Each product in Oracle Inventory has a name and description. In order for your products to display in a non-base language, you must create translated product

descriptions. You can do this using the Site Administration UI. When you create short and long product descriptions, Oracle iStore associates them with the language in which the Site Administration UI is currently rendered.

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

You can use the following procedure.

Prerequisites

- Multiple organization architecture has been implemented.
- Additional languages have been implemented.

See [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#), for information on fulfilling these prerequisites.

Steps

1. Launch the Site Administration UI and select the Preferences icon. The Oracle CRM Technology Foundation user profile page opens.
2. Change your language display preference to the language into which you want to translate product descriptions.
3. Select Sign Out to log out of the application.
4. Launch the Site Administration UI again. The Site Administration UI displays in the newly selected language.
5. In the Catalog > Products tab, enter product descriptions. See [Section 8.9.3, "Updating Product Details"](#), for steps. The translations you enter here are associated with the language of the Site Administration UI display.
6. Log out.
7. The translated product descriptions should now display in sites that carry the products and support the specified language.

For more information, see [Section 17.3, "Implementing Globalization with Oracle iStore"](#).

7.7 Using Product Autoplacement

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

Topics in this section include:

- [Section 7.7.1, "Autoplacement Available for Leaf Sections Only"](#)
- [Section 7.7.2, "Categories Map to Leaf Sections"](#)
- [Section 7.7.3, "Running Product Autoplacement Concurrent Program"](#)
- [Section 7.7.4, "Product Autoplacement Examples"](#)
- [Section 7.7.5, "Product Autoplacement Concurrent Program Log"](#)

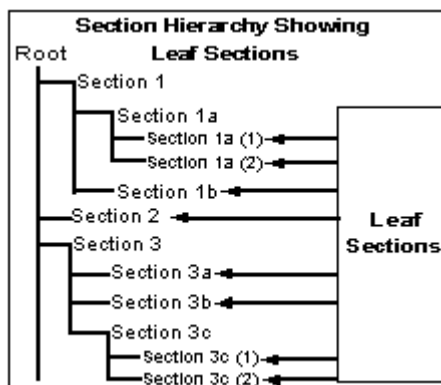
See also: [Section 7.3.4, "Categories Lists and Site Administration UI Behavior"](#)

7.7.1 Autoplacement Available for Leaf Sections Only

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

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

The following diagram, [Figure 7-1, "Section Hierarchy Showing Leaf Sections"](#), illustrates the leaf section concept.

Figure 7-1 Section Hierarchy Showing Leaf Sections

7.7.2 Categories Map to Leaf Sections

The autoplacement process matches Oracle iStore leaf sections to Oracle Inventory categories within the default category set specified in the profile option, IBE: Category Set. You must map the leaf sections to categories, as described below.

Note that category assignment is not mandatory. You can always manually select products for any section. When you run the concurrent program, you insert parameters that tell the program which sections and products are candidates for the autoplacement program. The category-section associations that you define determine which categories' products get populated into (or removed from) the sections. [Section 7.7.3, "Running Product Autoplacement Concurrent Program"](#), for details.

Categories and sections have a many-to-many relationship -- e.g., you can assign a single category to any number of sections; likewise, a single section can have any number of assigned categories. A warning message will display if you attempt to assign a non-leaf section to a category.

Additional Category LOV behavior is described in [Section 7.3.4, "Categories Lists and Site Administration UI Behavior"](#).

7.7.2.1 Steps to Map Leaf Sections to Categories

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

2. In the Catalog Hierarchy page, select the radio button of the leaf section which you wish to map to a category. Select Update. The Update Section: Details page displays, showing details of the section you have selected.
3. Select the Categories hyperlink. The Update Section: Categories page displays. If you have chosen a non-leaf section, a warning message will display.
4. Select Assign Categories. The Search and Select: Categories page displays. Search for categories, using the percent (%) sign as a wildcard if desired. Available categories will be those within the default category set defined in the profile option, IBE: Category Set.
5. In the Search and Select: Categories page, use the Select checkboxes to select the categories you wish to assign to the section. You may select multiple categories.
6. Press the Select button to save your selections. The Update Section: Categories page reappears, with the categories you have chosen listed in the Categories table.

7.7.3 Running Product Autoplacement Concurrent Program

After you have created the desired mappings between your leaf sections and Oracle Inventory categories, you must run the iStore Product Autoplacement Concurrent Program to populate the sections with products. You also can instruct the concurrent program to run in Replace mode, and it will update existing products as well as remove products which no longer match the category-section mappings.

For generic instructions on how to run concurrent programs, see [Section B.12, "Running Concurrent Programs"](#).

7.7.3.1 Autoplacement Program Parameters

The following are the parameter settings available in the iStore Product Autoplacement Concurrent Program:

- **Run Immediately or Schedule** --- The concurrent program can be run immediately after you enter the parameters or scheduled to run at a later time.
- **Append (add) or Replace actions** --- You can specify if the autoplacement program only **adds** products to sections, or also **removes** products that no longer meet the criteria for inclusion in the sections.
 - **Append action** --- When you use this option, products are always added to sections, but the program never removes products from sections that no longer match the current category-section mapping assignments.

- **Replace action** --- When you use this option, products are always added to sections, and replaced with "fresh" products if necessary. The products which no longer meet the criteria for inclusion in the leaf section are removed.
- **Target section** --- Use this field to specify the start section for the concurrent program. The target section can be a leaf section or non-leaf section. This parameter is combined with the next parameter on the screen, **Include the subsections of the target section**; possible values: Yes/No. The tandem activity of these two fields is as follows:
 - If the target section is a leaf section and the *Include the subsections of the target section* field is set to Yes, the concurrent program will only perform autoplacement for the target section. This is because if the target section is a leaf section, it will have no subsections.
 - If the target section is a leaf section and the *Include the subsections of the target section* field is set to No, the concurrent program will only do autoplacement for the target section.
 - If the target section is a non-leaf section and the *Include the subsections of the target section* field is set to Yes, the concurrent program will find the leaf subsections under the target section and perform the autoplacement on all of these leaf sections.
 - If the target section is a non-leaf section and the *Include the subsections of the target section* field is set to No, the concurrent program will not do the autoplacement. This is because you cannot autopopulate a non-leaf section.
- **Evaluation or Execution modes** --- The program can be executed in one of two modes:
 - **Evaluation** -- When you run the program in this mode, **only the concurrent program output** is populated with the information about assignment, reassignment, replacement, or removal. Since the autoplacement does not actually take place, this allows you the opportunity to view the results of the program before committing the products to the autoplacement program.

To view the concurrent program output: Use the View Request screen in Oracle Forms. After the request is submitted, in Oracle Forms select View > Requests to retrieve the View Request screen. Input the request ID to see a specific request. On the View Request screen, select the View Output button to view the output of the concurrent request.

- **Execution** -- In this mode, the products are actually assigned, replaced, or removed in the leaf sections that you specify, according to the current category-section mappings.
- **Product Name** and **Product Number** fields --- Use these field to narrow the scope of the concurrent program. You can enter partial values, using the percent (%) sign as a wildcard if desired. For example, if you enter `t%` in the Product Name field, the program will only use products which begin with the letter `T`. The default value for these two parameters is all products (%).
- **Product Publish Status** --- You can select either published, unpublished, or all products:
 - To make only published products candidates for the program, select Published.
 - To make only unpublished products candidates for the program, select Unpublished.
 - To include products of all statuses, select All.
- **Product Creation Dates** --- You can select products whose **creation dates** match the parameters you enter:
 - In the Product start creation date field, enter the start date in the format: DD-MON-YYYY.
 - In the Product end creation date field, enter the end date.

7.7.4 Product Autoplacement Examples

This section contains product autoplacement examples.

Example 1

1. **Section 1** is a leaf section. In the Site Administration UI Product pages, you have assigned the following products to Section 1:

Product 1

Product 2

2. **Category 1** in Inventory has been assigned the following products:

Product 1

Product 3

Product 4

3. **Category 2** in Inventory has been assigned the following products:
Product 2
4. In the Site Administration UI **Update Section: Categories** page, you assign:
Category 1 ----> Section 1
5. In Oracle Forms, you start the iStore Product Autoplacement Concurrent Program, using the following parameters:
 - a. **Autoplacement Mode** = EXECUTION
 - b. **Product Assignment Mode** = APPEND
 - c. **Target Section** = Section_1
 - d. **Include subsections of the target section** = No
 - e. **Product Name** = Product % (% is a wildcard)
 - f. **Product Number** = %
 - g. **Product Publish Flag** = ALL
 - h. **Product Start Creation Date** = undefined
 - i. **Product End Creation Date** = undefined
6. You execute the concurrent program. When the program is finished, **Section 1** will contain the following products:
Product 1
Product 2
Product 3
Product 4

This assignment takes place because Category 1 is linked to Section 1 and the products it contains (Product 1, Product 3, Product 4) match the search criteria of the concurrent program.

Example 2

1. Using the product placement definitions in Example 1, you execute the concurrent program in the following mode:
 - a. **Autoplacement Mode** = EXECUTION
 - b. **Product Assignment Mode** = REPLACE

- c. **Target Section** = Section_1
 - d. **Include subsections of the target section** = No
 - e. **Product Name** = Product % (% is a wildcard)
 - f. **Product Number** = %
 - g. **Product Publish Flag** = ALL
 - h. **Product Start Creation Date** = undefined
 - i. **Product End Creation Date** = undefined
2. You execute the concurrent program. When the program is finished, **Section 1** will contain the following products:
- Product 1
- Product 3
- Product 4
- Product 2 is removed from Section 1, as Product 2 is not in Category 1 that is linked to Section 1. Product 3 and Product 4 are added to Section 1.

7.7.5 Product Autoplacement Concurrent Program Log

When you run the autoplacement program, the output log of the concurrent program shows the following:

- **Date** --- Date the program was executed
- **Mode** --- Whether the program was run in evaluation or execution mode
- **Preferences** --- Either *Add and remove product associations* or *Add product associations* only, depending upon the parameters selected
- **Starting Section** --- Starting section name
- **Select subsections** --- Either Yes or No, depending upon the parameters selected
- **Product selection** --- From <date> to <date>
- **Product name** --- Product filter entry, if any; for example TOY%
- **Web publish Status** --- Published or Unpublished

- **Details table** --- A table showing the following product numbers and product names, whether the products were added or removed, and the section names and section codes of the sections where the products were added or removed

7.8 Support for Service Items

Oracle iStore supports selling serviceable items and their related services in the Customer UI. In the Site Administration UI, merchants can set up serviceable items and related services (for example, extended warranties) and offer them for sale in the sites. Oracle iStore also supports adding services to configured items and adding multiple services to a single serviceable item.

Service items and serviceable items must be defined in Oracle Inventory before the merchant can include them in site sections using the Site Administration UI. After they have been set up, the products display to web customers in the Customer UI.

Main topics in this section include:

- [Section 7.8.1, "Service Items Support Key Terms and Definitions"](#)
- [Section 7.8.2, "Service Items Catalog and Shopping Cart Display"](#)
- [Section 7.8.3, "Implementing Service Items Support"](#)
- [Section 7.8.4, "Customizing Oracle iStore to Link Services to Oracle Install Base Items"](#)

7.8.1 Service Items Support Key Terms and Definitions

Key terms related to service items support are defined below:

- **Serviceable item** -- Serviceable items represent saleable products, spare parts, subassemblies, and components. In Oracle Inventory's Master Item form, the Serviceable Product attribute in the service attribute group is used to flag items as *serviceable*.
- **Service item** or **service** -- This term refers to a service (e.g., an extended warranty) which relates to a serviceable item. Services are items defined in the item master that determine the coverage terms that are given or sold to a customer. For a service item, the Unit of Measure must be time-based, since a service is to cover a set period of time. Service products can be defined in two categories: warranties and extended warranties. Throughout this document, we will use *service* or *service item* to represent extended warranties only. The terms *service* and *service item* are equivalent.

- **Warranties** -- These are services automatically included with the purchase of a product. Since these services are associated with serviceable items in Oracle Bills of Materials (BOM), they generally are given to the customer free of charge, because the price is assumed to be included in the price of the associated product.
- **Extended warranties** -- These are services that may be purchased in addition to a product, and are not included in BOM for the serviceable item. Extended warranties have unit-based or percentage-based pricing.

See the *Oracle Inventory User's Guide* and the *Oracle Service Contracts Concepts and Procedures* for complete details.

7.8.2 Service Items Catalog and Shopping Cart Display

In the Site Administration UI, site administrators can assign serviceable items to site sections, just as with any standard item. In the Customer UI, specialty site customers can view serviceable items in the catalog, and can view the services available for serviceable items, in the product detail page. The product detail page lists the services available, with selectable radio buttons. Oracle iStore seeds a display template for this purpose, the Product Detail with Services template.

Customers can add services from the catalog pages or the shopping cart. In the product summary view in the catalog, there is no difference in the display of the serviceable items versus non-serviceable items.

Additional Points:

- Customers cannot purchase a service by itself -- services only can be purchased in combination with their related serviceable items.
- Oracle iStore supports only primary UOMs for service items.

Main topics in this section include:

- [Section 7.8.2.1, "Shopping Cart Display"](#)
- [Section 7.8.2.2, "Add Service Page"](#)
- [Section 7.8.2.3, "Service Detail Display"](#)
- [Section 7.8.2.4, "Multiple Services for a Single Item"](#)
- [Section 7.8.2.5, "Configured Items"](#)
- [Section 7.8.2.6, "Product Search"](#)
- [Section 7.8.2.7, "Express Checkout"](#)

- [Section 7.8.2.8, "Item-Level Shipping"](#)

7.8.2.1 Shopping Cart Display

Following is the behavior in the shopping cart for serviceable items and their related services:

- A service that has been added to a shopping cart appears as a separate line item in the cart -- it displays in the line *beneath* its related serviceable item, indented slightly from the left side of the cart table.
- An icon appears next to services in the cart (for an example, see the icon next to the 1 Year Silver Warranty Plan service in [Figure 7-2, "Shopping Cart Display of Serviceable Item and Related Service"](#), below). When users hover the mouse over the icon, the mouse-over text will display which serviceable product the service is associated to.
- By selecting the *Add Service* hyperlink under a serviceable product, customers can drill down into the serviceable item details, replacing the service being purchased, if desired, or adding an additional service.
- Note that while generating the *Add Service* hyperlink, Oracle iStore does not check if any services are defined for the serviceable item.
- The quantity of a service item in the cart will display in the cart, but cannot be updated -- it is read-only and will always reflect the quantity of the associated serviceable product.
- Users can delete a service by itself -- a Delete icon appears next to services in the cart.
- If a customer deletes a serviceable item which has a related service in the cart, the system deletes the service as well.
- Serviceable items are not merged, regardless of the setting of the merge items profile, IBE: Merge Shopping Cart Lines.
- Services cannot be added to a shopping list. If a cart has a serviceable product and related service in it and the customer presses Add to List, then only the serviceable product will be added to the shopping list. The customer will need to manually add the service to the cart when he moves the serviceable items to a cart.

The following figure, [Figure 7-2, "Shopping Cart Display of Serviceable Item and Related Service"](#), shows an example of an active shopping cart with a serviceable

item, its related service product underneath it, and the *Add Service* hyperlink to add or select another service for the item.

Figure 7–2 Shopping Cart Display of Serviceable Item and Related Service

Hewlett-Packard Pavilion Desktop + Add Service	Each	<input type="text" value="1"/>
VAT (Rate:17.5%)		
1 Year Silver Warranty Plan ⓘ	Year	1

7.8.2.2 Add Service Page

When customers select the *Add Service* hyperlink from the shopping cart to add or change a service, the Add Service page for the item appears.

- **Add Service Template** --- The add service display is accomplished through the use of the Product Detail with Services Display Template. See [Section 8.7, "Product Display Templates"](#), for more information about this template.

Below the item information, a Service(s) area lists applicable services. List (Retail/List) and net/discount (Your Price) prices are also shown. When a user navigates to this page, *None* will always be the default value selected.

The following figure, [Figure 7–3, "Add Service Page Example"](#), shows an example of the Add Service page for an item.

Figure 7–3 Add Service Page Example

Add Service For 8GB Hard Drive

To buy services, select available service(s) and click "Select">

Cancel

Select

Service(s)

	Retail Price	Your Price
<input type="radio"/> 1 Year Silver Warranty Plan	\$120.00	\$99.00
<input type="radio"/> 2 Year Gold Warranty Plan	\$80.00	\$60.00
<input type="radio"/> 3 Year Platinum Warranty Plan	\$60.00	\$50.00
<input checked="" type="radio"/> None		

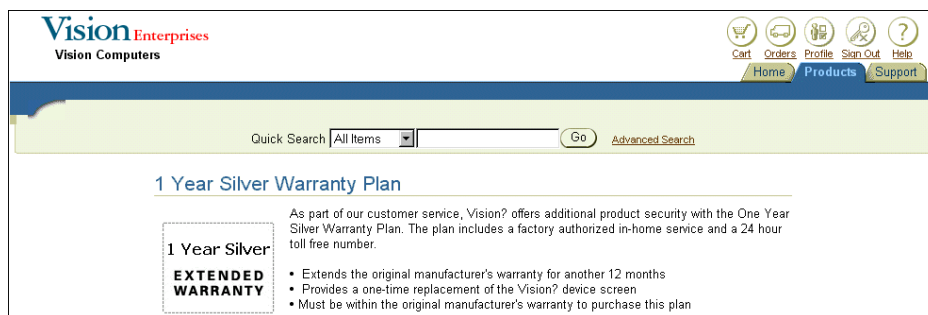
Note that if a serviceable item is selected from the shopping cart, this page will not display the Add to Cart (*Easy way to shop*) bin.

7.8.2.3 Service Detail Display

By selecting the hyperlinks of the services, customers can further drill down into the details of a particular service associated to the product.

The following figure, [Figure 7-4, "Service Detail Page Example"](#), shows an example of how the detail of a service would display in the service detail page.

Figure 7-4 Service Detail Page Example



The text for this page is derived from the setup of the item description in Oracle Inventory.

7.8.2.4 Multiple Services for a Single Item

From the Add Service page (as shown in [Figure 7-3, "Add Service Page Example"](#)), customers can select multiple services for an item, if the profile option, IBE: Enable Multiple Services, is set to Yes. Note that customers cannot select multiple services at the same time, but rather must add a service, then re-navigate to the Add Service page and select an additional service. If the profile is set to No, then Oracle iStore will replace an existing service with any additional service added. See [Section A.7.0.29, "IBE: Enable Multiple Services"](#), for additional guidelines on setting the profile.

Adding Multiple Services Process Flow

Following is the process flow for adding multiple services:

1. The customer selects Add Service from the shopping cart.
2. In the Add Service page, the customer selects the radio button of the desired service and presses the Add Service button.

3. From the shopping cart, the customer selects the Add Service link for the same item (as in step 1), and is taken to the Add Service page.
4. When the customer selects another service from the list, the service is added to the cart in addition to the existing service.
5. The customer can continue adding services as desired. Note that a single service can be added multiple times to the same serviceable item.

7.8.2.5 Configured Items

Merchants can offer services for configured items in the same way that they can for standard serviceable products. Note that, in this section, the terms *configured item* or *configurable item* also encompass model bundles.

Note: This functionality requires integration with Oracle Configurator and Oracle Bills of Material. See [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#), and [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#), for more information about these products.

In the catalog and shopping cart pages, serviceable configured items display in much the same way as standard service products, but with some differences, as discussed below. For configured items, customers will see the following links:

- **Reconfigure** -- This link always displays for any configurable item, whether serviceable or non-serviceable. Users can launch the Oracle Configurator UI to reconfigure the item if desired.
- **Add Service** -- This link displays for all serviceable items, whether configurable or not. For configurable items, this link displays if a configurable item or any of the components of the configured item are serviceable. Selecting this link leads to a page showing all components of the configured item, as well as an Add Service link for all serviceable items or components. Customers can view the service items beneath the corresponding serviceable component. Service items are indented to the right with an icon after the service item name.
- **Details** -- Only the Details link will appear if the configurable item is non-serviceable; users can select this link to view configuration details.

Following are examples of the different ways that configured and standard serviceable and non-serviceable items display in the shopping cart.

- Sample Item 1 --- Sentinel Custom Desktop is a non-serviceable configurable item -- therefore, it displays only the Details and Reconfigure links. The Details link shows the configurable item and its current configuration. The Reconfigure link allows users to reconfigure the item in the Oracle Configurator UI.

- Sample Item 2 --- Another configurable version of the Sentinel Custom Desktop is a serviceable item -- therefore, it also displays the Add Service link, in addition to the Reconfigure link.
- Sample Item 3 --- Vision Pad DX Mobile Computer is a non-configurable, serviceable item -- therefore, it displays only the Add Service link.
- Sample Item 4 -- Envoy Deluxe Laptop is a non-configurable bundle item that is serviceable -- therefore, it displays the Details link and Add Service link.

The following figure, [Figure 7-5, "Shopping Cart Display of Configurable Serviceable Items Example"](#), shows an example of how configurable serviceable items display in the shopping cart.

Figure 7-5 Shopping Cart Display of Configurable Serviceable Items Example

	AS66311	Sentinel Custom Desktop	Each	<input type="text" value="1"/>
		Reconfigure Details / Add Service		

When customers select the Add Service link for a configurable item, the Add Service page displays the configurable item and all components, with Add Service links for any serviceable components. The following figure, [Figure 7-6, "Add Service Page for Configurable Item"](#), shows an example of the Add Service page for a configurable item with serviceable components.

Figure 7-6 Add Service Page for Configurable Item

Add Service For Sentinel Custom Desktop							
							Done
Delete	Part Number	Item	UOM	Quantity	Unit Price	Total Price	
	CM76840	Sentinel Custom Desktop + Add Service	Each	1	\$999.00	\$999.00	
	CM76841	Drive Option Class + Add Service	Each	1	\$00.00	\$00.00	
	CM76842	Disk Drive Option Class	Each	1	\$00.00	\$00.00	
	CM76843	Floppy Drive - 1.44 MB - 3.5"	Each	1	\$38.00	\$38.00	
	CM76844	CD - Option Class + Add Service	Each	1	\$00.00	\$00.00	
	CM76845	CD-ROM - 20X + Add Service	Each	1	\$38.00	\$38.00	
	CM76846	DVD-RW - 2X + Add Service	Each	1	\$38.00	\$38.00	
	CM76847	Hard Drive Option Class + Add Service	Each	1	\$00.00	\$00.00	
	CM76848	8GB Hard Drive + Add Service	Each	1	\$38.00	\$38.00	
	CM76849	RAM Option Class	Each	1	\$00.00	\$00.00	
	CM76810	RAM - 128 MB	Each	2	\$38.00	\$38.00	

When customers select the Add Service link for one of the components of the configurable item, the Add Service page displays all services available for the component. For an example of this page, see [Figure 7–3, "Add Service Page Example"](#).

Add Service Template for Configurable Items

For configurable products, the Add Service page is derived from the logical template, `STORE_CART_SVA_CFG_ITEM`, and not the logical template discussed in [Section 7.8.2.2, "Add Service Page"](#).

7.8.2.6 Product Search

Service items are available in product search results, with the following behavior:

- Available in the Site Administration UI with the following restrictions:
 - Products have been set up correctly in Oracle Inventory and flagged according to Oracle iStore product flag rules
- Available in the Customer UI, with the following restrictions:
 - Product search for the Customer UI has been implemented
 - Service has been associated to a section within the site; if the service item is merely associated with a serviceable product, it won't be shown in the search result.
 - Service items retrieved in the search do not show the association to serviceable items

Note: Customers cannot purchase a service by itself -- service items only can be purchased in combination with their related serviceable items.

For more information about the product search in Oracle iStore, see the [Section 7.9, "Setting up Product Search for the Customer UI"](#).

7.8.2.7 Express Checkout

Customers can use Oracle iStore's Express Checkout feature to order serviceable products and their related services. On the product detail page, when customers select the service and press the Express Checkout button, both items are added to the express checkout queue, and the system submits them just as it would with any other express checkout order.

For more about Oracle iStore's Express Checkout feature, see the [Section 12.4.8, "Express Checkout"](#).

7.8.2.8 Item-Level Shipping

Serviceable items are available for item-level shipping just as any other site item -- however, the services related to a serviceable item are not available for separate item-level shipping instructions. The shipping address associated with a service will always be associated with the related serviceable item's address.

For more information about the item-level shipping in Oracle iStore, see [Section 11.5, "Setting up Item-Level Billing"](#).

7.8.3 Implementing Service Items Support

Following are the steps to set up Service Items for Oracle iStore:

- [Step 1 - Set up Serviceable Items and Services](#)
- [Step 2 - Set up Pricing for Service Items](#)
- [Step 3 - Set up Oracle Service Contracts](#)
- [Step 4 - Set Profile Options](#)
- [Step 5 - Add Serviceable Items to Site Section\(s\)](#)
- [Step 6 - Associate Serviceable Items to Display Template](#)

7.8.3.1 Step 1 - Set up Serviceable Items and Services

Following are high-level steps to set up the applicable items as serviceable and as services.

1. In Oracle Inventory Master Items form, flag the serviceable items as serviceable.
2. In Oracle Inventory Master Items form, set up the related services.
3. If you are using related pricing for the items (see [Section 7.8.3.2, "Step 2 - Set up Pricing for Service Items"](#)), set up item relationships.
4. Ensure that the required Oracle iStore-specific flags as discussed in [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#).

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

7.8.3.2 Step 2 - Set up Pricing for Service Items

Just as with any product, pricing must be defined for the service items. You can define the price for a given service item in one of two ways:

1. Set up a standalone price for the service item.

2. Define a related price, which depends on the price of the serviceable product. For example, if the price of a computer is set up as \$100, the merchant can set up the price of the service item to be 50% of the computer's price, which is \$50.

If you are using related pricing, then you must set up the relationships between the serviceable products and services.

The following sections contains steps for these two procedures.

Defining a Standalone Price for a Service Item

You may use the following procedure to define a standalone price for a service item:

Steps

1. Log into Oracle (Forms) Applications.
2. From the Responsibilities menu select Oracle Pricing Manager > Price Lists > Price List Setup.
3. Search for the price list in which you want to define the price of the service item.
4. Search for the service item by its part number under List Lines > Product Value.
5. Enter the price (without the currency sign) in the List Lines > Value field.

Defining a Price for a Service Item as a Percentage of a Serviceable Item Price

You may use the following procedure to define a price for a service item as a percentage of a serviceable item's price:

Steps

1. Log into Oracle (Forms) Applications.
2. From the Responsibilities menu select Oracle Pricing Manager > Price Lists > Price List Setup.
3. Search for the service item by its part number under List Lines > Product Value.
4. Under List Lines > Application Method, select Percent.
5. Enter the percentage (without the percent symbol) in the List Lines > Value field.

6. Next, associate the service items with a specific serviceable product in Inventory, so that it knows which parent product the percentage is based on. In other words, an Inventory relationship between them must be defined.
7. **Prerequisites:** Serviceable product must be created using Oracle Inventory. Service item must be created using Oracle Inventory.
8. From the Responsibilities menu select, Inventory > Items > Item Relationships.
9. Search for the serviceable product by the part number in the From field.
10. Search for the service item by the part number in the To field.
11. In the Type field, select *Service* from the drop down list.
12. Save the changes.

7.8.3.3 Step 3 - Set up Oracle Service Contracts

This section assumes you have implemented Oracle Service Contracts. Post-implementation, in Oracle Service Contracts, set up:

- Coverage Templates
- Exclusion Rules

The following sections contain high-level steps to accomplish these tasks. For complete information, please refer to the Oracle Service Contracts documentation.

Set up Coverage Templates

Set up the coverage templates for the services and serviceable items. In order to instantiate a coverage when creating service contract lines, at least one coverage template must be created and linked to the service items defined in Oracle Inventory. The number of coverage templates should reflect the number of coverages that are applicable to the types of coverages offered.

Set up Exclusion Rules

Note that this is an optional step; however, a new service item generally will be available to **all serviceable products** unless an exclusion rule is set up for the item.

In Oracle Service Contracts, set up the exclusion rules between the service items and the serviceable products.

Note: The Generally Available flag determines whether the entries in Product and Party tabs are inclusions or exclusions. By selecting the Generally Available checkbox for a service, all products and parties listed will be excluded from

receiving that service. By leaving the Generally Available checkbox unselected, the products and parties listed will be the only ones eligible to receive that service.

The examples below can assist you in setting up exclusion rules -- note that these actions are performed in Oracle Service Contracts.

Example 1: Make a Service Available to all Serviceable Products or all Parties, but Define Exceptions by Party or Serviceable Product

To make a service generally available to all of the serviceable products except certain ones, or to make a service generally available to all parties except certain ones, do the following in Oracle Service Contracts:

(In this example, the sample exceptions are: Serviceable Product A and Party B.)

1. Check the **General Available** box under the **Product** tab and enter the part number of Serviceable Product A in the **Exception** list.
2. Check the **General Available** box under **Party** tab and enter the account number of Party B in the **Exception** list.

Example 2: Make a Service Available to Only Certain Serviceable Products or to a Specific Party by Defining Inclusions

To make a service only available to a specific serviceable product or products, or to a certain party or parties, do the following in Oracle Service Contracts:

(In this example, the inclusions are: Serviceable Product A and Party B.)

1. Uncheck the **General Available** box under the **Product** tab and enter the part number of Serviceable Product A in the **Exception** list.
2. Uncheck the **General Available** box under the **Party** tab and enter the account number of Party B in the **Exception** list.

You may use the following procedure to set up the exclusion rules:

Steps

1. Log into Oracle (Forms) Applications and select Service Contracts Manager responsibility.
2. From the Responsibilities menu, select Setup > Contract > Service Availability.
3. Search for the service item by its part number.
4. Check or uncheck the General Available box (see the examples above for more specific information).

5. Enter your party exclusion or serviceable product exclusion.

Note: In Oracle Forms, the default responsibility used for setting up Service Contracts is Service Contracts Manager.

See *Oracle Service Contracts Concepts and Procedures* for complete setup details.

7.8.3.4 Step 4 - Set Profile Options

Set the following profile options:

1. **IBE: Use Item Level Service** --- Set to Yes. See [Section A.7.0.63, "IBE: Use Item Level Service"](#).
2. **OM: Cascade Service** --- Must be set to No. If set to Yes, and a customer adds a service to a model item, when the order is processed in Oracle Order Management, the added service will be added to every component in the model. Refer to *Oracle Order Management Suite Implementation Manual* for details.
3. **IBE: Enable Multiple Services** -- Set to Yes or No according to business requirements. See [Section A.7.0.29, "IBE: Enable Multiple Services"](#).
4. **IBE: Use Customer Service Exclusion** -- Set to Yes if using party exclusion rules in Contracts; otherwise, set to No. Set at application level. See [Section A.7.0.59, "IBE: Use Customer Service Exclusion"](#).

7.8.3.5 Step 5 - Add Serviceable Items to Site Section(s)

In Oracle iStore, add the serviceable items to your site section(s). Follow the steps in [Section 8.8, "Creating and Maintaining Sections"](#).

Note: There is no need to associate the service items with site section(s), as they will be picked up automatically through their association with the serviceable item.

However, for search to work for these items, you must associate the service items with sections; see [Section 7.8.2.6, "Product Search"](#).

7.8.3.6 Step 6 - Associate Serviceable Items to Display Template

In Oracle iStore, associate serviceable items to the product Display Template, Product Detail with Services. See [Section 8.7.0.7, "Product Detail with Services"](#), for details about this template.

Implementers also may wish to select a Display Template for the service items. If no Display Template is associated with a service, then the default product template, Product Detail with Image, will be used.

Note: When associating a serviceable item with a Display Template in the Products > Display Template page, the Product Detail with Services template will only display in the template gallery if the product being viewed is a serviceable product. Oracle iStore checks the status of the Serviceable Product flag (shown in the of the Define Items form in Inventory).

For instructions on how to associated Display Templates to products, see [Section 8.9, "Maintaining Products in Sections"](#).

7.8.4 Customizing Oracle iStore to Link Services to Oracle Install Base Items

You can customize Oracle iStore at the API level to link services added in the catalog to an Oracle Install Base item. The API can be used when a serviceable item is purchased at the same time as a service, or when a service is later added to an existing install base item.

To provide the API-level support, customize the UI to make the instance id available to the customer through some logical representation. Once this UI is built, the API could then be used to facilitate the purchase of a service item to be tied to the install base instance ID. Refer to `ibeCScpAddToCart.jsp` page for an example of how to use the APIs. See [Section 7.8.4.1, "Sample Code for Linking Install Base Item with Services"](#), below for sample code.

Note: When attempting to tie a service item to an Install Base item, Oracle Order Capture (ASO) validates the instance ID passed in against `CSI_ITEM_INSTANCES` table.

7.8.4.1 Sample Code for Linking Install Base Item with Services

The following sample code can assist your setup of this functionality. This sample code will instantiate a `ShoppingCart` object, instantiate a "placeholder parent" item, and then instantiate the service item that is to be tied to the install base line:

```
// instantiate the cart & set the cartid, if any
ShoppingCart shopCart = new ShoppingCart();
if (cartId != null) shopCart.setCartId(cartId);
// instantiate the placeholder parent item
ShoppingCartItem []shopCartItem = new ShoppingCartItem[1];
ServiceItem []serviceItem = new ServiceItem[1];
shopCartItem[0] = new ShoppingCartItem();
```

```
shopCartItem[0].setOperationCode(ShoppingCartItem.NOOP_
OPCODE);

//instantiate the service item
serviceItem[0] = new ServiceItem();
serviceItem[0].setInventoryItemId(itemId);
serviceItem[0].setQuantity(quantity);
serviceItem[0].setOrganizationId(organizationId);
serviceItem[0].setUom("YR");
serviceItem[0].setItemTypes(ShoppingCartItem.SERVICE_ITEM_
TYPE);
serviceItem[0].setServicePeriod("YR");
serviceItem[0].setServiceDuration("1");

// serviceItem[0].setStartDateActive("02-MAY-2003"); defaulted
in plsql

// The next two lines are the key differences from a normal
add service.

// As the service reference type is "CUSTOMER_PRODUCT", it
will not be validated against another quote line as a normal
service item would. This type value is usually defaulted to
"QUOTE" for the normal case of adding a service line to
another shopping cart line.

serviceItem[0].setServiceReferenceType(ServiceItem.REFTYPE_
CUST_PROD);

// Second, where the user might normally set a quote line id,
for this purpose, they would use the install base line id
(gotten from other logic) to be set as the service ref line
id.

serviceItem[0].setServiceReferenceLineId(installbaselineId);
shopCartItem[0].setServiceItems(serviceItem);
shopCart.setShoppingCartItems(shopCartItem);
shopCart.addItemToCart();
cartId = shopCart.getCartId();
```

```
// in case we ended up 'creating' a cart
```

7.9 Setting up Product Search for the Customer UI

Oracle iStore's product search functionality allows customers to search the Customer UI product inventory. The product search is restricted to the site that the customer is logged in to. Customer UI product search in Oracle iStore is implemented using:

- Oracle Inventory tables
- The interMedia text search utility of the Oracle8i database
- The concurrent program, iStore Search Insert

Topics in this section include:

- [Section 7.9.1, "Customer UI Product Search Process Flow"](#)
- [Section 7.9.2, "Product Search Dependencies"](#)
- [Section 7.9.3, "Special Characters and Reserved Words in the Search"](#)
- [Section 7.9.4, "Setting Up Oracle Inventory for Product Search"](#)
- [Section 7.9.5, "Setting Customer UI Search Profile Options"](#)
- [Section 7.9.6, "Running the iStore Search Insert Concurrent Program"](#)
- [Section 7.9.7, "Populating the Section-Level Search Table"](#)
- [Section 7.9.8, "Enabling Fuzzy Searches"](#)
- [Section 7.9.9, "Enabling Synonym Searches"](#)
- [Section 7.9.10, "Creating Search Index Tables"](#)
- [Section 7.9.11, "PL/SQL, Java, and JSPs Involved in Search"](#)
- [Section 7.9.12, "Customizing Search"](#)
- [Section 7.9.13, "Adding Stopwords to Searches"](#)

7.9.1 Customer UI Product Search Process Flow

Following is the process flow for product search in the Customer UI.

1. The product information (part number, description, and long description) is first loaded in an Oracle iStore table (IBE_CT_IMEDIA_SEARCH) via the concurrent program, iStore Search Insert.

This step is generally performed after the merchant has loaded products into Oracle Inventory.

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

The core text on which the search is performed is stored in a Clob called INDEXED_SEARCH. It stores a concatenation of part number, name, and description of products. The table also stores inventory_item_id, organization_id, category_id, category_set_id, and the web status field from MTL_SYSTEM_ITEMS_B table.

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

2. Once the data is loaded, any change to product information is updated in the Oracle iStore table IBE_CT_IMEDIA_SEARCH through a database trigger call on the appropriate Inventory table.

This keeps product information current in the search table.

3. Once the data is moved into the search table, the interMedia index is created to facilitate keyword searches.

Note: Searching by languages is enabled by launching the iStore Search Insert program in the enabled language.

7.9.2 Product Search Dependencies

Following are the dependencies to product search for the Customer UI:

- **Oracle Inventory** --- You must ensure that Oracle Inventory is installed and configured properly before setting up the Customer UI product search. Refer to Oracle Inventory implementation documentation for details on how to set up Oracle Inventory for product searching. Product search also requires the 11*i* version of the Oracle Inventory schema.
- **Oracle interMedia Text** --- You must ensure that Oracle interMedia Text is installed and configured properly before setting up the Customer UI product search. Refer to the Oracle interMedia Text documentation for details on how to set up and configure interMedia Text.
- **Oracle Database** --- The product search requires version 8.1.7 of the Oracle database with the Oracle interMedia Text option installed. You can enable either

category-level or section-level searches from the Customer UI Site Home Page pull-down menu.

7.9.3 Special Characters and Reserved Words in the Search

When your customers search in the Customer UI, there are some Oracle interMedia Text restrictions when using reserved words and special characters in a "contains" search string. Following is a brief list --- for a complete list of special characters and reserved words, see the Oracle interMedia Text documentation.

7.9.3.1 Special Characters

- _ (underscore)
- - (hyphen)
- & (ampersand)
- ? (question mark)
- \$ (dollar sign)
- * (asterisk)
- ; (semi-colon)
- | (pipe symbol)
- () (parentheses marks)
- ~ tilde symbol

7.9.3.2 Reserved Words

- NT
- AND
- ABOUT
- ACCUM
- MINUS
- NEAR
- OR

Oracle iStore can handle special characters and reserved words if you enclose each search string with brackets { } or use forward slash marks / --- this is known as escaping the characters.

Following are some examples:

1. If you have special characters:

Example:

CBX-AM100-234 --- For this value, you could search by entering this:

CBX/-AM100

2. If you have special characters with wildcards:

Example:

CBX_AM100-234 --- For this value, you could search by entering this:

CBX/-A%

3. If you have reserved words:

Example:

NT --- For this value, you could search by entering this:

{NT}

AND --- For this value, you could search by entering this:

{AND}

4. For a normal search string:

To search not using any special characters or reserved words, just enter the search string normally.

Example:

laptop --- For this value, just put in the search string as in:

laptop

Note: Even though the wildcard % is a reserved character in Oracle interMedia Text, for the Customer UI product search, if using this wildcard, there is no need to put brackets around the search string.

7.9.4 Setting Up Oracle Inventory for Product Search

First, set up your inventory under a common Master Organization. Points to remember while setting up your inventory include:

- Give products unique names.
- Do not leave category names (concatenated segments) blank or non-unique. They can be null or non-unique in the database, but show as blanks or appear multiple times in the Categories LOV.
- Make sure the products have Web Status set to **Published** in the Master Item form. See [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#). You can also query this field by examining the web_status column of the item in the MTL_SYSTEM_ITEMS table.

7.9.5 Setting Customer UI Search Profile Options

Oracle iStore search requires that several iStore profile options be set. For profile option descriptions and recommended values, see: [Section A.9, "Customer UI Product Search Profile Options"](#).

7.9.6 Running the iStore Search Insert Concurrent Program

To populate the search table used in the category-level product search, you must run the iStore Search Insert program one time. Thereafter, the table is updated through a database trigger call on the Inventory table.

Prerequisites

- The profile option, IBE: Use Category Search, is set to Yes at the iStore application level.
- The profile option, IBE: Use Synonym Search, must be set to No at the iStore application level, if the thesaurus file is not uploaded.
- Optionally, set the profile option, IBE: Category Set Filter for Product Search.
- Optionally, set the profile option, IBE: Web Status Filter for Product Search.

See [Section A.9, "Customer UI Product Search Profile Options"](#), for more information on the profile options.

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs responsibility.

2. Select Single Request and select OK. The Submit Request window opens.
3. From the Name LOV, select iStore Search Insert.
4. Select Submit to start the concurrent request. Note the request ID.

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

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

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

Once the request is complete, you can search for products based on part number, name, and description. The pull-down search menu on the Customer UI Site Home Page lists categories with publishable items, within the default category set. If additional product attributes are to be added in the search, this SQL script needs to be modified to add the extra search column.

7.9.7 Populating the Section-Level Search Table

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

Since the iStore Search Insert program can populate product data based on the category set profile value (IBE: Category Set Filter for Product Search), the section refresh program also populates product data into the IBE_CT_IMEDIA_SEARCH table, when necessary for product search. The profile option, IBE: Use Category Search, is used by iStore to determine whether product searches in the Customer UI are filterable by section or product category. The iStore Section Refresh concurrent program checks the value of IBE: Use Category Search. If it is set to No (meaning iStore is using section search rather than category search), **and** if the IBE: Category Set Filter for Product Search profile option is set to a specific category set, a query will be run to populate the IBE_CT_IMEDIA_SEARCH table with published

products that are not in the specific category set but which are linked to iStore sections. This allows section data population in addition to category set data population when a specific category set is being used for data population.

Prerequisites

- Set the profile option IBE: Use Category Search to No.
- The profile option, IBE: Use Synonym Search, must be set to No at the iStore application level, if the thesaurus file is not uploaded.

Steps

1. Follow the procedure outlined in [Section 7.9.6, "Running the iStore Search Insert Concurrent Program"](#), to load data into the main search table IBE_CT_IMEDIA_SEARCH.
2. In the iStore Concurrent Programs Responsibility, choose Single Request and select OK. The Submit Request window opens.
3. Choose iStore Section Search Refresh from the Name LOV.
4. Click Submit to start the concurrent request. Note the request ID.

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

Once the request is complete, the pull-down search menu on the Site Home Page lists the top level sections, not the product categories.

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

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

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

If you are setting up category-level search, follow the steps in [Section 7.9.6, "Running the iStore Search Insert Concurrent Program"](#).

If you are setting up section-level search, follow the steps in [Section 7.9.7, "Populating the Section-Level Search Table"](#).

7.9.8 Enabling Fuzzy Searches

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

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

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

Fuzzy search is currently not supported for Japanese language implementations.

7.9.9 Enabling Synonym Searches

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

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

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

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

Prerequisites

Set the profile option **IBE: Thesaurus File Name** to an existing file that must be present in the file system.

Steps

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

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

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

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

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

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

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

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

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

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

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

Synonym search is now available.

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

7.9.10 Creating Search Index Tables

To be able to run external procedures to create a search index table, please ensure that ENV5 is included in your SID_DESC part of listener.ora as follows.

Steps

1. Go to 8.1.7 ORACLE_HOME:

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

This directory should contain listener.ora.

2. Verify that listener.ora contains the following:

```
(SID_DESC =
  (SID_NAME = PLSExtProc)
  (ORACLE_HOME = /u04/visora/8.1.7)
  (ENV5 = LD_LIBRARY_PATH=/u04/visora/8.1.7/ctx/lib)
  (PROGRAM = extproc)
)
```

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

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

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

4. Go to 8.1.7 ORACLE_HOME:

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

This will set up 8.1.7 ORACLE_HOME env.

5. Run the following command:

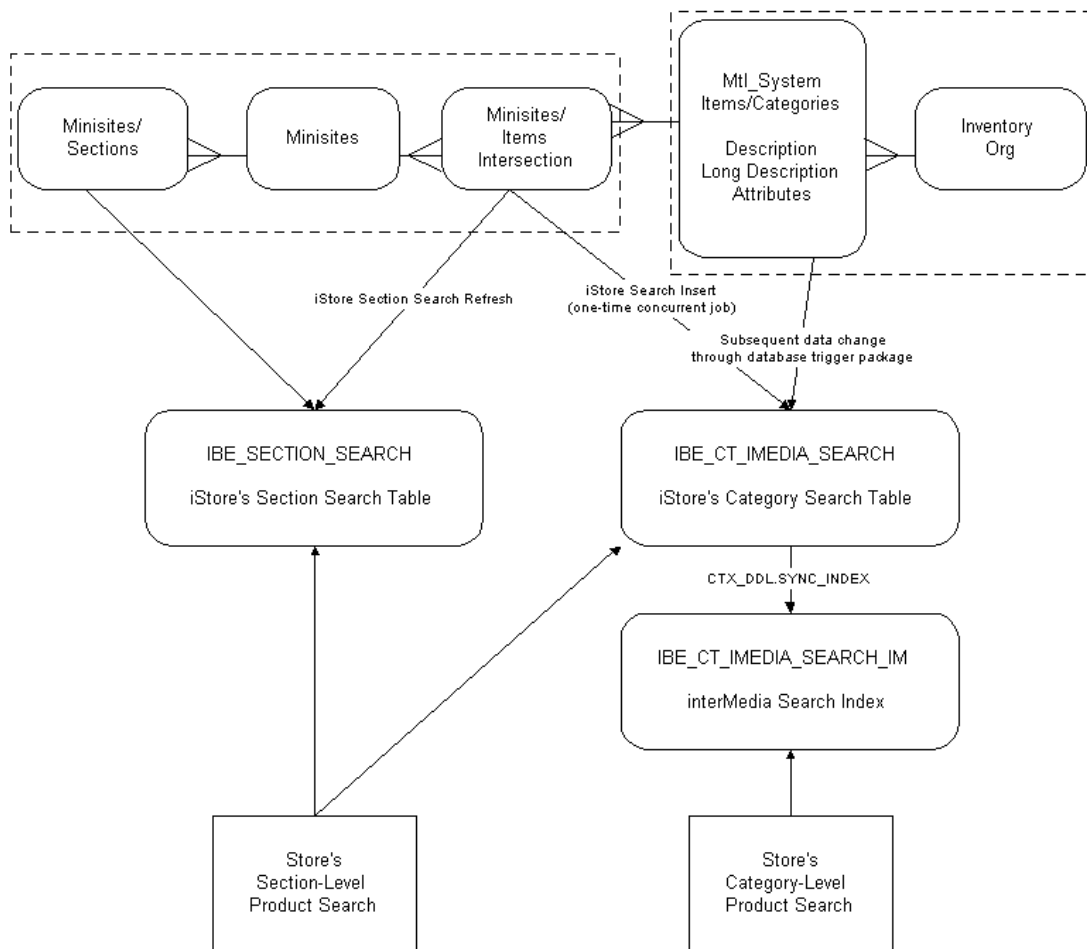
```
ctxsrv -user ctxsys/ctxsys&
```

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

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

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

The following diagram, [Figure 7-7, "Oracle iStore Search Tables"](#), shows the tables involved in the product search.

Figure 7-7 Oracle iStore Search Tables

7.9.12 Customizing Search

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

1. Modify the search package (IBEVCSKS.pls and IBEVCSKB.pls) for adding the additional product search attributes. By default, only the part number, product

name (description column), and product description (long description column) are included in the search.

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

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

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

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

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

7.9.13 Adding Stopwords to Searches

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

common keywords can be excluded from the search by using the "Stop Words" utility in interMedia.

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

Implementing the Catalog

This chapter contains information on implementing the Customer UI product catalog in Oracle iStore 11*i*, including creating the section hierarchy and adding products to the sections.

Main topics in this chapter include:

- [Section 8.1, "Understanding Customer UI Page Display"](#)
- [Section 8.2, "Display Templates Overview"](#)
- [Section 8.3, "Catalog Overview"](#)
- [Section 8.4, "Understanding Section Display"](#)
- [Section 8.5, "Section Templates Overview"](#)
- [Section 8.6, "Section Templates"](#)
- [Section 8.7, "Product Display Templates"](#)
- [Section 8.8, "Creating and Maintaining Sections"](#)
- [Section 8.9, "Maintaining Products in Sections"](#)
- [Section 8.10, "Configuring Bin Placement and Content"](#)
- [Section 8.11, "Mapping Source Files to Display Templates"](#)
- [Section 8.12, "Using Product Relationships"](#)
- [Section 8.13, "Setting up Section Display Templates Text Messages"](#)

8.1 Understanding Customer UI Page Display

Oracle iStore utilizes JavaServer Pages (JSPs), 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 Site Home Page, `ibeCZzpHome.jsp`) that calls other JSPs to display the various areas of the page. Oracle iStore uses templates and other components to present the Customer UI, including:

- **Display Templates** --- The bulk of the Customer UI display is presented through the hundreds of Display Templates that are seeded in Oracle iStore. Display Templates are of various types, depending upon which areas of the Customer UI they are meant to display. See [Section 8.2, "Display Templates Overview"](#), for more information.
- **Section and Product Hierarchy** --- Using sections and their products organized into a hierarchical structure, your product catalog is presented through a powerful section and product catalog building tool. See [Chapter 8, "Implementing the Catalog"](#), for more information.
- **Content** --- Oracle iStore features flexible and reusable content tools. To present product images and HTML content in your specialty sites, you map content components to media objects, which are in turn linked to the content files. To present messages, you utilize hundreds of seeded text messages, some of which also are reusable media objects. See [Section 9.1, "Content Overview"](#), for more information.
- **Display Styles** --- Display styles can be linked to default templates and used to determine default page layout based on Oracle Inventory product categories. See [Section D.5, "Using Display Styles for Default Display"](#), for more information.

Although many customers do customize Oracle iStore, given the application's range of configuration options, customizing is not necessary. See *Oracle iStore API Reference Guide* for customizing information.

8.2 Display Templates Overview

This section contains general information on Display Template functionality within Oracle iStore. Topics include:

- [Section 8.2.1, "Display Templates Present the Customer UI"](#)
- [Section 8.2.2, "Display Template Characteristics"](#)
- [Section 8.2.3, "Creating New Display Templates"](#)

- [Section 8.2.4, "Importing or Exporting Display Template Mappings"](#)

For steps detailing how to map source files to templates, see [Section 8.11, "Mapping Source Files to Display Templates"](#).

8.2.1 Display Templates Present the Customer UI

Oracle iStore is supplied with over 800 Display Templates that present the Customer UI pages. In addition, you can create your own templates for use in the sites. Each template has a specific display purpose, depending upon which element of the customer-facing application it displays. The template categories are known as *Applicable To* categories in the Site Administration UI.

In order for a Display Template to present an element of the Customer UI, it must link to a source file --- this is where its content comes from. This source file typically is a Java Server Page (JSP). The seeded Display Templates that present the default Customer UI are linked to source JSPs. Other templates are left without source JSP files, so that you can configure your own Customer UI presentation with your own source JSPs.

Many of Oracle iStore's Display Templates can call logical media objects and content components to present image and HTML content. These can be any type of image file, such as .gif, .jpg, .bmp, etc., or HTML content in the form of .htm files. Some of the Display Templates present this type of content by calling seeded content components that are located within them. To map content, you must link content components to a logical media object, which you in turn map to the physical source content file (ex.: .gif, .htm, etc.). Each Display Template, depending upon its usage, contains the programmatic access names of specific content components. It uses these programmatic access names to call the components. Other Display Templates can call media objects directly. Some section Display Templates can understand content as well. See [Chapter 9, "Implementing Content"](#), for more information.

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

8.2.2 Display Template Characteristics

Display Templates have the following features:

- **Display Name** -- This is the template's name, to be used for your internal business purposes. The template name appears in the Site Administration UI, but cannot be seen in the Customer UI.

- **Programmatic access name** -- This is a unique code used by template processing pages to determine what to do with the template. The template programmatic access name appears in the Site Administration UI, but cannot be seen in the Customer UI.
- **Source files** -- Each template used in the Customer UI must have a source JSP mapped to it for each site/language mapping for which it will be used. The source JSP determines the content of the page area covered by the template.
- **Description** -- This is an internal description, meant for your own business purposes, that provides information about the use of the template. The template description appears in the Site Administration UI, but cannot be seen in the Customer UI.
- **Keywords** -- After you enter them in the system, keywords can be used to search for templates in the Site Administration UI. These keywords cannot be seen by customers.
- **Applicable To** -- The *Applicable To* designation of a template is a display category that describes its purpose.

A complete list of templates can be found in [Appendix E, "Display Templates and Media Objects"](#).

8.2.3 Creating New Display Templates

You also can register your own templates to link with your own JSP files, in order to customize the presentation of the Customer UI display. See [Appendix D, "Advanced Display"](#), for details.

Note: During upgrades, Oracle iStore does not alter custom templates and their JSP mappings -- nor does it overwrite mappings of JSP files to specific site-language combinations.

8.2.4 Importing or Exporting Display Template Mappings

Oracle iStore's Display Template Mappings Import/Export functionality for Template Manager allows you to transfer template mappings between instances using XML files. See [Section D.3, "Display Template Mappings Import and Export"](#), for details.

8.3 Catalog Overview

The catalog you build using Oracle iStore's sections and products allows you organize your sites into hierarchal sections with products, and to re-use the sections, their products, and any associated content, in one or multiple sites. You also can choose to exclude specific sections, subsections, or products from sites.

In combination with the Display Templates, your site sections --- connected in a parent-child fashion --- help determine the browsing path for the customer in your Customer UI specialty sites. All driven from the main Root section, together the sections, subsections, and products in your sites form a tree-like structure with which you organize and present your product catalog.

The majority of section-product creation and maintenance tasks are performed using the Sections and Products pages accessible within the Catalog tab in the Site Administration UI.

Using the Sections pages, you can:

- Create sections
- Duplicate existing sections, including all products and content
- Assign Display Templates to sections to determine the layout of the sections
- Assign products to sections -- either automatically or manually
- Assign or exclude sections to/from site(s)
- Preview sections in the context of the specialty site(s) in which they appear
- Delete sections
- Rename sections
- Use the search utility to search for sections

For more information on products, see [Section 8.9, "Maintaining Products in Sections"](#), and [Chapter 7, "Implementing Products"](#).

Topics in this section include:

- [Section 8.3.1, "Implementing Sections"](#)
- [Section 8.3.2, "Catalog Hierarchy Guidelines and Behavior"](#)
- [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#)
- [Section 8.3.4, "Section Statuses: Published or Unpublished"](#)
- [Section 8.3.5, "Product Statuses: Published or Unpublished"](#)

See also:

- [Section 8.4, "Understanding Section Display"](#), for an introduction to section display concepts.
- [Section 8.5, "Section Templates Overview"](#), for information on the section Display Templates.
- [Section 8.7, "Product Display Templates"](#), for information on the product Display Templates.
- [Section 8.8, "Creating and Maintaining Sections"](#), for instructions on working with sections.
- [Section 8.10, "Configuring Bin Placement and Content"](#), for information about how you can place bins along the sides, tops, and bottoms of several types of center display pages.
- [Section D.8, "Understanding Catalog Flow"](#), and [Section D.9, "Customizing Section Templates"](#), for information about customizing the catalog flow and templates.

8.3.1 Implementing Sections

In your initial implementation, the section hierarchy will consist of a single parent node, called Root. To this single node, you can add as many subsections as you wish, as long as you follow certain rules for section type (see [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#)). Your products "hang" upon the sections and subsections of the hierarchal tree.

Each site points to a single node of the section hierarchy. This node is known as the site's *root* section -- the site root section can be either the main (initial) Root node or one of the other main or subsections that you create. In the specialty sites that include the section, the sites' navigation is driven from the first top-level section in the hierarchy.

8.3.2 Catalog Hierarchy Guidelines and Behavior

Consider the following guidelines and behavior when building the section-product hierarchy:

- Set up the top-level sections in the section hierarchy first. See [Section 8.8, "Creating and Maintaining Sections"](#), for steps.
- Each top-level section will have the main Root node as its parent.

- For each top-level section, you can create as many subsections as you wish. Each subsection also can have as many other subsections as you wish, as long as you follow the rules for section types; see [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#), for these rules.
- When assigning a parent section to a site, do not choose unpublished or non-active sections, as this will cause incorrect rendering in the Customer UI. If you wish to make a site unavailable to customers, end-date the site.
- In the Customer UI, the Site Home Page will display the first navigational subsection under the Root section, not the root section page itself.
- To present Featured sections on the Site Home Page, make them subsections of the first Navigational subsection.
- If the root section has both navigational and featured subsections, the featured subsection won't be displayed in catalog pages.
- You can create groups of featured products at any level in the hierarchy by creating a subsection of type Featured in a Navigational section and then adding products to that Featured section.
- You can assign individual products one-at-a-time to sections in the Products pages, and you can add a single or multiple products to a section at one time, using the Sections pages. See [Section 8.9.4, "Adding Products to Sections Using the Products Pages"](#), and [Section 8.8.3, "Adding Products to Sections Using the Sections Pages"](#), for details.
- You also can use the autoplacement functionality to populate Leaf sections with products from Inventory categories. See [Section 7.7, "Using Product Autoplacement"](#), for details.
- The top-level sections appear as tabs across the top of the Customer UI web site, and second-level sections appear as subtabs and in the Browse Bin. The number of tabs and subtabs that appear can be controlled by setting profile options. See [Section 8.4.1, "Section and Product Display Profile Options"](#), for details.
- A Navigational section containing a Featured subsection and other subsections shows the products in the Featured section in the middle of the page and the other subsections in the Browse Bin.
- If a section contains only products, it lists the products in the middle.
- A Navigational section can contain either products or subsections, but not both. A Featured section can only contain products. See [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#), for details.

- Products will not appear in the Customer UI unless you publish them in a published section appearing in a published site. Also, the effective dates of the products, sections, and sites must be valid to appear in the Customer UI.

You can find more information in the following sections:

- [Section 8.3.5, "Product Statuses: Published or Unpublished"](#)
- [Section 8.3.4, "Section Statuses: Published or Unpublished"](#)
- [Section 5.2.1, "Create a Site: Getting Started and Entering Basic Information"](#)

8.3.3 Section Types: Featured, Navigational, and Leaf

Site sections are of two basic types: Featured and Navigational. A third category, Leaf, can be of either main type, depending upon its placement in the hierarchy. See below for details.

Featured section:

- Appears on the home page of its parent section
- Contains products only
- Cannot have subsections

Navigational section:

- Appears as a hyperlink in the browsing map of its parent section -- users must select the section hyperlink to view the section
- Can contain products or subsections, but not both

Leaf section:

Within these two types, a section also can be characterized as a **leaf** section. Following are the leaf section characteristics:

- The leaf section is always the ending section or sections on a hierarchy branch, and thus never has subsections.
- The leaf section can be a Featured or a Navigational type of section.
- The leaf section's main purpose is for usage with Oracle iStore's Product Autoplacement feature.

Note that a leaf section is a logical definition, and not a section attribute that you can define in Oracle iStore.

See [Section 7.7, "Using Product Autoplacement"](#), for more details.

8.3.4 Section Statuses: Published or Unpublished

Before a section is available to customers in the Customer UI, you must flag the section as Published and save the changes. Unpublished sections cannot be seen by customers.

- **Published section:**

- Section and any **published** child sections or products are visible in both the Customer UI and Site Administration UI. In the Site Administration UI, the site administrator uses Preview mode to preview a section and its child sections in the context of a specialty site.

Note: In Preview mode, only specialty sites which support the administrator's current session language will display. See [Section 19.1.2, "Using Preview Mode"](#), for more information.

- When publishing a section, the *Apply status to all descendant sections* checkbox in the Create/Update Section page enables you to publish the current section and all descendant sections (but not products) at the same time.

- **Unpublished section:**

- Unpublished sections and all child sections or products are **not** visible in the Customer UI, unless being viewed by the site administrator (i.e., a user logged in with the iStore Administrator or equivalent responsibility).
- Sections and all child sections or products (whether published or unpublished) also are viewable by the administrator through the use of Preview mode (selecting the Preview button in Site Administration UI pages).

8.3.5 Product Statuses: Published or Unpublished

While working with the product catalog, you can determine whether or not to change the status of an Oracle Inventory product to Published or Unpublished. Only Published products are able to display in the Customer UI, unless the site administrator is using Preview mode.

Setting a product's Published/Unpublished status in the Oracle iStore Site Administration UI is the same as changing the product's Web Status setting in Oracle Inventory.

Below are the definitions of the two Oracle iStore product statuses:

- **Published products** ---- Only Published products can display in the Customer UI, unless the site administrator is using Preview mode. Remember that a Published product also must be: (1) listed in at least one Published section, and (2) that section is in an active site accessible to a user.
- **Unpublished products** ---- An Unpublished product is not available in the Customer UI to end users. It will display, however, in Preview mode.

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

8.4 Understanding Section Display

Sections and their associated products display in the Customer UI in the context of the Display Templates in which they appear. All of the section templates appear in the center of the Customer UI screen. In addition to the Display Templates, section appearance is affected by the structure of your section hierarchy, any section-product associations, any content you have associated to a section or product, and any bins configured for the pages.

For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

8.4.1 Section and Product Display Profile Options

Several profile options control how sections and products appear in the specialty site sections. These are discussed in this section.

8.4.1.1 Setting the Number of Home Page Tabs and Subtabs

Top-level sections of a site's root node become tabs across the top of the Site Home Page. The second-level sections become the subtabs across the top of the Site Home Page.

The number of tabs and subtabs is controlled by these profile options:

- **IBE: Number of Menu Tabs** --- Specifies the number of menu tabs across the top of the Site Home Page. See [Section A.7.0.46, "IBE: Number of Menu Tabs"](#).

- **IBE: Number of Menu Subtabs** --- Specifies the number of menu subtabs below the menu tabs on the Site Home Page. See [Section A.7.0.45, "IBE: Number of Menu Subtabs"](#).

8.4.1.2 Setting the Number of Child Sections Per Page

The profile option, IBE: Sections Per Page for Display, allows you to set the maximum number of subsections to display on a page before the subsections fall to a new page. See [Section A.7.0.51, "IBE: Sections Per Page for Display"](#).

8.4.1.3 Displaying the Section Path

The profile option, IBE: Use Section Path, determines whether the section path displays in those catalog templates which can display a section path. See [Section A.7.0.71, "IBE: Use Section Path"](#).

8.4.1.4 Displaying Bins with Seeded Content

Three bins with seeded JSP content are controlled by profile options when using Fixed Layout for sections. These bins are:

1. Browse Bin --- See [Section 6.4.1.1, "Browse Bin"](#), for details.
2. Global Bin --- See [Section 6.4.1.2, "Global Bin"](#), for details.
3. Welcome Bin --- See [Section 6.4.1.3, "Welcome Bin"](#), for details.

8.4.1.5 Displaying a Set Number of Items in Leaf Sections

The profile option, IBE: Items Per Page for Display, specifies number of items to display in Leaf sections of the hierarchy (the ending sections of a node). See [Section A.7.0.37, "IBE: Items Per Page for Display"](#).

8.4.1.6 Displaying a Set Number of Items in Sections

The profile option, IBE: Items Per Section for Display, specifies the number of items to display in sections of the hierarchy that contain products. See [Section A.7.0.38, "IBE: Items Per Section for Display"](#).

8.4.1.7 Displaying a Set Number of Items in Multiple-Section Template

The profile option, IBE: Lines Per Section for Multiple Section Display, specifies the number of items to display per section in Display Templates that show multiple sections. See [Section A.7.0.39, "IBE: Lines Per Section for Multiple Section Display"](#).

8.5 Section Templates Overview

The structure of your catalog sections as they display on Customer UI pages is determined by your layout and template choices for the sections. To aid your understanding of the options involved, following is a process flow for building section structure.

8.5.0.8 Process Flow for Building Section Structure

In this process, you associate each section to:

- **A Layout Template** --- This choice determines whether all sections have the same bin locations (Fixed Layout) or whether each section can have separate bin locations (Configurable Layout).
and ---
- **A Display Template** --- This choice determines which section elements (name, description, content components) display for each section and how the section looks.

Note that it is optional to configure section structure. You can always accept the default layout and default templates.

1. **Select Layout Template** --- First, determine which Layout Template to use for each section. This is done in the Update Section: Layout page. The options for layout template are:
 - a. **Fixed Layout** --- When you use Fixed Layout for a section, the section's Display Template hard-codes bin locations. All sections using the same Display Template will display any mapped bins in the same location. For more information, see:
[--Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#)
[--Section 8.10.4, "Using Fixed Bin Layout"](#)
 - b. **Configurable Layout** --- When you use Configurable Layout, bins are configurable by section, meaning that each section can have a mapped bin or bins in a different location. For more information, see:
[--Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#)
[--Section 8.10.5, "Using Configurable Bin Layout"](#)

See [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), for steps detailing how to select Configurable or Fixed Layout and assign Display Templates to sections.

- c. **Custom Layout** --- Create custom Layout Templates which will display in the Layout type LOV after creation.
2. **Select Display Template** --- Next, select a Display Template for the section(s). This is done in the Update Section: Template page.

Display Template options are:

- a. **Default Template** --- Use the default Display Template for section(s). A default template exists for each section category. You can find the default templates in [Section 8.6, "Section Templates"](#).
- b. **Template Gallery** --- Use a template from the template gallery. You can find a list of the templates in [Section 8.6, "Section Templates"](#).

For complete steps, see [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#).

- c. **Custom Templates** --- Create and use customized Display Templates.
3. **Map Bins to Content** --- You can implement bins on the section pages to present content along the top, bottom, right, and left of your catalog pages. If using Configurable Layout, each section can have unique bin locations. If using Fixed Layout, all mapped bins display in the same location on all section pages using the same Display Template. See [Section 8.10, "Configuring Bin Placement and Content"](#), for steps detailing how to map bins to content, after you have selected either Fixed or Configurable Layout in the Update Section: Layout page.

8.6 Section Templates

Within the Oracle iStore Display Templates are those that display only sections and their related information. Display Templates allow Customer UI users to see such information as section name and description, links to subsections, and content (images or HTML files).

Topics in this section include:

- [Section 8.6.1, "Overview of Section Template Categories"](#)
- [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#)

- [Section 8.6.3, "Templates for Section Contains Featured Subsections Category"](#)
- [Section 8.6.4, "Templates for Section Contains Navigational Subsections Only Category"](#)
- [Section 8.6.5, "Templates for Section Contains Products Only Category"](#)
- [Section 8.6.6, "Templates for Component for Sections Contain Nav. Subsec. Only Category"](#)
- [Section 8.6.7, "Templates for Component for Sections Containing Products Only Category"](#)

8.6.1 Overview of Section Template Categories

Templates are categorized by the type of section they display. The section category is known as the *Applicable To* category of the template. The categories are:

1. Section Contains Featured Subsections
2. Section Contains Navigational Subsections Only
3. Section Contains Products Only
4. Component for Sections Containing Featured Subsections
5. Component for Sections Contain Navigational Subsections Only
6. Component for Sections Containing Products Only

See [Section 8.6.1.1, "Applicable To Categories for Display Templates Associated with Fixed Layout"](#), and [Section 8.6.1.2, "Applicable To Categories for Display Templates Associated with Configurable Layout"](#), below, for more information.

8.6.1.1 Applicable To Categories for Display Templates Associated with Fixed Layout

Three *Applicable To* categories exist within the Display Templates associated with Fixed Layout. These are:

1. **Section Contains Featured Subsections** --- For a list of templates in this category, see [Section 8.6.3, "Templates for Section Contains Featured Subsections Category"](#).
2. **Section Contains Navigational Subsections Only** --- For a list of templates in this category, see [Section 8.6.4, "Templates for Section Contains Navigational Subsections Only Category"](#).

3. **Section Contains Products Only** --- For a list of templates in this category, see [Section 8.6.5, "Templates for Section Contains Products Only Category"](#).

Note: For backward compatibility purposes, a fourth category exists: *Uncategorized section display templates*. This category is for templates which have been migrated during an upgrade.

8.6.1.2 Applicable To Categories for Display Templates Associated with Configurable Layout

Three *Applicable To* categories exist for Display Templates associated with Configurable Layout. These are:

1. **Component for Sections Containing Featured Subsections** --- All of the templates in this category have the same look and feel as those in [Section 8.6.3, "Templates for Section Contains Featured Subsections Category"](#) -- thus, this category does not have its own section describing each template; use [Section 8.6.3, "Templates for Section Contains Featured Subsections Category"](#), instead.
2. **Component for Sections Containing Navigational Subsections Only** --- All but one of the templates in this category have the same look and feel as those in [Section 8.6.4, "Templates for Section Contains Navigational Subsections Only Category"](#) -- thus, use this section for descriptions. In addition, this category has one more template, [Section 8.6.6.1, "Multilevel Subsection List with Content"](#); see [Section 8.6.6, "Templates for Component for Sections Contain Nav. Subsec. Only Category"](#), for details about this template.
3. **Component for Sections Containing Products Only** --- All but one of the templates in this category have the same look and feel as those in [Section 8.6.5, "Templates for Section Contains Products Only Category"](#) -- thus, use this section for template descriptions. In addition, this category has one more template, [Section 8.6.7.1, "Section Detail"](#). See [Section 8.6.7, "Templates for Component for Sections Containing Products Only Category"](#), for details about this template.

8.6.2 Fixed Versus Configurable Layout with Section Display Templates

For each section, you can select Fixed or a Configurable layout for Display Templates. See [Section 8.5.0.8, "Process Flow for Building Section Structure"](#), to gain an understanding of the typical flow for building section structure.

The primary difference between the two layouts are:

Fixed Layout:

- With fixed layout, the Display Templates hard-code all bins mapped to all locations. Thus, all sections using the same Display Template will have the same bin in each location (for bins mapped to content). See [Section 8.10.4, "Using Fixed Bin Layout"](#), for information about which bins can be used with Fixed Layout.

Configurable Layout:

- Bins associated to your sections are configurable by section. The Display Template used for each section renders the center part of the page, allowing you to map different bins to the same location for different sections. Thus, all sections using the same Display Template have identical rendering only in the center portion of the catalog page, but still are able to have different bins in the same location surrounding different sections. See [Section 8.10.5, "Using Configurable Bin Layout"](#), for details.
- The template gallery has two additional Display Templates which can understand content components -- these are [Section 8.6.6.1, "Multilevel Subsection List with Content"](#) and [Section 8.6.7.1, "Section Detail"](#).

Note that section templates in the fixed layout gallery have the same look and feel as those in the configurable layout gallery -- the same template look and feel that is available in the fixed layout gallery is similarly available in the configurable layout gallery. Templates within fixed and configurable layout are different templates, but each template for fixed layout has a corresponding configurable layout template with same appearance.

Important: In the Site Administration UI, you must first select the layout type (fixed or configurable) and then select a template for the section.

8.6.3 Templates for Section Contains Featured Subsections Category

With this category, the section itself also can have other Navigational subsections. For this type of template, the main (parent) section itself is never rendered, because when the user selects the parent section, the page flow automatically routes the user to the Featured subsection.

The following section templates are in this category:

- **Product Detail** --- See [Section 8.6.3.1, "Product Detail"](#), for information about this template.
- **Product Multi-Select** --- See [Section 8.6.3.2, "Product Multi-Select"](#), for information about this template.

- **Product Multi-Select with Section Links** --- [Section 8.6.3.3, "Product Multi-Select with Section Links"](#), for information about this template.

8.6.3.1 Product Detail

This template shows:

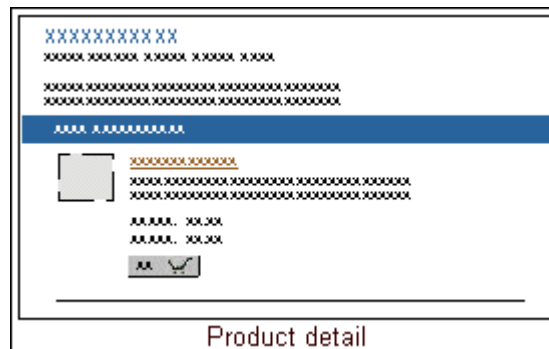
- Parent section short description
- Parent section long description
- Parent section additional information content component
- Product names
- Product small image content component
- Product descriptions

Programmatic access name --- STORE_CTLG_FSUBSCT

Default mapped JSP --- ibeCCtpFSubSct.jsp

The following graphic, [Figure 8–1, "Product Detail Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–1 Product Detail Section Display Template



Note: This also is the default template for this category (Section Contains Featured Subsections).

8.6.3.2 Product Multi-Select

This template shows:

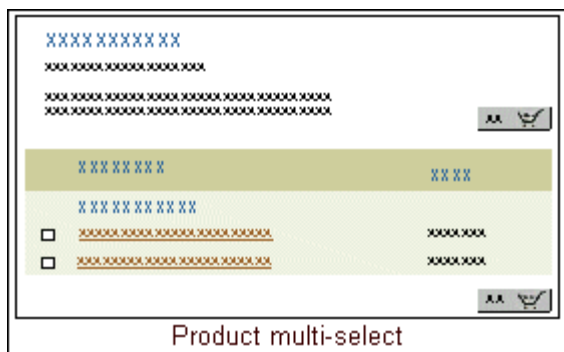
- Parent section short description
- Parent section long description
- Parent section additional information content component
- Product multi-selection option

Programmatic access name --- STORE_CTLG_FSUBSCT_MULT_2COL

Default mapped JSP --- ibeCCtpFSuStMs2.jsp

The following graphic, [Figure 8–2, "Product Multi-Select Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–2 Product Multi-Select Section Display Template



Note: If you use this section Display Template, you must change the seeded text message that displays. See [Section 8.13, "Setting up Section Display Templates Text Messages"](#).

8.6.3.3 Product Multi-Select with Section Links

This template shows:

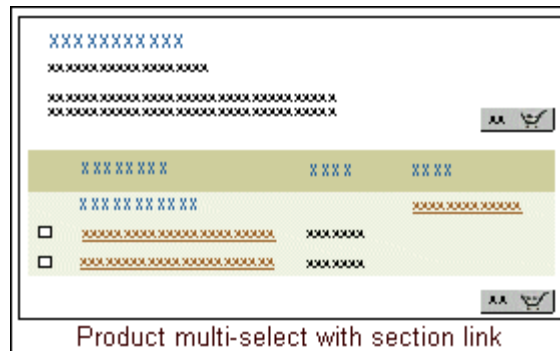
- Section short description
- Section long description
- Section additional information content component
- Product multi-selection option
- Section link

Programmatic access name --- STORE_CTLG_FSUBSCT_MULT_3COL

Default mapped JSP --- ibeCCtdFSuStMs3.jsp

The following graphic, [Figure 8–3, "Product Multi-Select with Section Links Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–3 Product Multi-Select with Section Links Section Display Template



Note: If you use this section Display Template, you must change the seeded text message that displays. See [Section 8.13, "Setting up Section Display Templates Text Messages"](#).

8.6.4 Templates for Section Contains Navigational Subsections Only Category

The following section templates are applicable to those sections which contain Navigational subsections only:

- [Section 8.6.4.1, "Subsection List"](#)
- [Section 8.6.4.2, "Subsection List 2"](#)
- [Section 8.6.4.3, "Multilevel Subsection List"](#)
- [Section 8.6.4.4, "Subsection List with Product Detail"](#)
- [Section 8.6.4.5, "Subsection List with Product Pull-Down List"](#)

8.6.4.1 Subsection List

This template shows:

- Parent section short description
- Parent section long description

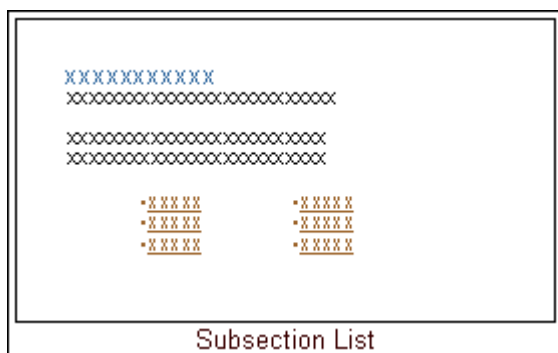
- Parent section additional information content component
- List of subsections as drill-down hyperlinks

Programmatic access name --- STORE_CTLG_SCT_BULLET_SUBSCT

Default mapped JSP --- ibeCCtpStBlSuSt.jsp

The following graphic, [Figure 8–4, "Subsection List Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–4 Subsection List Section Display Template



Note: This is also the default section template for this category (Section Contains Navigational Subsections Only).

8.6.4.2 Subsection List 2

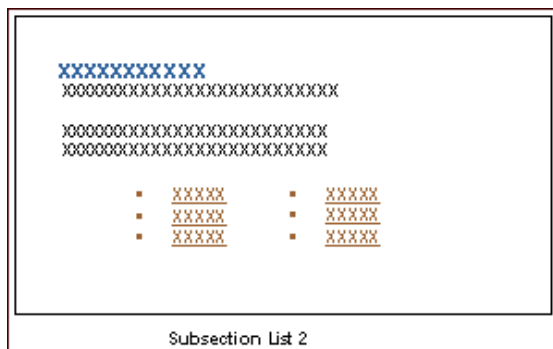
This template shows:

- Parent section name
- Parent section short description
- Section additional information content component
- List of subsections

Programmatic access name --- STORE_CTLG_SCTN_BULLET_SUBSCT

Default mapped JSP --- ibeCCtpStNBISuSt.jsp

The following graphic, [Figure 8–5, "Subsection List 2 Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–5 Subsection List 2 Section Display Template

8.6.4.3 Multilevel Subsection List

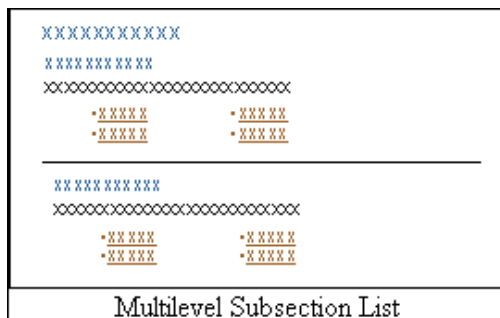
This template shows:

- Parent section short description
- Subsections names
- Subsections short description
- Children sections of subsections with drill-down links

Programmatic access name --- STORE_CTLG_DLDN_SCT_BULLET

Default mapped JSP --- ibeCCtpDdLfStBl.jsp

The following graphic, [Figure 8–6, "Multi-Level Subsection List Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–6 Multi-Level Subsection List Section Display Template

8.6.4.4 Subsection List with Product Detail

This template shows:

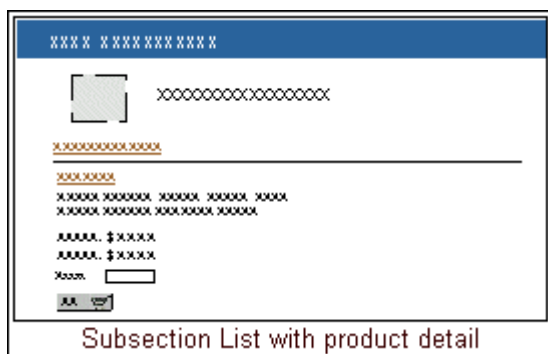
- Parent section name
- Parent section short description
- Parent section small image content component
- Subsections and their product details

Programmatic access name --- STORE_CTLG_DRILL_LEAF

Default mapped JSP --- ibeCCtpDrillLeaf.jsp

The following graphic, [Figure 8–7, "Subsection List with Product Detail Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–7 Subsection List with Product Detail Section Display Template



8.6.4.5 Subsection List with Product Pull-Down List

This template shows:

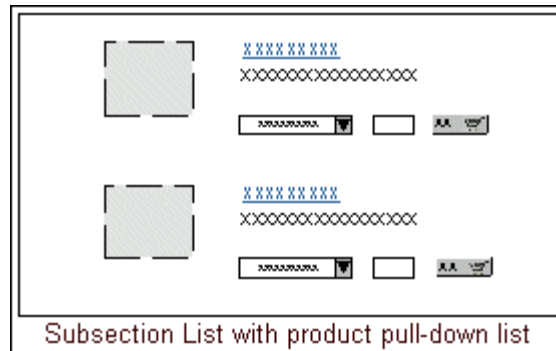
- Subsection names
- Subsection short descriptions
- Subsection images mapped to section small image content component
- Product pull-down list

Programmatic access name --- STORE_CTLG_SUBSCT_DPDN_ITEMS

Default mapped JSP --- ibeCCtpChStDdIts.jsp

The following graphic, [Figure 8–8, "Subsection List with Product Pull-Down Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–8 Subsection List with Product Pull-Down Section Display Template



8.6.5 Templates for Section Contains Products Only Category

The following section templates are applicable to those sections which contain only products:

- [Section 8.6.5.1, "Product Detail"](#)
- [Section 8.6.5.2, "Product Pull-Down"](#)
- [Section 8.6.5.3, "Product Detail Multi-Select"](#)
- [Section 8.6.5.4, "Product Multi-Select"](#)
- [Section 8.6.5.5, "Product Multi-Select with Drill-Down"](#)

8.6.5.1 Product Detail

This template shows:

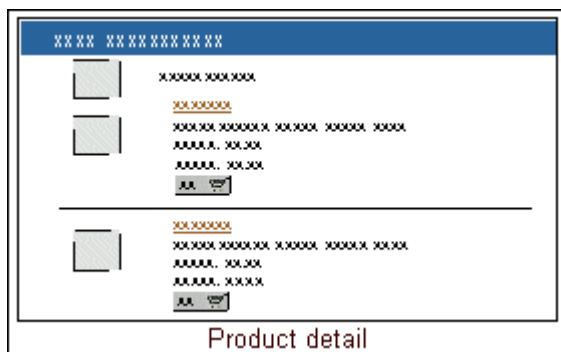
- Section name
- Section short description
- Section small image content component
- Product names
- Product small image content component
- Product descriptions

Programmatic access name --- STORE_CTLG_LEAF_SCT_SINGLE

Default mapped JSP --- ibeCCtpLeafSctSs.jsp

The following graphic, [Figure 8–9, "Product Detail Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–9 Product Detail Section Display Template



Note: This is also the default section template for this category (Section Contains Products Only).

8.6.5.2 Product Pull-Down

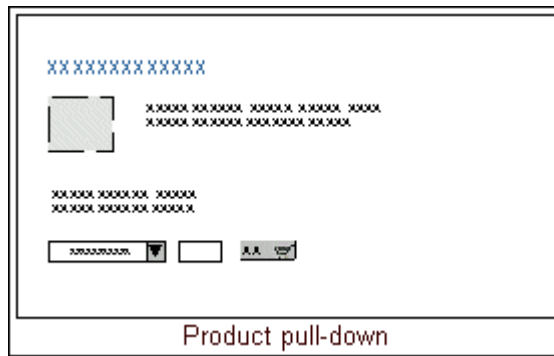
This template shows:

- Section name
- Section long description
- Section small image content component
- Section additional information content component
- Product pull-down list

Programmatic access name --- STORE_CTLG_SCT_DTL_DPDN_ITEMS

Default mapped JSP --- ibeCCtpStMmDtIts.jsp

The following graphic, [Figure 8–10, "Product Pull-Down Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–10 Product Pull-Down Section Display Template

8.6.5.3 Product Detail Multi-Select

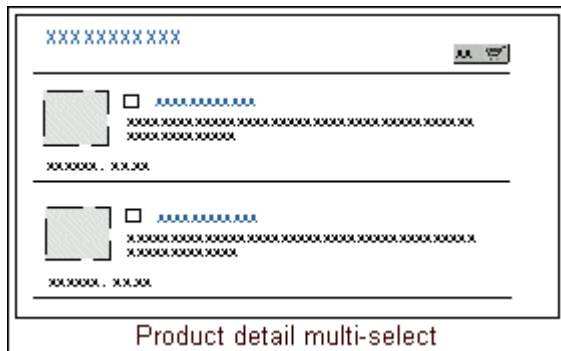
This template shows:

- Section short description
- Products multi-select option
- Product names
- Product small image content component
- Product descriptions

Programmatic access name --- STORE_CTLG_LEAF_SCT_ITEMS

Default mapped JSP --- ibeCCtpLfStlts.jsp

The following graphic, [Figure 8–11, "Product Detail Multi-Select Section Display Template"](#), shows how the template appears in the gallery.



This template shows:

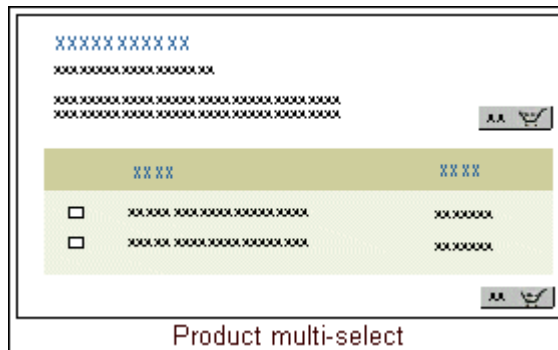
■ Section short desc

- Section short description
- Section long description
- Section additional information content component
- Products multi-select option

Default mapped ISP --- ibeCCtoLfStMs isp

The following graphic, [Figure 8-12](#), "Produ

The following graphic, [Figure 8–12, "Product Multi-Select Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–12 Product Multi-Select Section Display Template

8.6.5.5 Product Multi-Select with Drill-Down

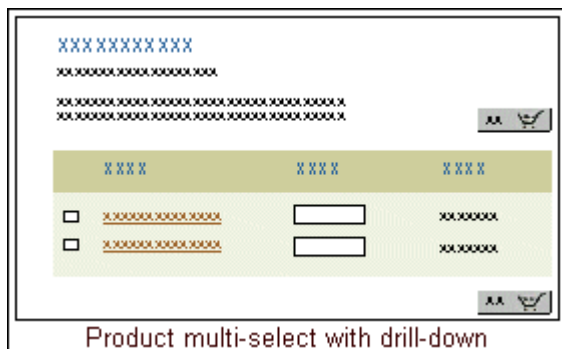
This template shows:

- Section short description
- Section long description
- Section additional information content component
- Products multi-select option
- Links to product detail pages

Programmatic access name --- STORE_CTLG_LEAF_SCT_MULTIPLE

Default mapped JSP --- ibeCCtpLfStMsL.jsp

The following graphic, [Figure 8–13, "Product Multi-Select with Drill-Down Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–13 Product Multi-Select with Drill-Down Section Display Template

8.6.6 Templates for Component for Sections Contain Nav. Subsec. Only Category

Within the configurable layout option, the following section templates are applicable to those sections which contain Navigational subsections:

- **Multilevel Subsection List with Content** --- This template is available for configurable layout only; see [Section 8.6.6.1, "Multilevel Subsection List with Content"](#).
- **Subsection List** --- This template also is available for fixed layout; see [Section 8.6.4.1, "Subsection List"](#).
- **Subsection List 2** --- This template also is available for fixed layout; see [Section 8.6.4.2, "Subsection List 2"](#).
- **Multilevel Subsection List** --- This template also is available for fixed layout; see [Section 8.6.4.3, "Multilevel Subsection List"](#).
- **Subsection List with Product Pull-Down List** --- This template also is available for fixed layout; see [Section 8.6.4.5, "Subsection List with Product Pull-Down List"](#).
- **Subsection List with Product Detail** --- This template also is available for fixed layout; see [Section 8.6.4.4, "Subsection List with Product Detail"](#).

8.6.6.1 Multilevel Subsection List with Content

This template is specifically designed to show subsections within a section, along with content mapped to content components at the section level. This template shows:

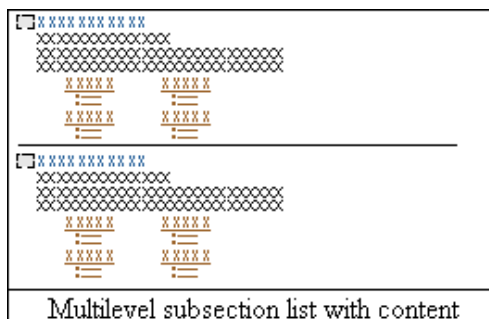
- Subsection name
- Subsection image -- This is the image mapped to section small image content component at the section level.
- Subsection short description
- Subsection additional information -- This is HTML content mapped at the section level to the Section Additional Information content component.
- Sub-subsection names -- All child sections within the subsection will display in column format; sub-subsection names are drill-down hyperlinks.
- Content items mapped to sub-subsections -- A list of content items (as defined by any of the content components Section Additional Information 1 through 5 mapped to the child section) display under the sub-subsection name; content item names are drill-down hyperlinks.
- Detail areas showing sub-subsection names and additional information mapped to the sub-subsection

Programmatic access name --- STORE_SECT_MULTILEVEL_SUBSECT_INCL

Default mapped JSP --- ibeCCTdStMlSubStl.jsp

The following graphic, [Figure 8–14, "Multilevel Subsection List with Content Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–14 Multilevel Subsection List with Content Section Display Template



8.6.7 Templates for Component for Sections Containing Products Only Category

Within the configurable layout option, the following section templates are applicable to those sections which contain only products:

- **Product Detail** --- This template also is available for fixed layout; see [Section 8.6.5.1, "Product Detail"](#).
- **Product Pull-Down** --- This template also is available for fixed layout; see [Section 8.6.5.2, "Product Pull-Down"](#).
- **Product Detail Multi-Select** --- This template also is available for fixed layout; see [Section 8.6.5.3, "Product Detail Multi-Select"](#).
- **Product Multi-Select** --- This template also is available for fixed layout; see [Section 8.6.5.4, "Product Multi-Select"](#).
- **Product Multi-Select with Drill-Down** --- This template also is available for fixed layout; see [Section 8.6.5.5, "Product Multi-Select with Drill-Down"](#).
- **Section Detail** --- This template is only available for configurable layout; see [Section 8.6.7.1, "Section Detail"](#).

8.6.7.1 Section Detail

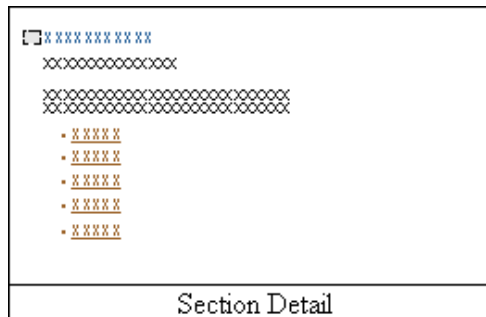
This template is specifically designed to show section details, along with content mapped to content components at the section level. This template shows:

- Section name
- Section image -- This is the image mapped to section small image content component at the section level.
- Section short description
- Subsection additional information -- This is HTML content mapped at the section level to the section additional information content component.
- Content items mapped to sub-subsections -- A list of content items (as defined by any of the content components section additional information 1 through 5 mapped to the child section) display under the subsection name; content item names are drill-down hyperlinks.
- Detail areas showing sub-subsection names and additional information mapped to the sub-subsection

Programmatic access name --- STORE_SECT_DETAIL_INCL

Default mapped JSP --- ibeCCtdStDetL.jsp

The following graphic, [Figure 8–15, "Section Detail Section Display Template"](#), shows how the template appears in the gallery.

Figure 8–15 Section Detail Section Display Template

8.7 Product Display Templates

Within the Oracle iStore Display Templates are those that display products. Of course, since products only appear within the context of a section, the overall structure around the product display is affected by the section display templates.

This section lists the seeded templates for products:

- [Section 8.7.0.2, "Product Additional Information"](#)
- [Section 8.7.0.3, "Product Basic Information"](#)
- [Section 8.7.0.4, "Product Basic Information with Image"](#)
- [Section 8.7.0.5, "Product Detail with Image"](#)
- [Section 8.7.0.6, "Product Detail without Image"](#)
- [Section 8.7.0.7, "Product Detail with Services"](#)

For steps on how to assign templates, see [Section 8.9.7, "Setting Display Templates for Products"](#).

8.7.0.2 Product Additional Information

Use this template to display Featured products in a Featured section.

Programmatic access name --- STORE_CTLG_ITEM_INFO

Default mapped JSP --- ibeCCtdItemInfo.jsp

Note: This is a migrated Display Template which appears in the Custom Display Template LOV in the Template Gallery of the Products > Display Template page. No image of this template displays in the Template Gallery.

8.7.0.3 Product Basic Information

This template shows:

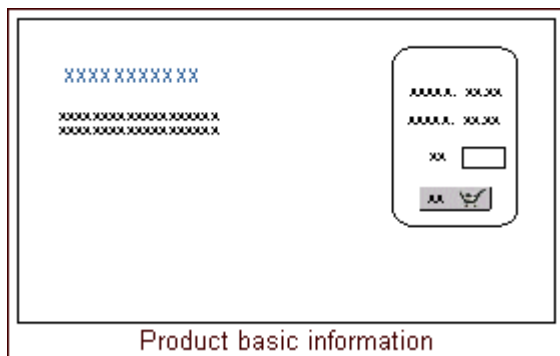
- Product name
- Product description
- Add to Cart bin

Programmatic access name --- STORE_CTLG_ITEM_DESC

Default mapped JSP --- ibeCCtdItemDesc.jsp

The following graphic, [Figure 8–16, "Product Basic Information Display Template"](#), shows how the template appears in the gallery.

Figure 8–16 Product Basic Information Display Template



8.7.0.4 Product Basic Information with Image

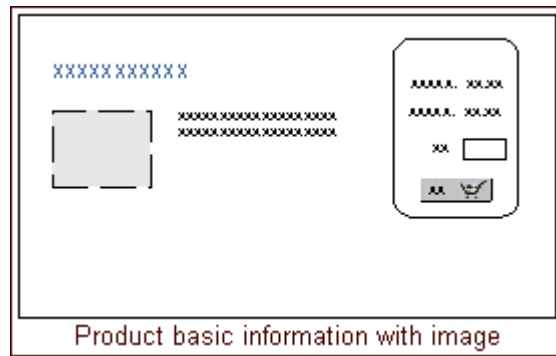
This template shows:

- Product name
- Product description
- Product large image content component
- Add to Cart bin

Programmatic access name --- STORE_CTLG_ITEM_DESC_AND_IMG

Default mapped JSP --- ibeCCtdItemDescImg.jsp

The following graphic, [Figure 8–17, "Product Basic Information with Image Display Template"](#), shows how the template appears in the gallery.

Figure 8–17 Product Basic Information with Image Display Template

8.7.0.5 Product Detail with Image

This template shows:

- Product name
- Product description
- Product large image content component
- Product additional information content component
- Add to Cart bin
- Product descriptive flexfields
- Related products

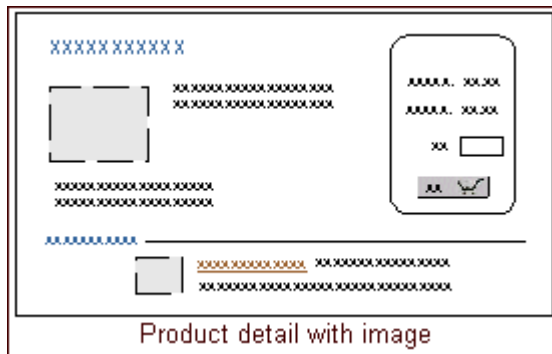
Programmatic access name --- STORE_CTLG_ITEM_DETAILS

Default mapped JSP --- ibeCCtdItemDetail.jsp

Note: This also is the default Display Template for products.

The following graphic, [Figure 8–18, "Product Detail with Image Display Template"](#), shows how the template appears in the gallery.

Figure 8–18 Product Detail with Image Display Template



8.7.0.6 Product Detail without Image

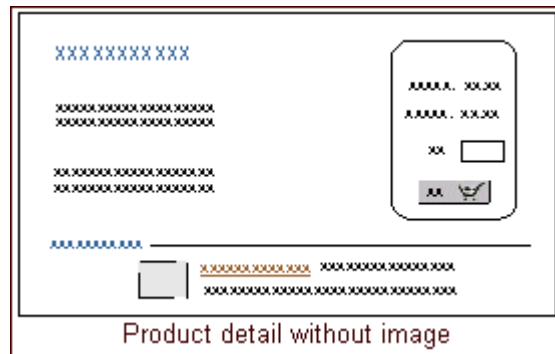
This template shows:

- Product name
- Product description
- Product additional information content component
- Add to Cart bin
- Product descriptive flexfields
- Related products

Programmatic access name --- STORE_CTLG_ITEM_DETAILS_NO_IMG

Default mapped JSP --- ibeCCtdItemDtlNoImg.jsp

The following graphic, [Figure 8–19, "Product Detail without Image Display Template"](#), shows how the template appears in the gallery.

Figure 8–19 Product Detail without Image Display Template

8.7.0.7 Product Detail with Services

This template is specifically designed to display service items. This template shows:

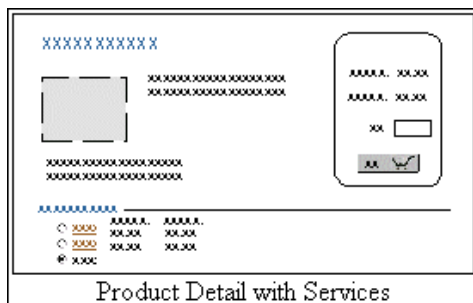
- Product name
- Product description
- Product large image content component
- Product additional information content component
- Add to Cart bin
- Descriptive flexfields
- A "Services" area listing:
 - Services associated to the serviceable product as mutually exclusive radio buttons (default selection is "None")
 - Prices for each of the services, including "List/Retail Price" and "Your Price" support

Programmatic access name --- STORE_CTLG_SVA_SVC_LIST

Default mapped JSP --- ibeCCndSvaSvcList.jsp

The following graphic, [Figure 8–20, "Product Detail with Services"](#), shows how the template appears in the gallery.

Figure 8–20 Product Detail with Services



8.8 Creating and Maintaining Sections

This section contains information on section creation and maintenance. Topics include:

- [Section 8.8.1, "Creating Sections"](#)
- [Section 8.8.2, "Duplicating Sections"](#)
- [Section 8.8.4, "Assigning Sections to Sites"](#)
- [Section 8.8.3, "Adding Products to Sections Using the Sections Pages"](#)
- [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#)
- [Section 8.8.5, "Adding Content to Sections"](#)
- [Section 8.8.7, "Setting the Display Order of Section Descendants"](#)
- [Section 8.8.8, "Using the Section Search Utility"](#)

See [Section 8.10, "Configuring Bin Placement and Content"](#), for information on how you can implement bins to surround your section display templates with additional JSPs and content.

Note: All of the steps in this section assume you will log in to the Oracle iStore Site Administration UI as the iStore administrator.

For product maintenance tasks in the context of sections, see [Section 8.9, "Maintaining Products in Sections"](#).

Note on Categories page within the Section pages: The Categories page within the Sections menu is used for Oracle iStore's Product Autoplacement functionality only. See [Section 7.7, "Using Product Autoplacement"](#), for more information.

8.8.1 Creating Sections

Using the Sections pages within the Site Administration UI Catalog tab, you can create as many sections as you wish.

Note: In the Sections summary page, Catalog Hierarchy, you can use the Focus icon located next to section names to focus in on and work with a particular section or a section and its children.

See [Section 8.8.8, "Using the Section Search Utility"](#), for instructions on using section search.

Use the following procedure to create a section.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in your section hierarchy.
2. To create a new section or subsection, identify a Navigational section (containing no products). In the row of the identified Navigational section, select the Create Sections icon (this will be the parent section for the section you are creating). If you select a section containing products, you will get an error message, *Create Section: 'section name' already contains Products. You cannot add subsections under this section. Sections can only contain subsections or products. Please use featured subsections to have sections and products at the same level.*

The following graphic, [Figure 8–21, "Create Section Icon"](#), shows the Create Sections icon in the Sections summary page.

Figure 8–21 Create Section Icon



The Create Section page opens.

3. In the Create Section page, enter/set the following information:
 - **Section Name** --- Enter the name of the section. This name will appear in the Customer UI.
 - **Section Code** --- Use this field to enter/update section code. Currently, section code is used only for your internal business purposes. Some of the section search screens allow you to search on this field. In addition, this code may be useful if you intend to customize iStore templates. For

example, you could specify a section code to use as a name for the section in a customized JSP. The code in this custom template could then refer to the section and access its information directly by using its section code.

- **Short Description** --- Enter a short description for the section. This text will display in the Customer UI underneath the section name, if being used by a template which can display this information.
- **Long Description** --- Enter a long description for the section. This text will display in the Customer UI underneath the section short description, if being used by a template which can display this information.
- **Keywords** --- Enter any keywords for the section in the Keywords textbox. After you enter them in the system, you can search by keywords using the search utility. Separate multiple keywords with commas.
- **Parent Section** --- When creating sections, this field will default to the parent section chosen in the Catalog Hierarchy page. To assign a new parent section, use the flashlight icon to launch the Search and Select: Catalog Sections page. The Search and Select: Catalog Sections page sorts sections alphabetically by name. Sections of both Published and Unpublished statuses will display. Featured sections and Navigational sections with products will not display, as these types of sections cannot have subsections. To select a section in the list, activate its radio button and then press the Select button.
- **Featured Section** --- Select this checkbox to make this section a Featured section. See [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#), for more information.
- **Status** --- Select either Published or Unpublished. See [Section 8.3.4, "Section Statuses: Published or Unpublished"](#), for more information.
- **Apply status to all descendant sections** --- Select this checkbox to have all descendent sections of this section use the same Published/Unpublished status. De-select to allow each descendant section to have its own status values defined.
- **Start Date** --- Select the calendar icon to enter/update the effective Start Date for the section. The section will be available in the Customer UI on the date you select here (providing the site containing the section also is valid.)
- **End Date** --- Select the calendar icon to enter/update the effective End Date for the section. The section will be unavailable in the Customer UI on the date you select here.

4. Press Apply to save changes. The display will change to Update Sections: Detail page. From this page, you can create new sections or add products to this section, without having to navigate back the Hierarchy page.

8.8.1.1 Deleting Sections

You can delete a section at any time by selecting the section in the Catalog Hierarchy page and then pressing the Delete button. When you delete a section, all children (subsections or products) are removed.

Note: You cannot delete a section from the section hierarchy if that section or its child sections are being used as a root section for a site.

8.8.2 Duplicating Sections

The Catalog Hierarchy with the Sections menu features the ability to duplicate any existing section or subsection. When you duplicate a section, all data associated with the original section --- including parameters, children (subsections or products), templates, site assignments, and content --- are copied to the new section.

Note: If the original section from which the copy was made is deleted, Oracle iStore can still access the products, contents and the templates data. In addition if you try to duplicate a section that has more than 1,000 subsections as children, Oracle iStore does not complete the process and displays an error message.

Use the following procedure to duplicate a section.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in your site hierarchy.
2. Select the radio button of the section to be duplicated, and select the Duplicate button. The Duplicate Section page displays.
3. In the Duplicate Section page, enter a new, unique name for the section in the New Section Name field. While functionally the name for the new section need not be unique, as a best practice, it is recommended that you do not use identical names for your sections.
4. Optionally, select a new Parent Section for the duplicated section. Note that in the Search and Select: Catalog Sections page, sections of both Published and Unpublished statuses will display. Featured sections and Navigational sections with products will not display, as these types of sections cannot have

subsections.. If you do not select a new parent, the original section's parent section will be the parent section.

5. Select Apply to save changes. The duplicated section and all of its children (if applicable) now should appear in the Catalog Hierarchy page.

8.8.3 Adding Products to Sections Using the Sections Pages

Within the Site Administration UI Catalog tab, you can add products to a section either through the Sections pages or through the Products pages.

This section contains steps to add products to sections in the Sections pages. For instructions on how to assign sections to a single product using the Products pages, see [Section 8.9.4, "Adding Products to Sections Using the Products Pages"](#).

You also can use Oracle iStore's Product Autoplacement feature to automatically add products to leaf sections; see [Section 7.7, "Using Product Autoplacement"](#), for details.

You can use this procedure to add one or several products at once to a single section.

Prerequisites

- Products have been implemented. See [Chapter 7, "Implementing Products"](#), for details.
- The section to which products are being added has no subsections.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. You can add products through the Catalog Hierarchy page or through the Update Section page:
 - a. From the Catalog Hierarchy page, in the Products column, select the Add Products icon next to the section to which you are adding products. Note that the Add Products icon displays for all sections. However, products can only be added to sections which do not contain child sections. If you attempt to add products to ineligible sections, the following error message displays: *Add Products: 'section name' already contains subsection(s). You cannot add products under this section. Sections can only contain subsections or products. Please use featured subsections to have sections and products at the same level.*

The following graphic, [Figure 8–22, "Add Products Icon"](#), shows the Add Products icon in the Sections Hierarchy page.

Figure 8–22 Add Products Icon



After you select the Add Products icon, the Add/Update Product Assignments page appears, with information for the section that is being updated displaying at the top of the page, and the Products table showing all currently assigned products for this section in the lower portion of the page.

- b. From the Update Section page, select Add Products to retrieve the Update Section: Add Products page.
3. Select the Add Products to Section button. The Search and Select: Products page appears, where you can search for and select the product(s) you wish to add to the section.

All products from your default product category set will display in the Search and Select: Products page. See [Section 7.3, "Guidelines and Considerations for Oracle iStore Product Setup"](#), for more information about the products LOVs in the Site Administration UI.

- **Product Number** relates to Item field in Oracle Inventory forms.
- **Product Name** relates to Description field in Oracle Inventory forms.

Select product(s) by activating the appropriate checkbox(es) in the Select column and pressing the Select button.

4. Once you have returned to the Update Product Assignments page, the products chosen in the previous step will display in the page, along with any other previously assigned products.
 - a. The Start Date field will be populated with the today's date. You can change this value if desired. This date is stored in IBE (iStore) schema, and indicates the start date for the association of section and product. It is not the product creation date in Oracle Inventory.
 - 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.
 5. Select Apply to save changes. The products are now assigned to the section.

8.8.4 Assigning Sections to Sites

Use the Update Section: Sites page within the Sections menu to assign a section to one or more sites. By default, when you create a section, it will be included in the sites that its parent section is included in. However, you can choose which sites the section should apply to.

Note: When you navigate to the Site > Update page to associate a catalog root section, all the site-section associations are rebuilt in the database, and the old associations are cleaned up.

Use the following procedure.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. Select the radio button of the applicable section. Select the Update button. The Update Section: Details page appears.
3. Select the Sites hyperlink. The Update Section: Sites page appears.
4. In the Site Exclusion area, the *Included Sites* and *Excluded Sites* shuttle windows display the sites in which this section is included/excluded.

Important: If the profile option, IBE: Use Catalog Exclusions, is set to No, the sections will still show up in excluded sites. Be sure to set the profile option to Yes for the exclusion functionality to work properly.

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

Note: If the selected site has a parent section, only the sites to which this parent section belongs are candidates for inclusion. To include the section in other sites not in the list (sites to which the parent doesn't belong), you must change the parent section's site assignments or change the parent section assignment for this section.

6. Optionally, select the *Include this section in all future sites whose root section is an ancestor of this section* checkbox. This will make this section automatically included in other sites that you create whose root section is an ancestor of this section.
7. Select Apply to save changes.

Remember that each site is linked to a single parent section. If you wish a specialty site's top level navigation to be driven from a specific section, you

must select that section as the Catalog Root Section in the Update Site: Details page. See [Section 5.2.1, "Create a Site: Getting Started and Entering Basic Information"](#), for more information.

8.8.5 Adding Content to Sections

You can use Oracle iStore's content components and media object functionality --- in combination with your own content source files --- to add content to sections. See [Section 9.1, "Content Overview"](#), to learn the basics of how Oracle iStore can display content in your speciality sites.

Use the following procedure to add content to a section.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. Select the radio button of the applicable section. Select the Update button. The Update Section: Details page appears.
3. Select the Content hyperlink. The Update Section: Content page appears.

The Update Section: Content page lists existing (seeded and non-seeded) content components that can be used for sections. Content components names appear in the Select Media area. See [Section 9.2.1, "Seeded Content Components"](#), for a list and descriptions of seeded content components.

Note: Remember, if you use a non-seeded content component, you must modify the Display Template to use the new content component. See [Section D.1, "Advanced Content Tasks"](#), for more information.

4. In the list, find the content component that you wish to use, and map a media object to it: Select the content component's flashlight icon launch the Search and Select: Media Object page.
5. In the Search and Select: Media Object page, search for and then select a media object. To select a media object, activate the radio button of the object and press the Select button.

For more information about media objects classes, see [Section 9.1.2, "Media Objects and Content Components Classes"](#). For a list of the seeded media objects, see [Section E.22, "Media Objects"](#).

6. Once you return to the Update Section: Content page, the media object which you selected in the previous step will be displayed in the textbox next to the content component.
7. Press Apply to save changes.

You also can create a new media object in this screen by selecting the Create Media Object icon and entering the new object information. See [Section 9.3.3, "Creating New Media Objects"](#), for more information.

You can show the site/language mappings for the content and add more content items by selecting the Show Details hyperlink. In Show mode, you can:

- Select View Mapping to view any site/language mappings for the content associated to the media object, in the Media Object Details page. If no site/language mappings exist, then this button is de-active. A content file must be mapped to the media object before site/language mappings can be established.
 - Select Add Content to add a content item to the media object in the Update Section: Add Content page. If no media object has been selected, then this button is de-active.
8. If you have not already done so, map a content source file to the media object you selected in the steps above. You can do this from this page by selecting the Add Content button. You also can map content from the Content > Media Objects pages.
 9. If desired, map different content items to specific site/language combinations.

See [Section 9.3.4, "Assigning Content Items to Media Objects"](#), for directions related to mapping content to media objects.

The following graphic, [Figure 8–23, "Update Section: Content Page with Media Object Mapped for Section"](#), shows an excerpted portion of the Update Section: Content page, with a media object chosen for the Section Additional Information seeded content component.

Figure 8–23 Update Section: Content Page with Media Object Mapped for Section


Select Media

Section Additional Information  

 [Hide details](#)

Content

[View Mapping](#) [Add Content](#)

Content	Version	Default	Update	Preview	Remove
additional_info_for_Carmen_store_section.htm					

8.8.6 Selecting Layout and Setting Display Templates for Sections

Using the Templates page within the Sections pages, you can set Display Templates to control the appearance of your site sections. Each section can have its own Display Template mapping. Within section templates functionality, you have the choice of using either Fixed or Configurable Layout -- first you choose the layout type, then select a template from the gallery available within each layout type. See [Section 8.5.0.8, "Process Flow for Building Section Structure"](#), and [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#), for more information.

Note: Though Oracle iStore does allow switching from configurable to fixed layout after components have been mapped, it not advisable to do so.

See [Section 8.10.5, "Using Configurable Bin Layout"](#), for information on using the configurable section bin layout feature.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. Select the radio button of the section for which you are making Display Template assignments. Select the Update button. The Update Section: Details page appears.
3. Select the Templates hyperlink. In the Update Section: Layout page, select either Configurable Layout or Fixed Layout. See [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#), to understand the benefits and differences of each type of layout.

Note: Two sub-pages are included within the Templates link: Layout and Display Template.

4. After you select the layout type, you then use the Display Template link to select a Display Template that fits the Applicable To category of the section you are updating.

When using Configurable Layout, you also can set bins to display for the section you're updating --- see [Section 8.10.5, "Using Configurable Bin Layout"](#), for details.

5. From the *Select a Display Template LOV*, select the appropriate Display Template category for the section you are updating. Section categories and the templates within them are described in [Section 8.6, "Section Templates"](#).
6. Press Go to apply your selection. The screen refreshes, with the templates available in the chosen category displaying in the Template Gallery.
 - To use the default template, select the Default Template option.
 - If not using the default template, select a template's radio button.
7. Press Apply to save changes.

Optionally, you may select a custom Display Template for the section. Any custom Display Templates that you have created will display in the Custom Display Template LOV. Previously migrated templates also will display in this LOV.

In the case of fixed layout, the custom display template can be one that customizes not only the central part of the layout but also the page layout.

Optionally, if you have enabled and set up Display Styles for your product categories, you may select one of these display styles from the Select a Display Style LOV in the Product Display Style area at the bottom of the page. For more information on Display Styles, see [Section D.5, "Using Display Styles for Default Display"](#).

8.8.7 Setting the Display Order of Section Descendants

Using the Update Section: Display Order pages within the Catalog tab, you can set the display order of a section's descendant sections -- whether subsections or products. This allows you to re-arrange the order of subsections or products in the Customer UI without customizing the Display Template. Advanced users can use an SQL statement to order the products in the UI as well.

The Display Order pages change depending on which type of children a section has:

- **Subsections only** --- If the section has subsections only, then the sections will display in the re-order window. Plus, the Advanced SQL ordering option is not available.
- **Products only** --- If the section has products only, then the products will display in the re-order window, and the Advanced SQL option is available.

Note: You cannot enable the reordering of both products and sections simultaneously.

8.8.7.1 Using the Re-Order Shuttle to Order Section Descendants

Use the following steps to re-order a section's descendants using the re-order shuttle.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. Select the radio button of the applicable section. Select the Update button. The Update Section: Details page appears.
3. Select the Display Order hyperlink. The Update Section: Display Order page appears.
4. Ensure that the radio button is enabled for the option: *Or use the reordering shuttle table below*. Note that this will be the only option available if the section's descendants are subsections and not products.
5. In the shuttle windows, select the section descendants with your mouse and use the up and down arrows to set the order of the section descendants.
6. Select Apply to save changes.

8.8.7.2 Using SQL to Order Section Descendants

Advanced users may wish to use the Update Section: Display Order - Order by Clause page in the Sections menu to order products in a Featured section.

This page allows you to manually enter an SQL order by clause which will be used at runtime by the Customer UI, allowing the products to be displayed within the section template that you specify.

The SQL script can only contain subsets of the column attributes of the MTL_SYSTEM_ITEMS_B and MTL_SYSTEM_ITEMS_TL tables.

The order by clause must contain a list of columns with the sorting order, ascending or descending, for each column. The syntax is as follows:

```
COLUMN1 [ ASC | DESC ], COLUMN2 [ ASC | DESC], ...
```

Other syntaxes are not supported and will generate an error message in the specialty site.

Example -- A Section's Order By Clause

The following order by clause sorts items by creation date in descending order and description in ascending order:

```
CREATION_DATE DESC, DESCRIPTION ASC
```

Steps

Use the following steps to re-order a section's descendants using an SQL clause.

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. Select the radio button of the applicable section. Select the Update button. The Update Section: Details page appears.
3. Select the Display Order hyperlink. The Update Section: Display Order page appears.
4. Ensure that radio button is enabled for the option: *Advanced SQL*. Note that this option will **not** be available if the section's descendants are subsections and not products.
5. Select the Go button. The Update Section: Display Order - Order by Clause page appears.
6. Enter the SQL clause in the Order By Clause window. Use the examples above to assist you.
7. Select Apply to save changes.

8.8.8 Using the Section Search Utility

Using the section search utility, you can perform Simple or Advanced searches of the section hierarchy. Use the following steps:

- [Section 8.8.8.1, "Steps for Simple Section Search"](#)
- [Section 8.8.8.2, "Steps for Advanced Section Search"](#)

8.8.8.1 Steps for Simple Section Search

Use the following steps to perform a Simple search of the section hierarchy:

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. You can search the section hierarchy by:
 - **Section Name**
 - **Section Code**
 - **Keywords** -- These are keywords you have entered and saved.
 - **Status** -- Enter Published or Unpublished.

In the search textbox, enter all or partial values. The search utility is case-insensitive. You may use % symbol as a wildcard if desired.

3. Press the Enter key or select the Go button to engage the search.
4. The search results are displayed in a table that allows you to access the Update Section: Details page for a particular section, by selecting the Section Name hyperlink in the table. You also can select the Hierarchy symbol in this table to re-navigate to the Catalog Hierarchy page.

8.8.8.2 Steps for Advanced Section Search

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

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy lists all sections and subsections in the site hierarchy.
2. Select the Advanced button. The Catalog Hierarchy, Advanced Search page displays.
3. In Advanced search, you can search the section hierarchy by:
 - **Section Creation Date** --- Use the calendar icon in the From Date and To Date fields to set date-related search criteria.
 - **Section Name**
 - **Section Code**
 - **Keywords** -- These are keywords you have entered and saved.

In the search textbox, enter all or partial values. The search utility is case-insensitive. You may use % symbol as a wildcard if desired.

4. Press the Go button to engage the advanced search.
5. The search results are displayed in a table that allows you to access the Update Section: Details page for a particular section, by selecting the Section Name hyperlink in the table. You also can select the Hierarchy symbol in this table to re-navigate to the Catalog Hierarchy page.

8.9 Maintaining Products in Sections

This section contains information on maintaining products within the section hierarchy. Topics include:

- [Section 8.9.1, "Products Summary Page"](#)
- [Section 8.9.2, "Previewing Products"](#)
- [Section 8.9.3, "Updating Product Details"](#)
- [Section 8.9.4, "Adding Products to Sections Using the Products Pages"](#)
- [Section 8.9.5, "Including or Excluding Products from Sites"](#)
- [Section 8.9.6, "Setting Content at the Product Level"](#)
- [Section 8.9.7, "Setting Display Templates for Products"](#)
- [Section 8.9.8, "Searching for Products"](#)
- [Section 8.9.9, "Guidelines and Behavior of Product Search"](#)

Note: All of the steps in this section assume you will log in to the Oracle iStore Site Administration UI as the iStore administrator.

Product relationship information is in [Section 8.12, "Using Product Relationships"](#).

Additional product implementation and maintenance information can be found in [Chapter 7, "Implementing Products"](#).

Optional integration with Oracle Marketing can provide enhanced product functionality. See [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

8.9.1 Products Summary Page

Products of Published and Unpublished status will display in the Products summary page, accessible by navigating as follows: Catalog > Products. Following are some points about this screen:

- This screen's default search will retrieve no products. Enter criteria into the search utility to retrieve products. See [Section 8.9.8, "Searching for Products"](#), for search instructions.
- Published products show a checkmark in the Published Products status column. Products must be Published in order to display in the Customer UI.
- For Unpublished products, the Published Products status column will be blank.
- Products with a status of Disabled will not be displayed.
- The Product Name, Product Number, and Creation Date columns are sortable in ascending/descending order by selecting the column heading.
- The Sections Assigned and Content Components columns are drill-down hyperlinks that let you see the details of section and content component assignments.

8.9.2 Previewing Products

Oracle iStore's Preview mode allows site administrators to preview products in the context of the specialty site(s) that include the products.

Typically, Preview mode is accomplished by pressing the Preview button on applicable screens in the Site Administration UI.

All products -- whether of Published or Unpublished status --- will display in Preview mode. You cannot perform any transactions while in Preview mode.

Note: In Preview mode, only specialty sites which support the administrator's current session language will display. Also, Preview mode is not supported when accessing the Customer UI through Oracle 9iAS Web Cache. See [Section 19.1.2, "Using Preview Mode"](#), for more information.

8.9.3 Updating Product Details

In the Site Administration UI, you can update a product's basic information and set the Web Status (Published/Unpublished) flag.

Use the following procedure.

Steps

1. Log into the Site Administration UI. Select Catalog > Products. The Products summary page displays. Search for products, using the steps in [Section 8.9.8, "Searching for Products"](#).

2. Select the radio button of the applicable product. Select the Update button.
3. In the Product Details page, you can modify the following:

- Product Name
- Description
- Web Status flag (Published/Unpublished)

See the following sections for more information:

- [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#)
 - [Section 8.3.5, "Product Statuses: Published or Unpublished"](#)
4. Select Apply to save the changes.

8.9.4 Adding Products to Sections Using the Products Pages

You can use this procedure to add a single product to multiple sections at the same time.

Steps

1. Log in to the Site Administration UI. Select Catalog > Products. The Products summary page displays. Search for products, using the steps in [Section 8.9.8, "Searching for Products"](#).
2. Select the radio button of the product you wish to update, and select the Update button. The Update Product: Details page appears.
3. Select the Sections hyperlink. The Update Product: Sections page appears, showing all section assignments for the selected product.
4. To add the product to a section(s), select the Add Product to Sections button. The Search and Select: Catalog Sections page appears, where you can search for and select appropriate sections.

Note that only those sections who are candidates for product assignment will display in the Search and Select: Catalog Sections page. See [Section 8.3, "Catalog Overview"](#), for more information.

Use the Select checkboxes to select one or more sections, and press the Select button to save changes.

5. The product is now added to the section(s). Remember that the product, its section, and the site in which it appears must be in Published status and within valid dates to appear in the Customer UI.

8.9.5 Including or Excluding Products from Sites

By default, products are included in all sites which their parent section belongs to. You can exclude or include a product in specific site(s), using the following procedure.

Important: If the profile option, IBE: Use Catalog Exclusions, is set to No, the products will still show up in excluded sites. Be sure to set the profile option to Yes for the exclusion functionality to work properly.

Steps

1. Log in to the Site Administration UI. Select Catalog > Products. The Products summary page displays. Search for products, using the steps in [Section 8.9.8, "Searching for Products"](#).
2. Select the radio button of the product you wish to update, and select the Update button. The Update Product: Details page appears.
3. Select the Sites hyperlink. The Update Product: Sites page appears, showing all site assignments for the product.
4. Use the *Included Sites* and *Excluded Sites* shuttle windows to flag which sites the product should be included in.
5. Select Apply to save changes.

8.9.6 Setting Content at the Product Level

You can use Oracle iStore's content component and media object functionality to map content (image files and HTML files) at the product level. Content mapped at the product level overrides all other mappings.

For more information on content components and media objects, see [Section 9.1, "Content Overview"](#).

Use the following procedure to set up content at the product level, using content component-media object relationships.

Steps

1. Log in to the Site Administration UI. Select Catalog > Products. Search for products, using the steps in [Section 8.9.8, "Searching for Products"](#).
2. Select the radio button of the applicable product. Select the Update button. The Update Product: Details page appears.
3. Select the Content hyperlink. The Update Product: Content page appears.

The Update Product: Content page lists existing (seeded and non-seeded) product-class content components. See [Section 9.2.1, "Seeded Content Components"](#), for a list of and descriptions of the seeded content components.

Note: Remember, if you use a non-seeded content component, you must modify the Display Template to use the new content component. See [Section D.1, "Advanced Content Tasks"](#), for more information.

4. In the list, find the content component that you wish to use, and map a media object to it: Select the content component's flashlight icon to launch the Search and Select: Media Object page.
5. In the Search and Select: Media Object page search for and select a media object. To select a media object, activate the radio button of the object and press the Select button.
6. Back in the Update Product: Content page, the media object selected in the previous step will be displayed in the textbox for the content component.
7. Press Apply to save changes.

You also can create new media objects by selecting the Create Media Object icon. See [Section 9.3.3, "Creating New Media Objects"](#), for instructions. After creating the new media object, you can assign the content source file to the media object directly from the Product Content page.

You also can select the Show Details hyperlink to show the content site/language mappings for the content and to add more content items.

In Show mode, you can:

- Select View Mapping to view any site/language mappings for the content associated to the media object. If no site/language mappings exist, then this button is de-active. A content file must be mapped to the media object before site/language mappings can be established.

- Select Add Content to add a content item to the media object in the Update Product: Add Content page. If no media object has been selected, then this button is de-active.
8. If you have not already done so, map a content source file to the media object you selected in the steps above. You can do this from this page by selecting the Add Content button. You also can map content from the Content > Media Objects pages.
 9. If desired, map different content items to specific site/language combinations. See [Section 9.3.4, "Assigning Content Items to Media Objects"](#), for instructions detailing how to add content source files to media objects.
 - Remember, the Display Template mapping for the product will determine whether the source file linked to the media object for the product can display. For the types of templates that can display product information, see [Section 8.7, "Product Display Templates"](#).

8.9.7 Setting Display Templates for Products

Use the following procedure to set the Display Template for a product.

Steps

1. Log in to the Site Administration UI. Select Catalog > Products. The Products page displays. Search for products, using the steps in [Section 8.9.8, "Searching for Products"](#).
2. Select the radio button of the product you wish to update, and select the Update button. The Update Product: Details page appears.
3. In the left area of the page, select the Display Template hyperlink. The Update Product: Display Template page appears.
4. In the *Select a Display Template for this product* LOV, select the Select a Display Template option and press Go.
5. Seeded product Display Templates will display in the gallery on the page. Select the radio button of the desired template. See [Section 8.7, "Product Display Templates"](#), for a list of seeded product display templates.
6. Press Apply to save changes.
7. Optionally, select the Preview button to preview the product display in the context of a specialty site. After you press Preview, all specialty sites in which this site is included will display -- limited to the specialty sites which support

your current session language. Select the desired specialty site to preview the product.

8.9.8 Searching for Products

Site administrators can perform both Simple and Advanced product searches.

Note: The product database in the Site Administration UI is based on products within the Inventory Organization that matches the value of the profile option, IBE: Item Validation Organization, and from categories within the default category set, specified by the profile option, IBE: Category Set.

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

See [Section 8.9.9, "Guidelines and Behavior of Product Search"](#), for more information.

Prerequisites

- Required implementation tasks have been performed. See [Chapter 4, "Implementation Tasks for Oracle iStore"](#).
- Products have been implemented. See [Section 7.1, "Products in Oracle iStore Overview"](#).

Steps

See [Section 8.9.8.2, "Steps for Advanced Search"](#), for advanced search steps.

8.9.8.1 Steps for Simple Search

1. Log into the Site Administration UI. Select Catalog > Products. The Products page displays.
2. Select either Product Name, Product Number, or Category from the Search LOV.
 - See [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for details on how these fields map to fields in Oracle Inventory.
3. Enter your search criteria in the Search textbox, using full or partial values. Use the percent sign (%) as a wildcard if desired. The search textbox is case

insensitive. See [Section 8.9.9, "Guidelines and Behavior of Product Search"](#), for more information.

4. Select the Enter key or press Go to launch the search.
5. A list of search results appears in the Products page.

You can sort the results by product number, product name, and creation date, by selecting the corresponding name in the table headings. For example, to sort by product number, select the Product Number heading in the table.

8.9.8.2 Steps for Advanced Search

1. Log into the Site Administration UI. Select Catalog > Products. The Products page displays.
2. Select the Advanced Search button.
3. Enter in the search textboxes the search criteria. Use the percent sign (%) as a wildcard if desired. The search textbox is case insensitive.

See [Section 8.9.9, "Guidelines and Behavior of Product Search"](#), for more information on product search behavior.

The searchable fields are:

- **Product Name** — Enter all or partial product name.
- **Product Number** — Enter all or partial product number.
- **Description** — Enter all or partial product description.
- **Category** — Enter all or partial Oracle Inventory category within the default category set.
- **Included Sites** — Select a site in which the product is included.
- **Start Date** — Use the calendar icon to select a product creation date.
- **End Date** — Use the calendar icon to select an end date for product creation.

See [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for details on how these fields map to fields in Oracle Inventory.

4. After entering your search criteria, select Go. A list of search results appears in the Products page.

You can sort the results by product number, product name, and creation date, by selecting the corresponding name in the table headings. For example, to sort by product number, select the Product Number heading in the table.

8.9.9 Guidelines and Behavior of Product Search

Keep the following guidelines and behavior in mind as you use the product search in the Site Administration UI.

- The product search in the Site Administration UI is based on products within the Inventory Organization that matches the value of the profile option, IBE: Item Validation Organization, and from categories within the default category set, specified by the profile option, IBE: Category Set.
- You can enter partial values and perform a search without using a wildcard, and the system will append the value you enter with a wildcard. Or you may use the percent sign (%) as a wildcard if desired, and the system will not append another wildcard.
- The search textbox is case insensitive.
- If the search textbox is left blank and the **Go** button is selected, a search for all values will be performed.

8.10 Configuring Bin Placement and Content

The Oracle iStore Customer UI catalog pages are sectioned into several templates that function as bins -- These bins can hold specific information (in the form of JSP files) and display it logically on the pages (left, right, top, and bottom). Some of the bins are automatically mapped to JSP files -- examples include the Browse Bin, the Global Bin, and the Welcome Bin. Others are left unmapped so that you can map your own JSP files. Of course, you also can change a seeded JSP mapping for a bin.

This section contains the following main topics:

- [Section 8.10.1, "Bins Overview"](#)
- [Section 8.10.2, "Configurable and Fixed Layout Available"](#)
- [Section 8.10.3, "Summary of Options for Changing Bin Placement and Content"](#)
- [Section 8.10.4, "Using Fixed Bin Layout"](#)
- [Section 8.10.5, "Using Configurable Bin Layout"](#)
- [Section 8.10.6, "Group Bins"](#)

- [Section 8.10.7, "Custom Group Bins"](#)

8.10.1 Bins Overview

Page types that have bins include:

- Section display pages
- Item detail display pages
- Shopping cart display page (Your Shopping Cart)
- User registration display pages

For a list of bins, see [Section E.3, "Seeded Bin Display Templates"](#).

All bins are separate logical templates available through Oracle iStore Template Manager; each has a display name and programmatic access name. The programmatic access name is used by Oracle iStore Display Manager at runtime to find mapped bin content. Remember, content must be mapped to the bin for it to display properly. See [Section 8.11, "Mapping Source Files to Display Templates"](#), for steps.

Note: Changes to seeded bins which are shipped without seeded content will not be overwritten during patching. If you add new mappings for a seeded bin, regardless of whether the bin has a seeded mapping or not, the change will be preserved during patching.

8.10.2 Configurable and Fixed Layout Available

Section page bins can be configured in two ways -- using Fixed Layout, where every catalog section page using the same Display Template shows the mapped bins in the same location on every page, or using Configurable Layout, where bins can be placed on the page of a specific section and in a specific location.

See the following topics within this section for more information:

- [Section 8.10.3, "Summary of Options for Changing Bin Placement and Content"](#)
- [Section 8.10.4, "Using Fixed Bin Layout"](#)
- [Section 8.10.5, "Using Configurable Bin Layout"](#)

More information on the fundamentals of Customer UI display can be found in [Section 8.1, "Understanding Customer UI Page Display"](#), and [Section 8.2, "Display Templates Overview"](#). Information on mapping center-page section templates can be found in [Section 8.5, "Section Templates Overview"](#).

See [Section E.3, "Seeded Bin Display Templates"](#), for a list of bins.

8.10.3 Summary of Options for Changing Bin Placement and Content

You can change bin placement or content in the following ways:

- **Profile Options** --- Change the profile options that are related to the catalog bins. Several profile options are supplied which alter the appearance and placement of sections and items. Note that section profile options control bins only when using Fixed Bin Layout. See: [Section A.7, "Other Customer UI Profile Options"](#), for a list of these profile options.
- **Fixed Bin Layout** --- Use bin Fixed Layout functionality, and associate your own JSPs with the seeded logical bin templates. See [Section 8.10.4, "Using Fixed Bin Layout"](#), for details.

Note: Several bins are seeded for the Site Home Page. For information on Site Home Page configuration options, see [Chapter 6, "Implementing Initial Customer UI Pages"](#).

- **Configurable Section Bin Layout** --- Use Configurable Layout for section bins, and associate targeted bin content to specific sections. This functionality is especially useful if using sites integrated with Oracle iSupport and/or Oracle Partner Management.

Note: Configurable Layout for bins is only available for the section pages -- not for shopping cart, product detail, or registration page bins. See: [Section 8.10.5, "Using Configurable Bin Layout"](#). When you use Configurable Layout for bins, you automatically will be choosing from a slightly different section Display Template gallery -- see [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#), for information.

8.10.4 Using Fixed Bin Layout

With Fixed Layout, all sections using the same Display Template share the same bin layout. For example, if you map the section bin, `STORE_CTLG_BIN_LEFT_1` template, to a JSP, then all section pages using the same template show the mapping for this bin in the same location. Of course, you can map different JSPs to site-language combinations to vary the content by site and language.

See the following for more details:

- [Section 8.10.4.1, "Section Page Bins"](#)
- [Section 8.10.4.2, "Item Detail Page Bins"](#)

- [Section 8.10.4.3, "Shopping Cart Page Bins"](#)
- [Section 8.10.4.4, "Registration Page Bins"](#)
- [Section 8.10.4.5, "Fixed Layout Bin Locations"](#)

See [Section E.3, "Seeded Bin Display Templates"](#), for lists of these templates.

8.10.4.1 Section Page Bins

In addition to the seeded Browse Bin, Global Bin, Welcome Bin (which have seeded content and display automatically), the section pages contain seven bins to the right and seven bins to the left of the center display page, as well as a top bin and a bottom bin. These bins do not have seeded content.

Following is a summary of the section bin layout:

- **Left bins** --- The following seven bins display to the left of the center display page, if mapped to source files: STORE_CTLG_BIN_LEFT_1 through STORE_CTLG_BIN_LEFT_7.
- **Right bins** --- The following seven bins displaying to the right of the center display page, if mapped to source files: STORE_CTLG_BIN_RIGHT_1 through STORE_CTLG_BIN_RIGHT_7.
- **Top bin** --- Following is the name of the top section bin template, which displays across the top of the section pages -- STORE_CTLG_SECTION_BIN_TOP.
- **Bottom bin** --- Following is the name of the bottom section bin template, which displays across the bottom of the section pages -- STORE_CTLG_SECTION_BIN_BOTTOM.

The section bins with seeded content can be turned on or off through profile options, when using fixed section layout. See [Section 6.4.1, "Bins on Site Home Page"](#).

8.10.4.2 Item Detail Page Bins

Item bins display along the sides, top, and bottom of the web page when a user views an item detail template. All seeded item bin templates share the same layout. You can customize the common item layout through profile option settings and template setup (in addition to this section, see [Section 8.4.1, "Section and Product Display Profile Options"](#), and [Section 8.7, "Product Display Templates"](#)). None of the item bins has a seeded JSP mapped.

Following is a summary of the item bins:

- **Left bins** --- The following seven bins display by default along the left side of the item detail display page: STORE_CTLG_ITEM_BIN_LEFT_1 through STORE_CTLG_ITEM_BIN_LEFT_7.
- **Right bins** --- The following seven bins display by default along the right side of the item detail display page: STORE_CTLG_ITEM_BIN_RIGHT_1 through STORE_CTLG_ITEM_BIN_RIGHT_7.
- **Top bin** --- STORE_CTLG_ITEM_BIN_TOP displays above the item detail display page.
- **Bottom bin** --- STORE_CTLG_ITEM_BIN_BOTTOM displays below the item detail display page.

8.10.4.3 Shopping Cart Page Bins

The Shopping Cart page contains bins which you can customize. None of the cart bins has a seeded JSP mapped.

Following is a summary of the shopping cart page bins:

- **Left bins** --- The following seven bins display by default along the left side of the shopping cart display page: STORE_CART_BIN_LEFT_1 through STORE_CART_BIN_LEFT_7.
- **Right bins** --- The following seven bins display by default along the right side of the shopping cart display page: STORE_CART_BIN_RIGHT_1 through STORE_CART_BIN_RIGHT_7.
- **Top bin** --- STORE_CART_ITEMS_BIN_TOP displays above the cart display page.
- **Bottom bin** --- STORE_CART_ITEMS_BIN_BOTTOM displays below the cart display page.

8.10.4.4 Registration Page Bins

The New User Registration page (ibeCRgdRegContainer.jsp) and subsequent registration information pages contain bins which you can customize. None of the registration page bins has a seeded JSP mapped.

Following is a summary of the registration page bins:

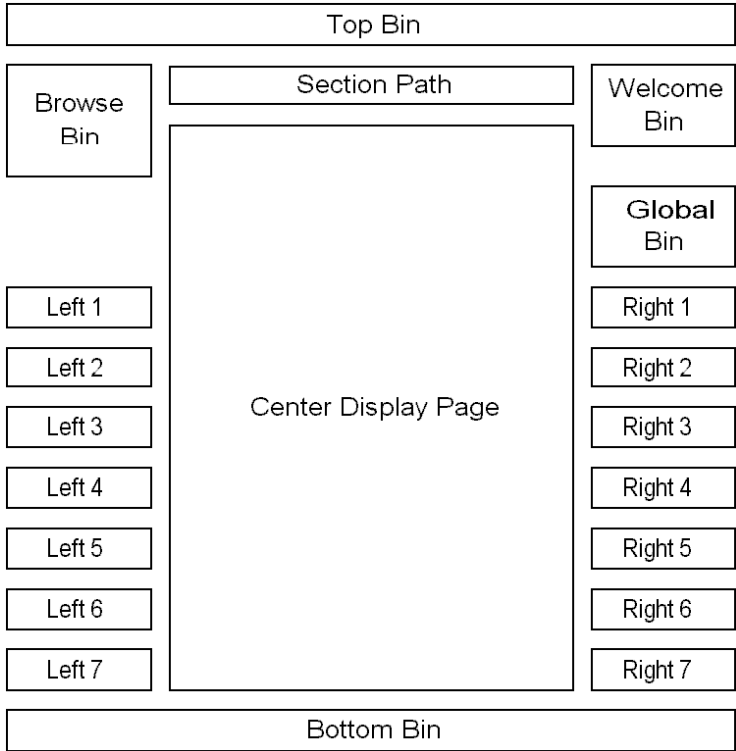
- **Left bins** --- The following three bins display by default along the left side of the registration display pages: STORE_REG_LEFT1_D through STORE_REG_LEFT3_D.

- **Right bins** --- The following three bins display by default along the right side of the registration display pages: STORE_REG_RIGHT1_D through STORE_REG_RIGHT3_D.
- **Top bin** --- STORE_REG_TOP_D displays above the registration display pages.
- **Bottom bin** --- STORE_REG_BOTTOM_D displays below the registration display pages.

8.10.4.5 Fixed Layout Bin Locations

The following graphic, [Figure 8–24, "Fixed Layout Bin Locations"](#), shows the default location for the Fixed Layout bin locations.

Figure 8–24 Fixed Layout Bin Locations



8.10.5 Using Configurable Bin Layout

Oracle iStore's Configurable Layout functionality allows you to display targeted bin content in different sections. See the following topics for more information:

- [Section 8.10.5.1, "Configurable Bin Layout Benefits and Behavior"](#)
- [Section 8.10.5.2, "Layout Components for Configurable Bin Layout"](#)
- [Section 8.10.5.3, "Configurable Bin Layout Steps"](#)

See also: [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#)

8.10.5.1 Configurable Bin Layout Benefits and Behavior

- For Oracle iSupport and Oracle Partner Management applications integrating with Oracle iStore's site management, this functionality allows implementers to map Partner Management-specific section page bins to Partner Management content, and support-specific section page bins to Oracle iSupport content.
- When you use configurable section layout you map layout components to seeded or custom templates. The templates that you map to the layout components must be linked to source JSP files, and their site-language mappings must be established.
- The Configurable Layout for bins feature provides additional customization abilities that allow you to provide your own templates and link them to sections through layout components. This cannot be done using Fixed Layout; with Fixed Layout, you must change the JSP mapping for hard-coded bins.
- Only bin templates within the Components for Section category are candidates for use with this functionality.
- If you create custom bin templates for use in Configurable Layout, be sure to save them to the Components for Section category.

Remember, you can associate a Display Template to a section only through the Display Template gallery.

8.10.5.2 Layout Components for Configurable Bin Layout

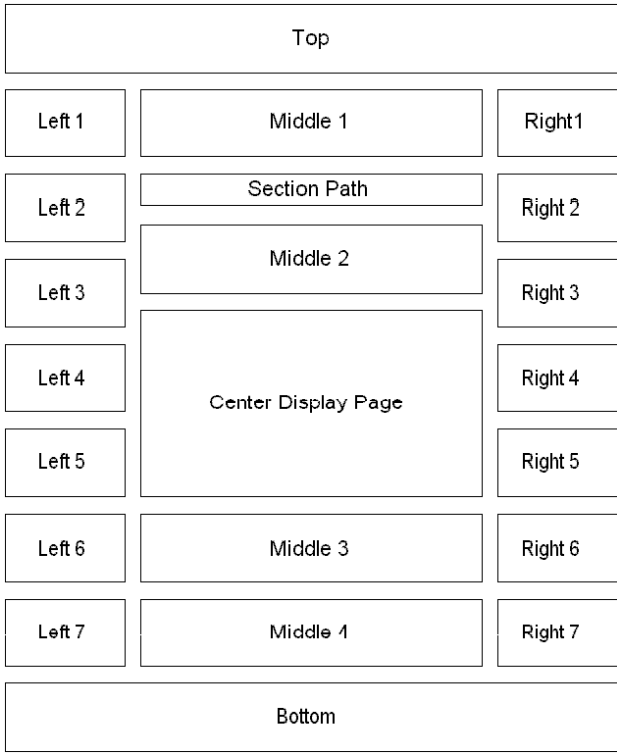
Following are the layout components available in configurable bin layout:

- **Left components** --- Seven layout components are available for display to the left of the section display page. In the layout component mapping pages, these are known as Left 1 through Left 7 layout components.

- **Right components** --- Seven layout components are available for display to the right of the section display page. In the layout component mapping pages, these are known as Right 1 through Right 7 layout components.
- **Middle components** --- Four middle bins are available as layout components. In the section template setup pages, these are known as Middle 1 through Middle 4. Middle 1 displays just below the Top bin, but above the Section path. Middle 2 displays just below the Section path but above the center display page. Middle 3 and 4 display below the center portion of the page.
- **Top component** --- A single top section layout component is available across the top of the section pages.
- **Bottom component** --- A single bottom section layout component is available across the bottom of the section pages.

The following figure, [Figure 8-25, "Component Locations in Configurable Layout"](#), shows the location of the components available in Configurable Layout.

Figure 8–25 *Component Locations in Configurable Layout*



8.10.5.3 Configurable Bin Layout Steps

Use the following procedure to set up a section using Configurable Layout components. See [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), for information on using the Fixed Layout feature.

Steps

1. Log in to the Site Administration UI. Select Catalog > Sections. The Catalog Hierarchy page lists all sections and subsections in the site hierarchy.
2. Select the radio button of the section for which you are using Configurable Layout. Select the Update button. The Update Section: Details page appears.
3. Select Templates > Layout > Configurable Layout.

Note: Though Oracle iStore does allow switching from configurable to fixed layout after components have been mapped, it not advisable to do so.

4. Under *Mapping*, select the search icon next to the desired component field. The Search and Select: Template page appears.
5. Search for templates within the Component for Section category. You may use the percent sign (%) as a wildcard in the template search utility.
6. Once you locate the appropriate template in the Search and Select: Template page, select the template and press the Select button to select the template.
7. Repeat to assign additional layout components to the section.
8. Optionally, select *Apply layout and mapping to all descendent sections* to apply this mapping to any subsections of this section.
9. Press Apply to save changes.
10. If necessary, map source files to the bin template assigned to each component used in the display. See [Section 8.11, "Mapping Source Files to Display Templates"](#), for steps.
11. Optionally, set up content file mappings at the site and language levels. See [Section 8.11, "Mapping Source Files to Display Templates"](#), for steps.

8.10.6 Group Bins

After assigning specialty sites to groups, you can set up bins which allow navigation to the specialty sites within the groups, by mapping the bins to the section pages of your choice using Configurable Layout. Oracle iStore seeds a group bin for each of these groups: Stores, Support, Partners.

Use the following steps:

1. Ensure that at least one specialty site has been assigned to a seeded group for the bin you wish to display.
2. Map one of the seeded group bins to the section of your choice using configurable section layout steps in [Section 8.10.5, "Using Configurable Bin Layout"](#). You can find details about the seeded site management bins in [Section E.3, "Seeded Bin Display Templates"](#).

See also: [Section 25.3.6, "Enabling the Support Group Bin"](#), and [Section 27.2.7, "Enabling the Partners Group Bin"](#)

The following figure, [Figure 8–26, "Stores Group Bin Example"](#), shows an example of how the Stores group bin might look in an implementation of Oracle iStore.

Figure 8–26 Stores Group Bin Example



8.10.7 Custom Group Bins

If you have created a custom group, use the following steps to set up the bin for the custom group:

1. Create a new group by modifying the Oracle AOL lookup code. For example, create NEW_GROUP. See [Section 15.6, "Modifying Oracle Application Object Library Lookups"](#), and [Section 15.6.4, "Site Group Names Lookup"](#).
2. Create a new Display Template for the new group, and register it in Template Manager. See [Section D.7.5, "Creating New Templates"](#), and [Section D.7.6, "Registering New Templates in the Template Manager"](#).
3. Re-use the existing out-of-box group bin JSP, `ibeCAcdGroupSiteBin.jsp`, and append the new group code parameter to this JSP (as `ibeCAcdGroupSiteBin.jsp?groupCode=NEW_GROUP`).
4. Map the new JSP file with the parameter to the new template, setting up specific site-language mappings if desired. See [Section 8.11, "Mapping Source Files to Display Templates"](#).
5. Map the new template (bin) to the desired location in the catalog, using Configurable Layout fir bins. See [Section 8.10.5, "Using Configurable Bin Layout"](#).

8.11 Mapping Source Files to Display Templates

Each template or bin used in the Customer UI must be mapped to a source JSP in order for it to display content. Remember, many of the Display Templates have seeded JSPs mapped to All sites and All languages. For these templates, you can

still map additional files and configure the files to display by site-language combination.

Important: Only JSP files are supported in this context. If you map other types of files, for example image files, the Customer UI will not function properly.

Use the following procedure to map JSP content to existing templates.

For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

Prerequisites

- An appropriate template has been created. You can use the seeded templates or create templates of your own.
- JSP source files have been created for each site-language combination that you wish to enable. Note that the mapping process will be easier if you have recorded the names of the source files you will enter in the Source File Name field, and have them readily available before this procedure.
- Store all of your source JSPs in the server's /OA_HTML/ directory.

Steps

1. Log in to the Site Administration UI. Select Advanced > Template Manager. The Templates page appears, listing all templates in the instance.
2. In the Templates page, select the Update icon for the template you are updating. The Update Template page appears.

In the Source File(s) area, a default source file will display for seeded templates that are being used to display content in the Customer UI. No source file will appear in this area if the template does not have a mapped source file.

Note that the default source file is used when no other site-language mappings have been set up.

3. Select Add Source File. The Add Source File page appears.
4. In the Add Source File page, enter the name of the source file in the Source File Name field.
5. Optionally, enter a description in the Description field.
6. In the File Mapping area, select a site from the Site LOV, using the following guidelines:
 - Select All if you wish the source file to be used for this template in all sites.

- If you wish the source file to be used for a specific site, select the site from the Site LOV.
- 7. Once you have selected either All or a specific site, the Language LOV will become active.
- 8. The Language LOV will display only those languages which are supported by the site. If a language has been disabled in the site setup pages, it will still appear in the Language list.
 - If you wish the source file to be used for all languages associated with the site chosen above, select All.
 - To map the source file to specific language supported by the selected site, select a language mapping from the Language LOV.
- 9. Press Apply to save changes.

8.12 Using Product Relationships

Product relationships potentially allow you to increase sales by creating associations between products. You can use the seeded relationship type Related to offer a related product to a customer. In the Customer UI product detail pages, the relationships show up near the product they are related to.

Without customization, you can set up any combination of Related relationships between products, sections, and categories. To use any of the other relationship types, you must customize the JSPs. See [Section D.4, "Advanced Product Relationships Procedures"](#), for more information.

Note that when you create associations between products and sections or categories, you are actually relating only the products within these categories and sections, not the categories or sections themselves. For example, if you set up a relationship between Product A and Section 1, Product A will be related to all of the products within Section 1. Likewise, if you set up an association between Category A and Category B, then it is the products within these categories that are associated in the Customer UI, not the categories themselves. If you wish to exclude some of the products within a related category or section, then you must use the exclusion feature. See [Section 8.12.2, "Using Relationship Product Exclusion/Inclusion Functionality"](#), for more information.

Display Templates to Show the Related Products

You must use one of the following seeded product Display Templates to display the Related relationship type:

- Product Detail Without Image
- Product Detail With Image

See [Section 8.7, "Product Display Templates"](#), for more information.

How to Map the Relationships

You can map relationships using one of two methods:

- **Relationship rules** created using the Oracle iStore rule builder --- See [Section 8.12.1, "Creating Relationships Using Mapping Rules"](#), for instructions.
- **SQL rules** to define relationships by querying the database on particular fields --- See [Section D.4, "Advanced Product Relationships Procedures"](#), for instructions.

Note: You cannot use both methods in a single relationship.

Caution: If you set up an SQL rule with a relationship type, you cannot delete it. You can, however, remove any mapping rules that you have set up.

Using the Relationships pages within the Site Administration UI, you can accomplish the following:

- Search for existing relationship types.
- View a list of all relationship types which exist in your organization's implementation.
- Access the Create Relationship page, where you can create a new relationship type.
- Access the Relationship Details page, where you can update existing relationship types and their mappings.
- Delete non-seeded relationship types.

8.12.1 Creating Relationships Using Mapping Rules

The mapping rules define relationships in a *From - To* form. The types of From and To objects can be:

- Oracle Inventory categories within the default category set

- Oracle Inventory products within the default category set
- Any type of Oracle iStore section

See also:

- [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#)
- [Section 7.3.4, "Categories Lists and Site Administration UI Behavior"](#)

Oracle iStore evaluates each mapping rule you set up and then populates database table rows where the relationships are maintained. For example, if you have a category with two products assigned in your *From* list and a section with four products assigned in your *To* list, then Oracle iStore creates a total of eight product relationships.

Use the following procedure to set up product relationships using mapping rules.

Note: Currently, only the Related relationship type is supported out-of-the-box.

Advanced relationship building information can be found in [Section D.4, "Advanced Product Relationships Procedures"](#).

Prerequisites

- Products have been set up to use in Oracle iStore. See [Chapter 7, "Implementing Products"](#), for details.
- Products in the relationship are mapped to one of the following seeded product Display Templates Product Detail Without Image or Product Detail With Image, in order to display the Related relationship type. See [Section 8.7, "Product Display Templates"](#), for information on these templates.
- An SQL rule has NOT been mapped to the seeded Related relationship type.

Steps

1. Log in to the Site Administration UI and select Catalog > Relationships. The Relationship page displays a summary of all relationships types in your implementation.

Note: Seeded relationship types will have a Remove icon that is de-active. Non-seeded relationship types will display a viable Remove icon next to them for removal of the relationship type.

2. Find the relationship type you wish to map: (Remember, only the Related relationship type is supported out-of-the-box.) For advanced procedures, see [Section D.4, "Advanced Product Relationships Procedures"](#).

- a. In the Search by Relationship Name textbox, enter the name of the relationship and select Go to launch the search.
 - b. Or, scroll through the list of relationship types and find the relationship type.
3. Select the Update icon for the relationship type you are updating. The Relationship Details page appears.
4. Optionally, use the calendar icon in the Effective Date From and Effective Date To fields to set up dates when the relationship type will be valid.

If no mapping rule or SQL rule exists for the relationship type, the Rule Type LOV will allow you to select either Create Mapping Rules or Create a SQL Rule. If mapping rules have already been set up for the relationship type, the mapping rules will display in the Mapping Rule table.

Important: If an SQL rule has been set up for this relationship type, you cannot create mapping rules for it. Select one of the following from the Rule Type LOV:

- a. **Create Mapping Rules** to use Oracle iStore rule builder, and follow the remaining steps in this procedure.
 - b. **Create a SQL Rule** to specify an SQL query. See [Section D.4.4, "Creating Relationships Using SQL Rules"](#), for instructions.
5. Select Apply. The relationship type has been created. The Relationship Detail page opens, where you can begin adding rules to the relationship type.
6. Press Apply. The screen refreshes. Rule Type LOV is changed to display MAPPING.
7. Select Add Rules. The Add Rules page opens.
8. In Add Rules page, in the *From* and *To* LOVs, select the desired category, product, and section mappings, using the information below as a guide:
 - **Category** --- Rule starts/ends at an Inventory category within the default category set. Use the flashlight icon to launch the Search and Select: Categories page.
 - **Product** --- Rule starts/ends at a product. Use the flashlight icon to launch the Search and Select: Products page.
 - **Section** --- Rule starts/ends at a section. Use the flashlight icon to launch the Search and Select: Catalog Sections page.

Use the percent sign (%) as a wildcard in the search pages.

Remember, you are creating associations between only the products within the categories and sections, not the categories or sections themselves.

9. Select Apply to save changes.
10. Back in the Relationship Details page, you also may select View Results to view a list of all product-to-product relationships that exist for the relationship type. In the Product Relationships page that appears, you can exclude specific products from the mapping or include products that have previously been excluded. See: [Section 8.12.2, "Using Relationship Product Exclusion/Inclusion Functionality"](#).

8.12.2 Using Relationship Product Exclusion/Inclusion Functionality

Once you have set up a mapping rule for a relationship type, you may wish to exclude specific products from the rule.

For example, you have set up a mapping from Product A to Category 1. Since the mapping will create relationships from Product A to all of the products in Category 1, you may wish to flag certain products as excluded from the relationship mapping rule. Use the following procedure.

Prerequisites

- A mapping rule has been created in which multiple products are captured.

Steps

1. Log in to the Site Administration UI and select Catalog > Relationships. The Relationship page displays a summary of all relationships types in your implementation.
2. Find the desired relationship type and select the Update icon to access the Relationship Details page. The mapping rules will display in the Mapping Rule table.
3. Select the View Results button. The Product Relationships page appears. The Results table will display all of the product relationships created by the mapping rule associated with the relationship type which you are updating.

Remember, Oracle iStore sets up a relationship for each product involved in the rule. For example, if you have a category with two products assigned in your *From* list and a section with four products assigned in your *To* list, then Oracle iStore creates a total of eight product relationships.

Products which are excluded will display a checkmark in the Excluded column.

4. To exclude a product or products from the mapping rule, select the Select checkbox of the appropriate products and press the Exclude button.

A checkmark will appear for the product(s) in the Excluded column of the table.

5. To re-include a product or products that have previously been excluded from the mapping rule, select the Select checkbox of the appropriate product(s) and press the Include button.

The checkmark in the Excluded column will disappear for the selected product(s).

8.13 Setting up Section Display Templates Text Messages

Two seeded Oracle iStore section Display Templates come with three non-usable FND_MESSAGES seeded as part of their display. If you use either of these section templates and their associated JSPs in a specialty site, you will want to change the seeded text messages.

The template gallery in the Sections pages display these templates as:

- [Product Multi-Select](#)
- [Product Multi-Select with Section Links](#)

If not altered, the seeded text messages will appear in these two templates as:

- Enter product header 1 alternative 1
- Enter product header 1 alternative 2
- Enter product header 3 alternative 1

The following table, [Table 8–1, "Section Templates Requiring Text Message Setup"](#), summarizes the names of the template JSP source files, their programmatic access names, and their descriptions.

Table 8–1 Section Templates Requiring Text Message Setup

Source File (JSP)	Programmatic Access Name	Description
ibeCCtdFSuStMs2I.jsp	STORE_CTLG_FSUBSCT_MULT_2COL_INCL	Non-leaf section featured products with multiple select two columns
ibeCCtdFSuStMs3I.jsp	STORE_CTLG_FSUBSCT_MULT_3COL_INCL	Non-leaf section featured products with multiple select three columns

The following table, [Table 8–2, "Text Messages for Section Templates Requiring Text Message Setup"](#), summarizes the referenced source files (JSPs), the seeded message display text, and the seeded programmatic access names for the seeded messages.

Table 8–2 Text Messages for Section Templates Requiring Text Message Setup

Seeded Message(s) Display Text	Source File (JSP)	Programmatic Access Name
Enter product header 1 alternative 2 (Displays at the top of the left-hand column.)	ibeCCtdFSuStMs2I.jsp	IBE_PRMT_CT_PRODUCT_HDR1_ALT2
Enter product header 1 alternative 1 (Displays at the top of the left-hand column.)	ibeCCtdFSuStMs3I.jsp	IBE_PRMT_CT_PRODUCT_HDR1_ALT1
Enter product header 3 alternative 1 (Displays at the top of the right-hand column)	ibeCCtdFSuStMs3I.jsp	IBE_PRMT_CT_PRODUCT_HDR3_ALT1

Stored in Oracle Applications Message Dictionary, these messages are seeded in the FND_NEW_MESSAGES table.

Use the steps below to alter the display text.

8.13.1 Modifying the Seeded Text Messages for Templates

Use the following procedure to change the text of the seeded messages that display on ibeCCtdFSuStMs2I.jsp and ibeCCtdFSuStMs3I.jsp.

Steps

- 1. Log in to Oracle Forms with the Application Developer responsibility.
- 2. Open the Messages window by choosing Application > Messages.
- 3. Open the Messages search window by choosing View > Find.
- 4. In the Find field, enter IBE_PRMT_CT_PRODUCT_HDR% and select Find.

The programmatic names of the three seeded messages will display in the Messages search results window.

- 5. Select the message that you want to modify and select OK. The Messages window is populated with the selected message.
- 6. In the Current Message Text area, select the seeded text and replace with your preferred text.

7. Save the form.

Guidelines

- Remember, alter these specific text messages only if you are using one of the following section Display Templates: [Product Multi-Select](#) or [Product Multi-Select with Section Links](#).
- It is recommended that you bounce the Apache server after making these changes.

Implementing Content

This chapter contains information on how implement content display in the Oracle iStore 11*i* Customer UI pages, without customization.

Note: This chapter assumes you have performed the mandatory setups listed in:

- [Chapter 2, "Verify Mandatory Dependencies"](#)
- [Chapter 4, "Implementation Tasks for Oracle iStore"](#)
- [Chapter 7, "Implementing Products"](#)

Advanced display techniques --- including limited customizing information --- can be found in [Appendix D, "Advanced Display"](#).

Information on building the section and product catalog for the Customer UI can be found in [Chapter 8, "Implementing the Catalog"](#).

Main topics in this chapter include:

- [Section 9.1, "Content Overview"](#)
- [Section 9.2, "Understanding Content Components"](#)
- [Section 9.3, "Understanding Media Objects"](#)
- [Section 9.4, "Using the Content Repository"](#)

9.1 Content Overview

Oracle iStore features reusable content tools which allow you to present content in the Customer UI. These content tools let you map content source files which appear in the Customer UI, allowing you to provide more than just the section or product description information. The content you present in the Customer UI can be images, HTML files, or text messages.

The content tools also allow you to set default content based on Oracle Inventory categories. See [Section D.5.1, "Configuring Product Presentation at the Category Level"](#), for more information.

See also: [Section 9.1.1, "How Oracle iStore Determines Which Content to Display"](#).

The following content functionality is available in Oracle iStore:

- **Content Components** --- These are logical placeholders in the Display Templates for content associated to media objects. See [Section 9.2, "Understanding Content Components"](#), for more information.
- **Media Objects** --- Media objects are logical bridges that connect content component placeholders with source files to present images or HTML content in the Customer UI. Some media objects do not need to be linked to content components in order to be useful. See [Section 9.3, "Understanding Media Objects"](#), for more information.
- **Content Repository** --- The Content Repository allows you to view and upload the actual files that provide the content for your specialty site pages. See [Section 9.4, "Using the Content Repository"](#), for more information.

Integration with Oracle Content Manager can provide additional content capabilities. This optional integration is discussed in [Chapter 24, "Integrating Oracle iStore with Oracle Content Manager"](#).

Topics in this section include:

- [Section 9.1.1, "How Oracle iStore Determines Which Content to Display"](#)
- [Section 9.1.2, "Media Objects and Content Components Classes"](#)
- [Section 9.2.1, "Seeded Content Components"](#)
- [Section 9.3.1, "Using Media Objects to Present Message Text"](#)
- [Section 9.3.2, "Seeded Media Objects"](#)

9.1.1 How Oracle iStore Determines Which Content to Display

In some cases, the content you map for display in your specialty sites can overlap with content set at other levels. For example, you may set category-level default content, but then also set product-level content for a specific product. Oracle iStore follows certain rules for determining which content to display, based on the following three main levels:

- [Product-Level Content](#)

- [Category-Level Content](#)
- [Site- and Section-Level Content](#)

Oracle iStore checks for and then prioritizes the content display as follows:

1. If iStore finds content defined at the product-level, it displays it first. If no product-level content is found, category-level default content is used.
2. If iStore finds content defined at section-level, it displays it. Otherwise, site-level content is used.
3. If no content exists for any of the other levels, then site-level default content is used.

Note: Only the content components whose Class designation is Section will show in the Section Content page, and only those content components whose Class designation is Product will show in the Product Content page. Normally, the media object associated with a content component in Sections page can not be used by a product.

9.1.1.1 Product-Level Content

Product-level content occurs when, in the Products > Content page, you link content components to media objects, which are in turn mapped to content files. Oracle iStore always uses the product-level content in favor of any other associations to content defined at other levels.

9.1.1.2 Category-Level Content

Content associated with a product category will use the category-level mapping instead of site-level.

9.1.1.3 Site- and Section-Level Content

The rules that determine the display of section-level content has two levels: site-level and section-level.

- **Section-Level Content** --- Section-level content occurs when, in the Sections > Content pages, you create an association between a section content component and a media object. Again, the content that actually displays in the Customer UI is determined by the content files linked to the media object and any site/language mappings for the content files. If this level of association is not made, then Oracle iStore uses the site-level content.

The content components available in the Sections > Content page are those that apply to section display.

- **Site-Level Content** --- When you map a content component to a media object in the Advanced > Content Component screens, you are choosing a default media object at site level. Of course, the content that actually displays in the Customer UI is determined by the content files linked to the media object and any site/language mappings for the content files.

Site -level content is only presented if no product, category, or section associations exist.

9.1.2 Media Objects and Content Components Classes

Media objects and content components are categorized by **Class**, based on their content purpose. For lists of the classes, see:

- [Section 9.1.2.1, "Seeded Content Component Classes"](#)
- [Section 9.1.2.2, "Seeded Media Object Classes"](#)

Content components of any class can be associated to any class of media object, and vice versa. Oracle iStore does not perform any validation of the classes; however, as a best practice, it is recommended that you use matching classes together.

By default, when the Search and Select: Media Objects page is retrieved from the content component mapping screens, the media objects LOV contains media objects of the same class as the content component being mapped.

9.1.2.1 Seeded Content Component Classes

The class designation of content components can be updated **only** for non-seeded content components for which there are no existing media object assignments.

Seeded content components classes are:

- **Product** -- For content components which display product content
- **Section** -- For content components which display section content
- **Section and Product** -- For content components which display both product and section content

9.1.2.2 Seeded Media Object Classes

The class designation of media objects can be updated **only** for non-seeded media objects -- i.e., media objects that you create. For seeded media objects, the class is read-only.

Seeded media objects classes are:

- **Product** -- For media objects which display product content
- **Section** -- For media objects which display section content
- **Section and Product** -- For media objects which display both product and section content
- **Message** -- For media objects which are text messages

Note: Seeded message-class media objects can be called directly from some Display Templates, without having to first be mapped to a content component
- **Others** -- For all other classes of media objects, and for backward compatibility
- **Logo** -- For the display of logo-type elements of the web pages

9.1.2.3 Media Object Classes and iStore JSP Calls

All classes of the media objects can be called directly from the template by using the API, `DisplayManager.getMedia(<accessName>)`. This, however, requires customizing the JSPs.

As a best practice, to avoid having to customize the JSPs, use the seeded media objects with class of Product, Section, or Section and Product, with the seeded content components that match these categories.

The seeded media objects of classes, Others and Logo, are called directly from the JSPs. Therefore, for these classes, you do not need to map them to content components in order for them to display.

The media objects of class, Message, are called directly by using the API, `DisplayManager.getTextMediaOrFndMsg()`.

A list of seeded media objects can be found in [Section E.22, "Media Objects"](#).

See also:

- [Section 9.3.0.7, "Media Objects Guidelines and Behavior"](#)
- [Section 9.3.1.1, "Message-Class Media Objects Guidelines and Behavior"](#)

9.1.2.4 Class Name and Description Lookup

The class name for media objects and content components is defined as extensible lookup in Oracle Application Object Library (AOL). This means you can add additional lookup names and definitions, or change the existing ones, through the Oracle Forms interface.

The name of the lookup is IBE_M_MEDIA_OBJECT_APPLI_TO. For directions on how to modify seeded lookups, see [Section 15.6, "Modifying Oracle Application Object Library Lookups"](#).

9.2 Understanding Content Components

Oracle iStore's seeded Display Templates contain programmatic access names of specific content components. The content components are placeholders in the templates that expect a certain type of content. Content components define the types of media objects that can display on a web page. All but the Message, Other, and Logo classes of media objects must be linked to a content component in order to present content in the Customer UI. A template's category or type determines which of the seeded content components it may call.

You can set up content component-media object mappings using the following paths:

- **Catalog > Sections > Content** --- For steps, see [Section 8.8.5, "Adding Content to Sections"](#).
- **Catalog > Products > Content** --- For steps, see [Section 8.9.6, "Setting Content at the Product Level"](#).
- **Advanced > Content Components** --- For steps, see [Section D.1.2, "Assigning Media Objects to Content Components at the Site Level"](#).
- **Advanced > Categories > Assign Content** --- For steps, see [Section D.5.1, "Configuring Product Presentation at the Category Level"](#).

Each media object also must link to at least one content source file. See [Section 9.3, "Understanding Media Objects"](#), for more information.

9.2.1 Seeded Content Components

The following are the seeded content components:

- **Product Large Image** --- See [Section 9.2.1.1, "Product Large Image"](#)
- **Product Small Image** --- See [Section 9.2.1.2, "Product Small Image"](#)

- **Product Additional Information** --- See [Section 9.2.1.3, "Product Additional Information"](#)
- **Section Small Image** --- See [Section 9.2.1.4, "Section Small Image"](#)
- **Section Additional Information** --- See [Section 9.2.1.5, "Section Additional Information"](#)
- **Section Additional Information 1 Through 5** --- See [Section 9.2.1.6, "Section Additional Information 1 Through 5"](#)

See [Section 8.6, "Section Templates"](#), and [Section 8.7, "Product Display Templates"](#), for lists of section and product display templates.

Remember, out-of-the-box, all of the content components must be linked to media objects -- which in turn must be mapped to content files -- to present content.

9.2.1.1 Product Large Image

Use this content component to display a product large image in templates which display this content component. The templates that display this content component are the following **product** display templates:

1. Product Basic Information with Image --- See [Section 8.7.0.4, "Product Basic Information with Image"](#)
2. Product Detail with Image --- See [Section 8.7.0.5, "Product Detail with Image"](#)
3. Product Detail with Services --- See [Section 8.7.0.7, "Product Detail with Services"](#)

As a best practice, use with product-class media objects. The programmatic access name is `STORE_PRODUCT_LARGE_IMAGE`.

9.2.1.2 Product Small Image

Use this content component to display a product small image in templates which display this content component. The templates that display this content component are the following **section** display templates within the Section Contains Products Only and Section Contains Featured Subsection categories:

1. Product Detail --- See [Section 8.6.3.1, "Product Detail"](#), and [Section 8.6.5.1, "Product Detail"](#)
2. Product Detail Multi-Select (only within Section Contains Products Only category) --- See [Section 8.6.5.3, "Product Detail Multi-Select"](#)
3. Product Detail with Image --- See [Section 8.7.0.5, "Product Detail with Image"](#)

4. Product Detail with Services --- See [Section 8.7.0.7, "Product Detail with Services"](#)

As a best practice, use with product-class media objects. The programmatic access name is `STORE_PRODUCT_SMALL_IMAGE`.

9.2.1.3 Product Additional Information

Use this content component to display additional information for a product in templates which display this content component. The templates that display this content component are the following **product** display templates:

1. Product Detail with Image --- See [Section 8.7.0.5, "Product Detail with Image"](#)
2. Product Detail without Image --- See [Section 8.7.0.6, "Product Detail without Image"](#)
3. Product Detail with Services --- See [Section 8.7.0.7, "Product Detail with Services"](#)

As a best practice, use with product-class media objects. The programmatic access name is `STORE_PRODUCT_ADDTL_INFO`.

9.2.1.4 Section Small Image

Use this content component to display a small image for a section in templates which display this content component. The templates that display this content component are the following **section** display templates:

1. Subsection List with Product Detail within Section Contains Navigational Subsections Only --- See [Section 8.6.4.4, "Subsection List with Product Detail"](#)
2. Subsection List with Product Pull-Down within Section Contains Navigational Subsections Only --- See [Section 8.6.4.5, "Subsection List with Product Pull-Down List"](#)
3. Product Detail within Section Contains Products Only --- See [Section 8.6.5.1, "Product Detail"](#)
4. Product Pull-Down within Section Contains Products Only --- See [Section 8.6.5.2, "Product Pull-Down"](#)
5. Multilevel Subsections List with Content within Component for Section Containing Navigational Subsections Only (configurable layout) --- See [Section 8.6.6.1, "Multilevel Subsection List with Content"](#)
6. Section Detail with Content within Components for Section Containing Products Only (configurable layout) --- See [Section 8.6.7.1, "Section Detail"](#)

As a best practice, use with section-class media objects. The programmatic access name is `STORE_SECTION_SMALL_IMAGE`.

9.2.1.5 Section Additional Information

Use this content component to display additional information at the section level, in templates which display this content component. The templates that display this content component are the following **section** display templates:

- Section Contains Featured Subsection category:
 1. Product Detail --- See [Section 8.6.3.1, "Product Detail"](#)
 2. Product Multi-Select --- See [Section 8.6.3.2, "Product Multi-Select"](#)
 3. Product Multi-Select with Section Links --- See [Section 8.6.3.3, "Product Multi-Select with Section Links"](#)
- Section Contains Navigational Subsections Only category:
 4. Subsection List --- See [Section 8.6.4.1, "Subsection List"](#)
 5. Subsection List 2 --- See [Section 8.6.4.2, "Subsection List 2"](#)
- Section Contains Products Only category:
 6. Product Pull-Down --- See [Section 8.6.5.2, "Product Pull-Down"](#)
 7. Product Multi-Select --- See [Section 8.6.5.4, "Product Multi-Select"](#)
 8. Product Multi-Select with Drill-Down --- See [Section 8.6.5.5, "Product Multi-Select with Drill-Down"](#)
- Component for Section Containing Navigational Subsections Only (configurable layout) category:
 9. Multilevel Subsections List with Content --- See [Section 8.6.6.1, "Multilevel Subsection List with Content"](#)
- Components for Section Containing Products Only (configurable layout) category:
 10. Section Detail with Content --- See [Section 8.6.7.1, "Section Detail"](#)

As a best practice, use with section-class media objects. The programmatic access name is `STORE_SECTION_ADDTL_INFO`.

9.2.1.6 Section Additional Information 1 Through 5

The content components, Section Additional Information 1 through Section Additional Information 5, display in the following two section templates:

1. Multilevel Subsections List with Content -- See [Section 8.6.6.1, "Multilevel Subsection List with Content"](#)
2. Section Detail -- See [Section 8.6.7.1, "Section Detail"](#)

Programmatic access names:

- STORE_SECTION_ADDTL_INFO1
- STORE_SECTION_ADDTL_INFO2
- STORE_SECTION_ADDTL_INFO3
- STORE_SECTION_ADDTL_INFO4
- STORE_SECTION_ADDTL_INFO5

9.3 Understanding Media Objects

In Oracle iStore, media objects allow you to present content in the Customer UI beyond the name and description information provided through the section and product catalog functionality. For example, you can map an image file to a media object, and then link the media object to a content component at the product level.

Types of content allowed include image files, HTML files, and text messages. You can configure the content to display at the product or section level. You also can set up content to display at the Inventory category level, or at the site level.

The multi-layer structure allows you to reuse a single media object in several different areas, by associating different content source files to different combinations of sites and languages.

9.3.0.7 Media Objects Guidelines and Behavior

Following is the behavior of media objects, and some guidelines:

- Each media object links to at least one content source file. This source file presents the content. For example, you link an image file such as a .gif to a media object, and the .gif provides the actual content, while the media object provides the display logic. In addition to this association, the template must be able to find the media object to display the content. Templates can find media objects either directly or through content components, depending on the media object used.

- Most of the commonly used media objects (all but Message-class, Other-class, and Logo-class media objects) must be linked to a content component to be usable in the Customer UI.
- Media object associations can be made at the site, section, product, or Inventory category levels. See [Section 9.1, "Content Overview"](#), for more information.
- By default, a media object's content source file is linked to All sites and All languages. However, in the case of a multi-site and/or multi-language implementation, content items can be mapped to site and language combinations to present specific content for different sites and languages.
- Media objects can use as their source files the following file types:
 - *image files* -- examples include: .jpg, .gif, .bmp
 - *HTML files* -- examples include: .htm, .HTML
 - *text messages* --- see [Section 9.3.1, "Using Media Objects to Present Message Text"](#), for more information.
- Each seeded media object has a programmatic access name. For media objects called directly from the templates, the templates use this programmatic access name to call the media object and display its content. In the case of a media object linked to a content component, the template calls the content component's programmatic access name, not the media object's --- so in this case, a media object's programmatic access name is not used.
- During upgrades, Oracle iStore does not alter custom media objects and their file mappings. In the event a default (All sites-All languages) mapping has been changed for a media object by implementers, Oracle iStore's patching script uses the last_updated_by data (which is generated whenever seeded data is altered) to avoid overwriting custom data.

[Section 9.3.4, "Assigning Content Items to Media Objects"](#), contains steps to associate content items (files) to media objects.

9.3.1 Using Media Objects to Present Message Text

Oracle iStore ships with hundreds of Customer UI text messages, and several of these text messages are presented in the Media Objects pages as messages that you can map as content to individual sites.

Text messages for Oracle iStore are stored in the Oracle Application Object Library (AOL) schema. More information about these can be found in [Chapter 15, "Implementing Messages and Prompts"](#).

You map new content for the message-class media objects in the same way as other media objects, although the behavior is somewhat different. Use the steps in [Section 9.3.4, "Assigning Content Items to Media Objects"](#), to assign new content to the message-class media objects. See [Section 9.3.1.1, "Message-Class Media Objects Guidelines and Behavior"](#), below, for details about the behavior and guidelines.

The following table, [Table 9–1, "Oracle AOL Text Messages Seeded as Media Objects of Message Class"](#), shows the AOL messages that are also media objects.

Table 9–1 Oracle AOL Text Messages Seeded as Media Objects of Message Class

Media Object Name	Programmatic Access Name	Description	Default Text
Tax Message 1	IBE_PRMT_ORD_IS_IT_TAXABLE	Prompts the user whether the order is taxable or not. Located in ibeCPmdPmtOptions.jsp, Payment and Billing Information Page	Is this Order Taxable?
Payment book PO message	IBE_PRMT_PMTBK_PO_MSG	Payment book PO message. Located in ibeCPmdPmtOptions.jsp, Payment and Billing Information Page (purchase order payment option)	If you have a purchase order, please enter Purchase Order Number:
New credit card message	IBE_PRMT_ORD_NEW_CREDIT_CARD	New credit card message. Located in ibeCPmdPmtOptions.jsp, Payment and Billing Information Page (new credit card payment option)	New Credit Card
Payment book fax credit card message	IBE_PRMT_PMTBK_FAX_CC_MSG	Payment book fax credit card message. Located in ibeCPmdPmtOptions.jsp, Payment and Billing Information Page (fax credit card payment option)	Print and fax your completed Order Confirmation page to 123-456-7890
Order Confirmation Message 1	IBE_CHKOUT_ORD_CONFIRM_TEXT	Prompts the user to note order information.	Please print this page and keep it for your records. If you are faxing your credit card number or purchase order, remember to complete the Faxed Order section below before faxing.

Table 9–1 Oracle AOL Text Messages Seeded as Media Objects of Message Class

Order Confirmation Message 2	IBE_CHKOUT_ORD_FAX_PO_MSG	Prompts the user on the Order Confirmation page for Purchase Order and fax.	Please fill in the blanks and fax us this Order Confirmation page and Purchase Order.
Help message	IBE_PRMT_HELP_MESG_G	<p>Message for online help. Located in ibeCZzdHelp.jsp, Help Desk Index Page (customer service contact information, such as telephone numbers and e-mail addresses)</p> <p>You can customize ibeCZzdHelp.jsp or create a new JSP and map it to the template with the programmatic access name STORE_CUSTOM_HELP. ibeCZzdHelp.jsp includes the template with the programmatic access name STORE_CUSTOM_BOTTOM.</p>	This is the help area to be customized by merchant.
iStore System Saved Cart Name	IBE_PRMT_SC_DEFAULTNAMED	<p>Default cart name for system-saved carts.</p> <p>Displays in cart-related JSPs.</p>	Store Saved
iStore Unnamed Cart Name	IBE_PRMT_SC_UNNAMED	<p>Default name for unsaved carts</p> <p>Displays in cart-related JSPs.</p>	Store

9.3.1.1 Message-Class Media Objects Guidelines and Behavior

Following are guidelines and behavior for message-class media objects:

- If you associate a message-class media object with a source file and map it to All sites and All languages, you override the Oracle AOL text mapping for the message. To avoid this, you can associate the message-class media object with a source file and map it to a specific site-language combination. In this case, the Oracle AOL text mapping will still remain at the All Sites-All Languages level.
- When providing different message content for sites in different languages, several content files can link to one media object to present the messages in different languages. For example, if you are using a text file, text_eng.txt, mapped to All sites/English language, and text_kor.txt mapped to All sites/Korean language, you only need to use one media object for both source files.

- The tables that contain the message-class media object information and the AOL text messages are not synced. Therefore, if you update AOL messages in Forms, they will not appear as updated in the Site Administration UI Media Object pages, and vice versa.
- Message-class media objects do not need to be associated with content components in order for them to display in the Customer UI.
- Each message-class media object has a programmatic access name which the Display Template uses to display the message.

See also: [Chapter 15, "Implementing Messages and Prompts"](#)

9.3.2 Seeded Media Objects

For a list of seeded media objects, see [Appendix E, "Display Templates and Media Objects"](#).

9.3.3 Creating New Media Objects

You may wish to create new media objects, if the seeded ones do not meet your business requirements. Use the steps below.

Directions on how to assign Section and Product content components to media objects can be found in [Section 8.8.5, "Adding Content to Sections"](#), and [Section 8.9.6, "Setting Content at the Product Level"](#).

Steps

1. Log in to the Site 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 following figure, [Figure 9–1, "Create Media Object Icon"](#), shows the Create Media Object icon:

Figure 9–1 Create Media Object Icon

2. In the Create Media Object page, enter the following information:
 - a. **Media Object Name** --- Enter a descriptive name for the media object. This name will not appear in the Customer UI.
 - b. **Programmatic Access Name** --- Enter a value in the textbox, using the following guidelines:
 - If this will be a media object used with a content component, then the value entered here will be used for your own internal business purposes.
 - If this will be a media object used without a content component (e.g., called directly from a Display Template), then this name must be unique and entered into the Display Template call to the media object. See [Appendix D, "Advanced Display"](#), and the *Oracle iStore API Reference Guide* for details on how to customize the Display Templates.
 - c. **Keywords** --- Optionally, enter keywords if desired, separated by commas. After you enter them in the system, you can search by keywords using the media object search utility.
 - d. **Description** --- Optionally, enter a description for the media object. This description will not appear in the Customer UI, and is for your internal business purposes only.
 - e. **Class** --- Select a class for the media object, based on its display purpose. See [Section 9.1.2, "Media Objects and Content Components Classes"](#), for guidelines.
3. Press Apply to save changes.

The following figure, [Figure 9–2, "Create Media Object Page"](#), shows the Create Media Object screen.

Figure 9–2 Create Media Object Page

Create Media Object

* Indicates required field

* Media Object Name

* Programmatic Access Name

Keywords

Description

* Class

- Section and Product
- Message
- Product
- Logo
- Others
- Section

9.3.4 Assigning Content Items to Media Objects

Each media object you use in your sites must link to at least one content item. Additionally, you can create site/language mappings linking different content items to different sites and their supported languages.

Use this procedure to assign a content item to a media object and map a site and language combination to the content item.

Steps

1. Log in to the Site Administration UI and select Content > Media Objects. The Media Objects page appears. Search for media objects, using the % sign as a wildcard if desired.
2. In the Media Objects page, select the Update icon for the media object to which you are mapping the content item. The Update Media Object page appears.
 Optionally, in this page you can update the basic information about the media object, such as name, keywords, and description.
3. Select 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 the flashlight icon next to the Source File Name textbox to launch the Search and Select: Source Files page.
5. In the Search and Select: Source Files page, find and select a content source file from the Content Repository. Select a source file by activating its radio button and pressing the Select button.

If you have not yet uploaded the source file to the Content Repository, then, in the Add Content page, press the Upload button next to the Source File Name textbox to upload the source file. Browse for and select the source file from the file system. See [Section 9.4, "Using the Content Repository"](#), for more information.

6. Map to site: In the Add Content page, in the Source File Mapping area, select from the Site LOV the site that this source file should be mapped to.

To map the content to all sites and all languages, select **All**.

7. Once you have selected a site, the Language LOV in the table will become available, showing all languages supported by the selected site. Use the Language LOV to select the appropriate language for the source file.
8. Press Apply to save changes. The media object is now mapped to the content file.
9. Optionally, select the View Mapping button to retrieve a list of site-language mappings for the media object.

9.4 Using the Content Repository

Oracle iStore's Content Repository is a tool that allows source files to be readily available to you for use as content for media objects. You must first upload files from your local file system to the database before they become available in the repository.

The files are uploaded into the database (FND_LOBS table), not to the file system of the server.

Note: The functionality of the Content Repository is impacted by a profile option -- See [Section 9.4.2, "Understanding IBE: Use Database for Media Storage"](#), below, for details.

Topics in this section include:

- [Section 9.4.1, "Content Repository Overview"](#)
- [Section 9.4.2, "Understanding IBE: Use Database for Media Storage"](#)
- [Section 9.4.3, "Updating Source Files"](#)
- [Section 9.4.4, "Uploading Source Files"](#)

9.4.1 Content Repository Overview

The Content Repository page lists the source files in your content repository, and allows you to preview the files. It also allows access to other pages where you can upload and update source files.

In the Content Repository page you can:

- View all source files that have been uploaded to the content repository.
- Delete source files from the content repository.
- Search for source files within the content repository.
- Access the Upload/Update Source File pages, where you can upload source files for the repository.

9.4.2 Understanding IBE: Use Database for Media Storage

The profile option, IBE: Use Database for Media Storage, should be set to **Yes** at the site level in order to enable certain functionality in the Content tab, as described below:

When set to Yes:

1. In the Add/Update Source File page, the flashlight icon (which is used to launch the LOV for content repository) is displayed.
2. In the Add/Update Source File page, the Upload File button is displayed.
3. The Content Repository tab is displayed, and you can use it to upload source files.

When set to No:

1. In the Add/Update Source File page, the flashlight icon (which is used to launch the LOV for content repository) is NOT displayed.
2. In the Add/Update Source File page, the Upload File button is NOT displayed.

3. The Content Repository tab is still displayed. But when user selects the tab, a warning message, *You do not have access to this page. To access this page, set IBE: Use Database for Media Storage to Yes.* is displayed.

9.4.3 Updating Source Files

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

Steps

1. Log in to the Site Administration UI and select Content > Content Repository. The Content Repository page appears. Search for content source files, using the percent (%) sign as a wildcard if desired.
2. In the Content Repository page, select the Update icon for the content item you wish to update. The Update Source File page appears.
3. Browse the file system for the file to replace the current file, using the Browse button. Select the file using your operating system's conventions for selecting a file.
4. Optionally, select the Secured checkbox to apply security to the attachment.
Using the Secured checkbox allows Oracle iStore to use security for attachments. Oracle iStore checks the SECURED_FLAG column in JTF_AMV_ATTACHMENTS_B table, and for secured attachments, security measures are used through jtfdownload. Unsecured attachments are loaded through jtfupload.
5. Select Apply to save the changes. The previous file is now replaced in the Content Repository with the newly uploaded one.

9.4.4 Uploading Source Files

Use the following procedure to upload files to the Content Repository.

Steps

1. Log in to the Site Administration UI and select Content > Content Repository. The Content Repository page appears. Search for content source files, using the percent (%) sign as a wildcard if desired.
2. In the Content Repository page, select the Upload Source File button. The Upload Source File page appears.

3. Browse the file system for the file to replace the current file, using the Browse button. Select the file using your operating system's conventions for selecting a file.

4. Optionally, select the Secured checkbox to apply security to the attachment.

Using the Secured checkbox allows Oracle iStore to use security for attachments. Oracle iStore checks the SECURED_FLAG column in JTF_AMV_ATTACHMENTS_B table, and for secured attachments, security measures are used through jtfdownload. Unsecured attachments are loaded through jtfload.

5. Select Upload File to save the changes. The file is now uploaded to the Content Repository, and can be mapped to media objects.

Implementing Pricing

This chapter contains information on how to implement price lists for an Oracle iStore 11*i* implementation.

Main topics in this chapter include:

- [Section 10.1, "Pricing Functionality Overview"](#)
- [Section 10.2, "Price Lists Overview"](#)
- [Section 10.3, "Pricing Qualifiers Overview"](#)
- [Section 10.4, "Pricing Modifiers Overview"](#)
- [Section 10.5, "Pricing Agreements"](#)
- [Section 10.6, "Steps to Create Price Lists"](#)

10.1 Pricing Functionality Overview

Oracle iStore displays prices for site products in both the catalog pages and the shopping cart. All item prices are retrieved from price lists; thus, every Inventory item for sale in your sites must appear on at least one price list. You can create price lists in Oracle Order Management Suite's Basic Pricing module, which is included in your purchase of Oracle iStore. Using Oracle Advanced Pricing, a separately licensable product, you can enhance the range of pricing functionality in your sites. In addition, you can use qualifiers and modifiers to alter the list price of items based on specific parameters. By setting a profile option, you can specify whether the Pricing Engine retrieves site-specific price lists or retrieves the best price from any available price list.

Oracle iStore caches prices in the catalog for site-based price lists and guest users. In the shopping cart, which retrieves prices through Oracle Order Capture, prices are not cached.

Additional topics in this section include:

- [Section 10.1.1, "Pricing Terminology"](#)
- [Section 10.1.2, "Basic Pricing Versus Advanced Pricing with Oracle iStore"](#)
- [Section 10.1.3, "Best Price and Site-Based Price List Scenarios"](#)
- [Section 10.1.4, "Other Pricing Profile Options"](#)

Note that this guide contains summarized pricing information and data specifically related to Oracle iStore. For complete pricing information, consult the following guides:

- Basic Pricing - *Oracle Order Management Suite Implementation Manual, Vol.1*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

10.1.1 Pricing Terminology

The following definitions of common pricing terms can assist your understanding of Oracle Pricing functionality.

- **Best Price** --- The best price is determined when the Pricing Engine searches through all qualifying price lists to find the best price for the customer (could either be lowest price or lowest precedence price). To use best price in Oracle iStore, set the IBE: Use Price List Associated with Specialty Site profile option to No.
- **Context** --- A data source used by Oracle Advanced Pricing to obtain attributes. For example, Oracle Advanced Pricing considers the customer order itself to be a context. Various attributes from the order, such as order date, can be used by Pricing to control the selection of a price or modifier.
- **List Price** --- The base price per unit of the item, item category, or service offered. You define the list price on a price list. All price adjustments are applied against the list price.
 - Note that through the use of the permission, IBE_VIEW_NET_PRICE, you can control whether B2B users see only List Price or also prices with discounts and net prices; see [Section C.6.0.32, "IBE_VIEW_NET_PRICE"](#), for details.
- **Modifier** --- Modifiers enable you to set up price adjustments (for example, discounts and surcharges), benefits (for example, coupons), and freight and special charges that the pricing engine applies immediately to pricing requests or accrues for later disbursement.

- **Precedence** --- Used by Oracle Pricing to resolve Incompatibility. Precedence controls the priority of modifiers and price lists. If a customer qualifies for multiple modifiers that are incompatible with each other, precedence determines the discount that the customer is eligible for based on the precedence level of the modifier. The lowest level (lowest number) precedence receives the highest priority.
- **Pricing Event** --- A point in the process flow of a Pricing Line, e.g. Order, Contract, etc. at which a call is made to the Pricing Engine to fully or partially price the order.
- **Qualifier** --- A pricing attribute which the Pricing Engine uses to determine who can receive a particular price, discount, promotion, or benefit. Qualifiers and qualifier groups can be linked to Oracle price lists and modifiers.
- **Request Type** --- Used by Oracle Advanced Pricing to identify the transaction system which calls the Pricing Engine for calculation of the price -- for example, Oracle Order Management or Oracle Order Capture.
- **Selling Price** --- Price derived after applying price adjustments to list price. In the Oracle iStore Customer UI, this can display as "Your Price" in the catalog.
- **Sourcing Rules** -- Sourcing rules are used by Oracle Pricing for binding attribute values for attributes defined in a qualifier or pricing context.

10.1.2 Basic Pricing Versus Advanced Pricing with Oracle iStore

Using Basic Pricing a price list can contain:

- Pricing formulas
- Pricing agreements
- Basic discounts
- Freight and logistic charges

Using Advanced Pricing, a price list can contain:

- Volume breaks
- Item or item hierarchy structure
- Simple or complex formulas
- Dynamically calculated prices
- Percentage, fixed and/or lump sum discounts and/or surcharges

- Customized qualifiers
- Qualifier sourcing rules
- Deals
- Promotions

10.1.3 Best Price and Site-Based Price List Scenarios

Oracle iStore retrieves price list information in one of two scenarios, depending upon the value of the profile option, IBE: Use Price list Associated with Specialty Site.

- If the profile option is set to Yes, Oracle iStore retrieves prices from the site-based price lists specified in the Site Administration UI Pricing page for three main user types: B2C, B2B, and Guest. This is also called site-based pricing. In this case, Site ID is passed to the Pricing Engine.
- If the profile option is set to No, Oracle iStore passes a null price list, with Party ID, Account ID, and Site ID to the Pricing Engine. In this case, the Pricing Engine searches through all eligible price lists to determine the "best price" for which the user qualifies.

See [Section A.8.0.85, "IBE: Use Price List Associated with Specialty Site"](#), for more information on this profile option.

Note that when using this method, prices are not cached in the catalog -- therefore performance will diminish.

The only exception to this rule is for walk-in/guest users. Regardless of the value set for IBE: Use Price List Associated with Specialty Site, for walk-in users, the default price list is always determined by the price list set in the Site Administration UI. In addition, guest users always see the cached prices.

Note: Depending on the Incompatibility Resolve Code setup in the Event Phases, the Pricing Engine uses either the lowest price or the lowest precedence (lowest number) value per item to get the best price.

10.1.4 Other Pricing Profile Options

For details on other profile options used in the pricing process, see [Section A.8, "Customer UI Pricing Profile Options"](#), and [Section A.6, "Customer UI Mandatory Setup Profile Options"](#).

10.2 Price Lists Overview

Price lists are essential to ordering products because each item entered on an order must have a price, and item prices always come from some price list. Each price list contains basic list information and one or more pricing lines, price breaks, pricing attributes, qualifiers, and secondary price lists. Basic price list information includes the price list name, effective dates, currency, pricing controls, rounding factor, and shipping defaults, such as freight terms and freight carrier.

Price lists can be tied to modifiers and qualifiers, giving you the ability to offer discounts, promotions, and deals to your customers -- or to automatically add freight charges or surcharges to an order.

You can define the following types of prices on price lists:

- **Unit price** -- A fixed price
- **Percent price** -- A price which is a percent of the price of another item
- **Formula** -- Multiple pricing entities and constant values related by arithmetic operators. For example, you define the price of an item to be a percentage price of another price list line.
- **Price break** -- If the price of an item varies with the quantity ordered, you can define bracket pricing or price breaks.

10.2.1 Multiple-Currency Price Lists

In addition to single-currency price lists, Oracle iStore supports price lists in multiple currencies. Multiple-currency price lists reduce maintenance costs if you are doing business in more than one currency, because all items in all currencies can be contained and maintained within a single source price list.

Following are some key points of multiple-currency price list support:

- When the merchant creates a price list, he specifies one *base currency* for the price list, and any number of *converted currencies*. All of the converted currencies use the base currency as their basis.
- In Oracle iStore, when a pricing request is made, the Pricing Engine converts the price on the base price list to the ordering currency and returns the new price in the ordering currency to the Customer UI.
- Oracle iStore supports catalog caching of both prices in the base currency and the other currencies on the price list.

- When a user changes the currency in the Customer UI, the catalog gets refreshed with the prices in the selected currency (known as *session currency*), and the shopping cart also is re-priced in the session currency. This scenario works both in site-based pricing as well as best pricing.
- In the Site Administration UI Search and Select: Currencies page, Oracle iStore retrieves not only base currencies, but also the convert-to currencies based on the currency conversion setup, providing multi-currency price lists are enabled.
- In the Site Administration UI Search and Select: Price Lists page, Oracle iStore retrieves all price lists which have the selected currency either as a base currency or converted-to currency, providing multi-currency price lists are enabled.

The Global Bin is used in the Customer UI to allow switching of currencies -- see [Section 6.4.1.2, "Global Bin"](#), for more information.

10.2.1.1 High-Level Steps to Set up Multi-Currency Price Lists

To set up multiple-currency price lists:

Important: Once you convert your data structure to enable multi-currency price lists, you cannot revert back to single-currency price lists.

1. Ensure that each currency you plan to use has been set up. See the *Oracle General Ledger User Guide* for more information.
2. Set the Oracle Pricing profile option, QP: Multi-Currency Installed, to Yes at the site level.
3. Run the QP concurrent program to convert existing single-currency price lists to multi-currency: Run (one time) the concurrent program, Update Price Lists with Multi-Currency Conversion Criteria. The program creates a currency conversion list for each combination of Price List currency and rounding factor, and attaches a currency conversion list to each price list and agreement. This is a mandatory step, since without this the Pricing Engine cannot use the current price lists as multi-currency price lists.

Note: You only need to run this program if you are **not** implementing a fresh install of Oracle Applications.

4. Set the profile option, QP: Multi-Currency Usage, to Yes at iStore application level.

Note: Ensure that other Oracle applications which use price lists and which you are integrating with also have the same setting for this profile option.

5. Create or update a base currency price list and attach the conversion list to it. In Oracle Pricing, set up Currency Conversion Rates (Price Lists > Multi-Currency Conversion Setup) and, optionally, currency specific markup/markdown equations.

For steps detailing how to set up price lists, see [Section 10.6, "Steps to Create Price Lists"](#).

6. After you set up price lists, you must assign price lists to specific sites using the Oracle iStore Site Administration UI. Assigning price lists is covered in [Section 5.2, "Creating Sites"](#).

Refer to the *Advanced Pricing Implementation Guide* for additional information on the pricing functionality described above.

10.3 Pricing Qualifiers Overview

Pricing qualifiers can modify an item's price based on various criteria, such as site name, item number, or quantity. Once the qualifiers are set up and associated to a price list, in most cases, the price change is automatically applied by the Pricing Engine, either in the Customer UI catalog or the shopping cart.

After you tie qualifiers to price lists, the attributes are used to pass specific data (for example, information about a customer, an item, or an order) to the Pricing Engine, and then to apply the price change. Qualifiers also can be tied to modifiers to provide List Price/Your Price discounts. In addition, pricing qualifiers can be grouped into *qualifier groups* and these groups also can be tied to price lists.

See the following sections for more information:

- [Section 10.3.1, "Pricing Qualifiers Supported by Oracle iStore"](#)
- [Section 10.3.2, "Oracle iStore Site as Pricing Qualifier"](#)

For detailed information on pricing qualifiers, see the *Oracle Advanced Pricing User Guide*.

10.3.1 Pricing Qualifiers Supported by Oracle iStore

All of the pricing qualifiers that are supported by Oracle iStore are supported at the shopping cart level -- but in the catalog pages, a only subset these supported attributes are available to the Pricing Engine.

The following table, [Table 10–1, "Oracle iStore Supported Pricing Qualifiers"](#), shows the pricing attributes supported in the Customer UI. The table also shows the

context for the attributes, whether they are supported in the catalog in addition to the shopping cart, and whether they are supported at item level (also known as line level) or cart level (also known as order or header level). Remember, all of the following are supported in the shopping cart; some are only supported in the catalog. Customer contexts are supported in a Best Price scenario only.

Table 10–1 Oracle iStore Supported Pricing Qualifiers

Context	Attribute	Catalog Support?	Supported Level(s)
Customer	Customer Name	Yes	Item and Cart levels
Customer	Customer Class	Yes	Item and Cart levels
Customer	GSA	Yes	Item and Cart levels
Customer	Account Type	Yes	Item and Cart levels
Customer	Party ID	Yes	Item and Cart levels
Customer	Sales Channel	Yes	Item and Cart levels
Customer	Agreement Name	No	Item and Cart levels
Customer	Agreement Type	No	Item and Cart levels
Customer	Bill To (site)	No	Item and Cart levels
Customer	Invoice to Party Site	No	Item and Cart levels
Customer	Ship To (site)	No	Item and Cart levels
Customer	Ship To Party Site	No	Item and Cart levels
Customer	Site Use	No	Item and Cart levels
Item	Item Number (inventory_item_id)	Yes	Item level only
Item	ALL_ITEMS (all items being priced)	Yes	Item level only
Item	Item Category (determined by inventory_item_id)	No	Item level only
Item	iStore Section	No	Item level only
Item	Segments 1-20 (key item flexfield segments)	No	Item level only
Minisite	Minisite_ID	Yes	Item and Cart level
Modifier List	Price List	Yes	Item and Cart levels
Modifier List	Promotion Number (Promo Code)	No	Item and Cart levels
Order	Line Category	No	Item level only

Table 10–1 Oracle iStore Supported Pricing Qualifiers

Context	Attribute	Catalog Support?	Supported Level(s)
Order	Line Type	No	Item level only
Order	Customer PO	No	Item and Cart levels
Order	Order Category	No	Item level only
Order	Order Type	No	Item and Cart levels
Order	Request Date	No	Item and Cart levels
Order	Pricing Date	No	Item and Cart levels
Order	Shippable Flag	No	Item and Cart levels
Pricing Attribute	Parent List Price	No	Item level only
Pricing Attribute	Model ID	Yes	Item level only
Segment	Market Segment	No	Item and Cart levels
Segment	Target Segment	No	Item and Cart levels
Terms	Shipping Terms	No	Item and Cart levels
Terms	Payment Terms	No	Item and Cart levels
Terms	Freight Terms	No	Item and Cart levels
Territory	Sales Territories	No	Item and Cart levels
Volume	Line Volume	Yes	Item level only
Volume	Line Weight	Yes	Item level only
Volume	Order Amount (sum of the list prices on all active order lines)	No	Cart level only
Volume	Item Amount	No	Item level only
Volume	Item Quantity	No	Item level only
Volume	Period1 Item Quantity	No	Item level only
Volume	Period2 Item Quantity	No	Item level only
Volume	Period3 Item Quantity	No	Item level only
Volume	Period1 Item Amount	No	Item level only
Volume	Period2 Item Amount	No	Item level only
Volume	Period3 Item Amount	No	Item level only

10.3.2 Oracle iStore Site as Pricing Qualifier

You can use an Oracle iStore site as a pricing qualifier, with the following features:

- Different sites can have different prices, discounts, or promotions for the same Inventory item, while utilizing the same price lists
- Supported in single-organization as well as multiple-organization scenarios
- Supported in both best price and site-based price list scenarios

Using site as a qualifier is supported at cart and item levels, and is supported both in the catalog and cart/checkout phases of an order.

10.3.2.1 Setting up Site as Pricing Qualifier

You set up this qualifier in pricing just as you would any other qualifier, selecting Minisite as the Context and Minisite_ID as the Attribute. Minisite_ID will be the Site ID of the site.

To enable the use of site as a pricing qualifier, you must also set the profile option, IBE: Use Site As Pricing Qualifier, to Yes, at the iStore application level. The default value is No.

10.3.2.2 Other Guidelines

1. With the exception of merged items, qualifier prices are based on the price list in the site where the item was added to the cart.
2. In a multiple-site situation, if IBE: Merge Shopping Cart Lines profile is enabled, Oracle iStore will merge the lines and apply the price of the product from the site most recently accessed. See [Section 12.1.19, "Merging Duplicate Items in Cart"](#), for more information on this profile option.
3. B2B users must have the IBE_VIEW_NET_PRICE permission in their user role in order to see discount prices. See [Section C.6.0.32, "IBE_VIEW_NET_PRICE"](#), for details on this permission.
4. If a user accesses the shopping cart from any other site except where it was created, the prices in the shopping cart will not be updated by the Pricing Engine unless the user performs some activity which causes cart to get updated/activated. See [Section 12.1.7.1, "Active Cart Activities"](#), for more information about how a cart can be updated.
5. In the case of site-published quotes that can be modified by a user, if no site name is known at item level, the site name will be populated at cart level based on the site where the quote was published.

10.3.2.3 Use Cases

The following use cases can aid your understanding of this functionality.

- [Use Case 1](#)
- [Use Case 2](#)
- [Use Case 3](#)
- [Use Case 4](#)
- [Use Case 5](#)

Use Case 1

- **Business Justification** --- Site for web specials
- **Setup** --- One operating unit (OU), one site
Discount is defined as a modifier and site name as a qualifier defined in Pricing.
- **User Flow** ---
 - User adds items to shopping cart from catalog.
 - All items use the same price list (site-based price list) except for the ones for which any pricing agreements have been applied in the shopping cart.
 - The site name is stored at the item (line) level. Item-level site name is passed to Pricing as a qualifier, and discounts will be applied as set up in Pricing.

Use Case 2

- **Business Justification** --- One price list (potentially); different discount schedules per site
- **Setup** --- Multiple OUs, one site per OU
Discount is defined as a modifier and site name as a qualifier defined in Pricing.
- **User Flow** --- Same as in Use Case 1.

Use Case 3

- **Business Justification** --- Site for specials: one regular site and one refurbished site. Refurbished site has *X* percent off. User can place items from both sites in one order. Promotion goods are applicable to selected sites. Site can be used as a

qualifier, where certain promotions are not valid in some sites (e.g., a buy-1-get-1 free promotion may be allowed in B2C site but not in B2B site).

- **Setup** --- Multiple sites per OU

Discount is defined as a modifier and site name as a qualifier defined in Pricing.

- **User Flow** ---

- User adds items to cart from Site A, which offers 10 percent off
- Site name is populated at cart (header) as well as item (line) level. Site price list is used for all lines, unless a pricing agreement is specified.
- User adds items to cart from Site B (zero percent off)
- iStore passes the item (line) level site name and Site B price list to Pricing, which results in 10 percent off on items which were from Site A and zero percent off on products from Site B.

- **Preconditions** ---

- Price lists can be same/different; all items can be on one or both price lists.
- Site A has 10 percent off, for Site B, either it didn't qualify for any discounts or there were no modifiers setup for it
- Items published are mutually exclusive to Site A and Site B.

Use Case 4

- **User Flow** ---

- User adds items X1 and X2 to cart from Site A, which offers 10 percent off.
- Site name is populated at cart (header) as well as item (line) level. Site price list is used for all lines (unless pricing agreement is specified).
- User adds X1 and Y1 to cart from Site B (offering 5 percent off) and Merge lines in shopping cart profile is set to Yes.
- Assume the price is different in both the sites for the X1. iStore will pass (via ASO) to QP: Site B minisite for the combined X1s (hence, quantity is 2).
- User will see following:
 - X1, quantity 2, Site B, price list 2, discount of 5 percent
 - X2, quantity 1, Site A, price list 2, discount of 10 percent
 - Y1, quantity 1, Site B, price list 2, discount of 5 percent

- **Preconditions** ---

- All items are on both price lists.
- Site A has 10 percent off, Site B has 5 percent off

- **Use Case 5**

- **Business Justification** --- Sites with "best pricing" options

All the above scenarios are valid. Users can add items to shopping cart; all items can have the different/same item level price list. In this case, discount will be calculated based on site from where the item was added. In this scenario, guest user will see list price in catalog, as best price is calculated after the user signs in.

10.4 Pricing Modifiers Overview

Modifiers are pricing actions that drive your pricing processes in addition to price lists, formulas, and agreements. Modifiers can adjust net price either up or down. Modifiers enable you to set up price adjustments (for example, discounts and surcharges), benefits and promotions (for example, coupons) and freight and special charges that the Pricing Engine applies immediately to pricing requests or accrues for later disbursement.

To create a price list that contains a discount, use the Discount List Modifier. This enables you to display a different price for List Price/Retail Price and Your Price in the Customer UI. These prices appear next to the product in the catalog pages. The value for List Price is from the basic price list, while the value for Your Price is the basic price list plus the associated discount list modifier. For steps detailing how to set up a discount modifier, see [Section 10.6.1, "Creating Price Lists with Discount Modifiers"](#).

Pricing modifier functionality also can be used to set up promotion codes in Oracle iStore. See [Section 12.1.12, "Using Promotion Codes in Shopping Carts"](#), and the *Oracle Order Management Suite Implementation Manual* for complete details.

Order Management Suite's Basic Pricing module includes discount list modifier functionality. Although the discount is created using basic pricing, it must contain specific attributes to function properly in Oracle iStore.

For more information, see the *Oracle Order Management Suite Implementation Manual* and the Oracle Advanced Pricing documentation.

10.4.1 Promotional Goods Modifiers

Promotional goods (PRG) modifiers allow you to automatically add buy-1-get-1-free items when users purchase another item. They also allow you to offer discount products in your sites. See the following topics for more information:

- [Section 10.4.1.1, "PRG Terminology"](#)
- [Section 10.4.1.2, "Setting up PRGs"](#)
- [Section 10.4.1.3, "PRG Rules, Guidelines, and Behavior"](#)
- [Section 10.4.1.4, "PRG Use Cases"](#)

10.4.1.1 PRG Terminology

- **Promotional Good (PRG)** --- The item that is automatically added to the cart if the qualifying item is added to the cart
- **Qualifying item(s)** --- The item that must be added to the cart in order for the PRG to be received

10.4.1.2 Setting up PRGs

In addition to the Oracle Pricing setups, the following are the steps/guidelines specific to Oracle iStore:

1. **Set Profile Option** --- The profile option, ASO: Enable Promotional Goods, can be set to enable or disable PRG support in Oracle iStore. See [Section A.8.0.87, "ASO: Enable Promotional Goods"](#).
2. **Ensure Pricing Event Phase** --- When setting up PRGs, ensure that they are in the pricing All Lines Adjustment event phase.
3. **Add PRG Information to Products or Sections** --- By default, the Oracle iStore catalog does not differentiate between promotional/qualifying goods and non-promotional/non-qualifying goods in terms of how these items display. Therefore, if you wish customers to recognize a PRG/qualifying item in the catalog, you must manually tell customers that such an item exists. One way to do this is to add the PRG/qualifying information directly into the item name or description. Another way would be to create a specific section populated with the applicable PRG/qualifying items and then label the section accordingly.

10.4.1.3 PRG Rules, Guidelines, and Behavior

The following rules, guidelines, and behavior apply to PRG functionality with Oracle iStore:

1. Display in carts --- PRGs are always the last set of line items in the cart, with a visual indicator that resembles a price tag. When a user does a mouse-over, the PRG displays its information -- for example, "Promotional item for qualifying item1, item 2". PRG items appear in saved carts, shared carts, and order review pages with the visual indicator and mouse-over information.
2. Order Tracker display --- In Order Tracker, PRG items appear as any other item.
3. Qualifying products --- Qualifying products can be an item, item category, or all items. Merchants can define a single qualifying item as an item, an item category defined in Inventory or any item added to the shopping cart.
4. Ability to get PRG by having sum of quantity of qualifying items in cart --- The customer can add qualifying items from the catalog to the cart multiple times with different quantities. The sum of the quantity of qualifying items determines if the PRG criteria are met or not. If yes, the PRG is added to the cart.
5. When are PRG items added to the cart --- If the modifier is set to be automatic in Oracle Pricing, then as soon as user adds the qualifying item to the cart, a new cart line is created for the PRG. If the modifier is set up as "ask", then only when the end user provides the promotion code is the PRG added to the cart.

To enable the Promotion Code link in the Your Shopping Cart page, set the profile option, IBE: Use Promotion Code. See [Section A.7.0.67, "IBE: Use Promotion Code"](#). Note that in addition to any required merchant setups, B2B users must have the [IBE_VIEW_NET_PRICE](#) permission in their user roles to access promotion code functionality.

6. Add/Remove promotional goods from cart as quantity of qualifying items changes --- If the quantity of the qualifying item is changed, then the PRG is added/deleted as per the definition in the Oracle Pricing modifier screen. See Scenario 4, under [Section 10.4.1.4, "PRG Use Cases"](#), below, for an example.
7. Configured items as qualifying items --- When the Pricing Engine is called from Oracle Configurator, PRGs are not returned to the cart at that time. When the configured item is a qualifying item, only when the user completes the configuration session are the configuration items added to the cart. At this time, a full pricing call is made. The PRG will not be part of the configuration, but will be a separate line.
8. Configured items as PRGs --- Users can add a qualifying item to the cart (e.g., flowers). A PRG (e.g., a birthday card) can be added to the cart, and the user can select Reconfigure to add text to the card; however, he cannot delete or add new components to the configuration. If the user adds a qualifying product,

and a configurable product is the PRG, the user can reconfigure the product and get x percent off the whole configuration.

9. Price list of PRG line --- Merchants can select the price list for the promotion good in the Define Modifier screen. The price list for the cart line is the price list set for the PRG in Oracle Pricing. The list price on the cart is the price from this price list. No issues arise with site-based pricing, nor with best pricing, as Oracle iStore always uses the price list as defined in the modifier definition.
10. Restrict changes to item information --- Customers cannot change the item, quantity, or UOM of the PRG line.
11. Pricing agreements --- Oracle iStore does not apply any pricing agreements to PRG lines. Since pricing agreements can be attached to commitments, customers cannot pay for PRGs with commitments. Oracle iStore does not show PRGs in the pricing agreements screen in the shopping cart, nor in the commitments screen from the billing page during checkout.
12. Deletion of PRG items --- Customers can delete PRG items just as with any other item in the cart. Once the user has deleted the promotion good, it will not automatically appear again. The customer must delete the qualifying line and then add the same again to retrieve the PRG item again. However, if the user deletes the PRG for a qualifying line and adds a new qualifying line, and the profile option, IBE: Merge Shopping Cart Lines, is No, then the PRG will also get added to the qualifying item.
13. Automatic removal of PRGs --- If a customer deletes the qualifying item, the PRG is automatically removed from the cart. If more than one required qualifying item exists, if the user deletes any of them, the PRG also is automatically removed from the cart.
14. Available To Promise (ATP) checks --- Customers can do ATP checks on PRG items.
15. Descriptive Flexfields (DFFs) --- PRG items can be used with DFFs.
16. Entering bill to information --- Customers can enter line-level bill to information for PRGs.
17. Returns --- Customers can search for and select items which were received as PRGs. For a referenced return, Oracle Order Management currently doesn't enforce that the PRG line must be returned with the buy line. Also, Oracle Order Management allows the return of PRG lines. Oracle iStore allows users to return qualifying items as well as PRGs, providing merchants have set up the functionality appropriately. Merchants can determine their own rules for returning PRGs and qualifying items can be returned. Users can order

qualifying as well as promotional goods and may need to return one or more items. Depending upon merchant policy of returns, there can be various scenarios. Merchant can configure the rules for returning qualifying as well as promotional goods.

18. Ability to enter line-level ship to information --- Customers cannot enter line-level ship to information for PRGs.
19. Splitting of PRG lines --- Customers cannot split a PRG line.
20. Viewing tax information --- Customers can view line-level tax information with PRGs.
21. Promotions --- Cart-level adjustments can be applied to PRGs. Item-level adjustments will be applied to PRGs only if they are defined in a pricing phase with Freeze Override flag as Yes. Currently, line-level adjustments are done as a result of deep linking.
22. Service items --- Merchant can define a service item as the qualifying good for a serviceable item, which is the PRG. However, as Oracle Pricing does not currently support it, merchants cannot offer services items as the PRG in an order.
23. Shopping lists --- PRG items cannot be copied to shopping lists.
24. Express Checkout --- If a user does an Express Checkout for a qualifying item, the related PRG will also get ordered and will be visible on the Express Checkout pending orders page.
25. Merging items --- The profile option, IBE: Merge Shopping Cart Lines, is ignored for PRG items. PRG lines are read-only and can have prices different from normal lines -- therefore, PRG lines and non-PRG lines items for the same item are not merged.
26. Validate PRG quantity in cart as set up in PRG modifier --- Customers can add qualifying items to a cart. Based on the setup in Oracle Pricing for the PRG (either for point or range) the correct quantity for promotion good will be shown in the cart. The same check needs occurs when the items in the cart get merged. Merchants can set up the PRG modifier in Oracle Pricing in two ways:
 - Point: Irrespective of quantity of qualifying item, always give x quantity of PRG.
 - Range: Depending on quantity of the qualifying item, give y quantity of PRG.

For example: If a user buys item A, he will get 2 of PRG item B. If the user buys 2 of item A, he will get 4 of PRG item B.

27. Restrict PRGs by sites --- Merchants can set up some promotions to not apply in some sites. Site as a pricing qualifier can be used in this scenario.
28. Expired modifiers --- PRGs are deleted from the cart if the modifier is expired. If a user adds a qualifying item to the shopping cart and a PRG also is added, but later the user updates the cart and the PRG is no longer active, the PRG is deleted from the cart.
29. Currency re-pricing --- On a change of currency, PRG items also are re-priced in the new currency. For example, a user adds items to a cart with a session currency of USD. When the user changes the currency to Euro, all items in the cart (including PRGs) will be re-priced in the new currency.
30. Navigation to catalog --- PRG items expose a hyperlink that allows the user to navigate to the catalog.

10.4.1.4 PRG Use Cases

- **Scenario 1: Buy one computer, receive one free mouse:**

If the customer adds a computer to the cart, as soon as the Pricing Engine is called, a new line is created for the free mouse item. The user should not be able to change the item, quantity, or UOM of the PRG.

The price list for the line should be the price list set for the PRG in Oracle Pricing. The list price on the cart should be the price from this price list.

The user should be able to delete the PRG.

Any freight charges for the PRG should be returned by pricing and added to the cart.

If the user deletes the computer, the mouse should automatically be removed from the cart.

- **Scenario 2: Buy one computer and one keyboard and receive one free monitor:**

All requirements from Scenario 1 are valid for this scenario. In addition, if the user deletes either the computer or the keyboard, the monitor should be automatically removed from the cart.

- **Scenario 3: Buy a telephone and one year of phone service and receive one free cell phone:**

All requirements from Scenario 1 are valid for this scenario. Currently, the Pricing Engine doesn't support attaching services to PRGs, and Oracle iStore currently only allows users to buy services for a serviceable item with a reference to an existing order line. Hence, merchants can implement this functionality as, "Buy 1 computer and 1 year extended warranty" and get a printer for a 50 percent discount. In this case, the computer and extended the warranty together are the qualifying items.

Note that Oracle iStore must have the quantity of the qualifying item and promotion item the same.

- **Scenario 4: Add/Remove promotional goods from cart as quantity of qualifying items changes:**

For example, if the merchant has set up the following:

Qualifying item: Computer (Quantity: 2)

PRG item: Printer (Quantity: 1)

Steps:

- a. The user adds one computer to the shopping cart.
- b. The user increases the quantity of computers to two. Printer gets added to cart.
- c. User decreases the quantity of computers to one. Printer gets deleted from the cart.
- d. User increases the quantity of computers to two. Printer gets added to cart.

10.5 Pricing Agreements

Pricing agreements define the price list of the items in the cart and provide mechanisms to derive discounts. Agreements can be universal or customer-specific -- however, Oracle iStore does not support universal agreements unless previously added to a quote through an integration with Oracle Quoting.

When a pricing agreement is retrieved in the Customer UI, only the price list attribute is passed in with the agreement. In addition, agreements will only display which are in the customer's session currency and Account ID.

10.5.0.5 Other Guidelines

- Each pricing agreement can only have one price list assigned to it. However, one price list can be linked to multiple agreements.

- Oracle iStore supports two types of agreements:
 - **Standard Agreements** --- Standard Agreements use standard price lists. Price list lines are set up and maintained through the Price List Setup form. Use Standard Agreements to define special terms and conditions that are defaulted onto the order, but that use prices available to other orders. Standard Agreements can be generic or can be specific to a customer or customer group.
 - **Pricing Agreements** --- Pricing Agreements use Agreement Price Lists. These price lists are set up and maintained through the Agreements form. Use Pricing Agreements to set up special pricing arrangements with either a customer or a group of customers. This type of agreement also supports special terms and conditions that are defaulted onto the order.
- B2B users must have the [IBE_USE_PRICING_AGREEMENT](#) permission to use agreements.

For more information see the *Oracle Order Management Suite Implementation Manual Volume 1 and Volume 2*.

For information on how agreements display in the shopping carts, see [Section 12.1.11, "Using Pricing Agreements in Shopping Carts"](#).

10.5.1 Item-Level Agreements

B2B customers can select pricing agreements in a shopping cart at item level. To enable item-level agreements for B2B users, set the profile option, IBE: Use Line Agreements, to Yes at iStore application level.

If a B2B user is assigned the permission, [IBE_USE_PRICING_AGREEMENT](#), and the profile option, IBE: Use Line Agreements, is set to Yes, the user can set cart and item-level agreements.

Note that service items and promotional items are not candidates for item-level agreements.

If a pricing agreement is assigned at the item level, the price will be retrieved by the corresponding price list. Otherwise, Oracle iStore will use the price list associated to the pricing agreement assigned at the cart level.

10.5.2 Commitments

In a B2B scenario, users can use commitments to complete the billing process. To enable commitments in your sites, set the profile option, IBE: Use Commitments, to Yes at the iStore application level.

Commitments can be associated with an agreement. Thus, the agreement and corresponding price list can get pulled for the line, even if users do not have permission and the agreement profile is turned off. If those are off, then users will not be able to set agreements on the commitment page, but the agreements tied to commitments will still be pulled in, and so will the corresponding price list.

10.6 Steps to Create Price Lists

This section contains quick steps for creating price lists. See the pricing documentation listed in this section's Reference area for complete information.

Prerequisites

- Required currencies and languages are installed. See [Section 2.7, "Setting up Oracle General Ledger"](#).

Steps

1. Log in to Oracle Forms as Order Management Super User or Oracle Pricing Manager.
2. Navigate to: Price Lists > Price List setup.
3. In the Price List form enter the following:
 - Price List Name --- Use a name that reflects the site implementation. For example, VISION_US_PL.
 - Description --- Include a short description of the price list. For example, Euro price list for VISION_US implementation.
 - Currency --- Choose a default currency. For example, choose DOL for the VISION_US_PL.
4. Navigate to the List Lines tab and add products to the price list.
5. Enter Items in the Product Context field.
6. Enter Prices in the Value field.
7. Save your work.

Remember, if you are using different price lists for different sites, you should ensure that all items are listed on all price lists being used across your instance. Pricing errors will occur if a user places an item in a cart in one site, navigates to another site, and attempts to check out with an item which is not on the price list of the site where he is checking out.

Reference

- Basic Pricing - *Oracle Order Management Suite Implementation Manual, Vol.1*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

10.6.1 Creating Price Lists with Discount Modifiers

This section contains quick steps for creating price lists with discount modifiers. See the pricing documentation listed in this section's Reference area for complete information.

Prerequisites

- Required currencies and languages are installed. See [Section 2.7, "Setting up Oracle General Ledger"](#), and [Section 17.3.2, "Install Languages and Currencies"](#).
- Price list for discounts must contain:
 - Product Attribute value - **ALL_ITEMS**
 - Default currency reflecting the currency of site implemented

Steps

1. Log in to Forms with Oracle Pricing Manager or Order Management Super User responsibility.
2. Choose Modifiers > Modifier Setup. The Define Modifier Form opens.
3. In the Main tab, enter the following fields:
 - In the **Type** field, enter `Discount List`.
 - In the **Name** field, enter a user-friendly name.
 - In the **Currency** field, choose a default currency for the modifier.
 - Check **Active** and **Automatic**.
4. In the **Modifiers Summary** tab, enter the following values:
 - In the **Level** field, choose `Line`.

- In the **Modifier Type** field, choose `Discount`.
 - In the **Start Date** field, pick the start date that applies.
 - Check **Automatic**.
 - In the **Pricing Phase** field, choose `List Line Adjustment`.
 - In the **Product Attribute** field, choose `ALL_ITEMS`.
 - In the **Volume** type field, choose `Item Amount`.
 - In the **Break Type** field, choose `Point`.
 - In the **Operator** field, choose `Between`.
 - In the **UOM** field, choose `Ea`.
5. In the Discounts/Charges tab, enter the following values:
- In the **Formula** field, choose `Handling`.
 - In the **Application Method** field, choose `Percent`.
 - In the **Value** field, enter your discount percentage amount.
For example, enter `10`.
6. Click Save.
7. After creating the pricing modifier, to generate and display the correct prices, run the pricing concurrent program, Build Sourcing Rules. Bounce the Apache server after the concurrent program completes.
8. After running the Build Sourcing Rules concurrent program, the price list is available in the Site Administration UI. Associate the discounted price list to a site. For steps, see [Section 5.2.4, "Create a Site: Assigning Price Lists"](#).

Reference

- Basic Pricing - *Oracle Order Management Suite Implementation Manual, Vol.1*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

Implementing Payment Types and Shipping Methods

This chapter contains information on how to implement payment types and shipping methods in Oracle iStore 11i.

Main topics in this chapter include:

- [Section 11.1, "Oracle iStore Payment Types Overview"](#)
- [Section 11.2, "Payment Types Business Flows"](#)
- [Section 11.3, "Setting up Payment Types"](#)
- [Section 11.4, "Using Payment Types Threshold"](#)
- [Section 11.5, "Setting up Item-Level Billing"](#)
- [Section 11.6, "Setting up Payment Commitments"](#)
- [Section 11.7, "Setting up Shipping Functionality"](#)

Note: You can mandate that B2B users enter billing and shipping information in the checkout pages by setting the profile option, [Section A.7.0.40, "IBE: Mandate Contacts For Billing and Shipping"](#).

11.1 Oracle iStore Payment Types Overview

Oracle iStore allows you to configure several payment types for your sites. Each site can use different payment types. Oracle Order Management, Oracle Receivables, and the Oracle iStore Site Administration UI work together to enable seeded payment types including:

- CASH - Cash

- CHECK - Check
- CREDIT_CARD - Credit Card

The seeded values for payment types are retrieved from the FND_LOOKUP_VALUES table for IBE_PAYMENT_TYPE.

Other seeded values (technically not payment types but available by default) include:

- FAX_CC - Fax Credit Card
- INVOICE - Invoice
- PO - Purchase Order

11.1.1 Credit Card Processing

Oracle iStore can be configured to handle credit card payments. Oracle Order Management, Oracle Receivables, and the Oracle iStore work together to enable credit card processing.

The seeded values for credit card payment types are pulled in from the FND_LOOKUP_VALUES table for CREDIT_CARD.

The seeded values are:

- AMEX - American Express
- DINERS - Diner's Club
- DISCOVER - Discover
- MC - Master Card
- OTHERS - Others
- VISA - Visa

See also:

- [Section 11.2, "Payment Types Business Flows"](#)
- [Section 11.3.2, "Setting up Credit Card Payment Types"](#)

11.1.2 Adding Additional Values to Payment Type Lookups

To add additional values to either of the payment type lookups (IBE_PAYMENT_TYPE or CREDIT_CARD), log into Oracle Forms with Application Developer

responsibility and modify the lookups. See the *Oracle Applications System Administrator's Guide* for complete steps.

11.2 Payment Types Business Flows

This section contains business flows for payment types:

- [Section 11.2.1, "Non-Credit Card Business Flow"](#)
- [Section 11.2.2, "Credit Card Business Flow"](#)

11.2.1 Non-Credit Card Business Flow

The non-credit card business flow is:

1. Customer chooses a non-credit card payment type as payment method.
2. Checkout process is finalized and the order is placed through Oracle iStore.
3. Order information is passed to Oracle Order Management via Oracle Order Capture.
4. Oracle Order Management picks, ships, and delivers the order.
5. After shipment, Oracle Receivables handles payment remittance for applicable payment types.

11.2.2 Credit Card Business Flow

Credit card business flow is:

1. Customer chooses a credit card payment type as payment method.
2. Checkout process is finalized, and the order is placed through Oracle iStore.
3. Oracle Order Capture passes order information to Oracle Order Management.
4. Oracle Order Management can interface with Oracle iPayment or other applications for credit card processing.

Oracle iPayment integrates with third-party payment providers to authorize the credit card, and passes transaction results back to Oracle Order Management. See the *Oracle iPayment Implementation Guide* for additional information.

5. If approved, Oracle Order Management picks, ships, and delivers the order. See the *Oracle Order Management Suite Implementation Manual* for additional information.

6. After shipment, Oracle Receivables processes payment remittance. See Oracle Receivables documentation for more information.

11.3 Setting up Payment Types

See the following to set up either non-credit card or credit card payment types:

- [Section 11.3.1, "Setting up Non-Credit Card Payment Types"](#)
- [Section 11.3.2, "Setting up Credit Card Payment Types"](#)

11.3.1 Setting up Non-Credit Card Payment Types

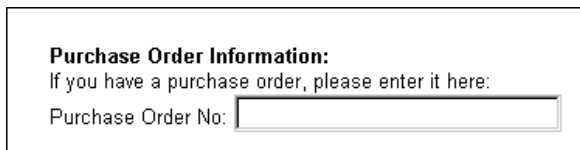
To set up non-credit card payment types in Oracle iStore:

1. Perform the required payment types setups listed in the *Oracle Receivables User Guide*.
2. Enable the payment types in the Site Administration UI. See [Section 5.2.5, "Create a Site: Assigning Payment Types"](#).
3. If enabling Purchase Order, for each applicable site, activate the Ask for Purchase Order checkbox in the Update Site: Payments page. This will allow the appearance of the Purchase Order textbox in the Customer UI's Payment and Billing Information page.

Note: Purchase order functionality cannot be used with item-level billing. See [Section 11.5, "Setting up Item-Level Billing"](#), for more information.

The following figure, [Figure 11–1, "Purchase Order Number Textbox"](#), shows how the Purchase Order textbox.

Figure 11–1 Purchase Order Number Textbox



Purchase Order Information:
If you have a purchase order, please enter it here:
Purchase Order No:

11.3.2 Setting up Credit Card Payment Types

To set up credit cards as payment types:

1. Perform the required credit card payment types setups listed in the *Oracle Receivables User Guide*.
2. Enable the credit cards as payment types in the Site Administration UI. See [Section 5.2.5, "Create a Site: Assigning Payment Types"](#).
3. Set the profile option, ASO: Credit Card Authorization, to Yes. See [Section A.6.0.9, "ASO: Credit Card Authorization"](#).

11.4 Using Payment Types Threshold

This section discusses Oracle iStore's Payment Types Threshold feature. Topics include:

- [Section 11.4.1, "Payment Types Threshold Overview"](#)
- [Section 11.4.2, "Tables Involved in Payment Types Threshold"](#)
- [Section 11.4.3, "Enabling Payment Thresholds"](#)

11.4.1 Payment Types Threshold Overview

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

From a functional perspective, the Oracle iStore payment detail page displays the appropriate payment types assigned to the payment method threshold. For example, if it is designated that all orders under \$2000 must be paid with a credit card, when the customer proceeds to checkout, **credit card** is the only payment method available to them.

This feature has the following functionality:

- In a multiple-site deployment, some sites can have the Payment Threshold feature enabled, while other sites do not.
- Payment Threshold can be enabled for each installed currency.

- For purchases below the payment threshold, customers will only see appropriate payment types for which their order qualifies.
- You can exclude a B2B customer, or group of B2B customers, from the threshold restriction, by assigning a user the permission, [IBE_IGNORE_THRESHOLD](#). For more information on user permissions in Oracle iStore, see [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#).

11.4.2 Tables Involved in Payment Types Threshold

From a technical standpoint, payment method threshold affects three tables in the database. The following table, [Table 11–1, "Payment Method Threshold - Database Tables"](#), shows the data.

Table 11–1 Payment Method Threshold - Database Tables

Table Name	Field Name Affecting Threshold	Comments
IBE_MSITES_B	PAYMENT_THRESHOLD_ENABLE_FLAG	Indicates if the payment threshold is enabled or not. "Y" is if it is enabled.
IBE_MSITE_CURRENCIES	PAYMENT_THRESHOLD	Holds the payment threshold value for the currency.
IBE_MSITE_INFORMATION	MSITE_INFORMATION2	Used to save the flag which indicates if this payment type can be used below the payment threshold. "Y" indicates that it can be used below the threshold.

11.4.3 Enabling Payment Thresholds

To enable a Payment Threshold, follow the step below:

Prerequisite

When Express Checkout is enabled, the only payment type available to a customer using Express Checkout is credit card. Therefore, if you have set up a site to mandate that credit cards are **not** a valid payment type for purchases below the threshold amount, you should disable Express Checkout. Remember, B2B users assigned the permission, [IBE_IGNORE_THRESHOLD](#), will not be affected by the threshold. See [Section 12.4.8, "Express Checkout"](#), for more information on Express Checkout.

Steps

1. Log into the Site Administration UI. The Sites page displays, showing a list of all sites in your organization's implementation.
2. In the Sites page, select the radio button of the site you wish to modify.
3. Select the Update button. The Update Site: Details page appears.
4. In the Update Site page, ensure that the Enable Threshold for Payment Types checkbox is active.
5. Navigate to the Pricing page by selecting the Pricing hyperlink. The Pricing page shows all currencies, price lists, and payment thresholds associated with a site. 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).
6. Navigate to the Payment Types page by selecting the Payment hyperlink: In the Update Site page, select the Payment hyperlink. The Payment Types page will display all payment types currently supported by the site. 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.

11.5 Setting up Item-Level Billing

B2B customers can select bill-to contacts and addresses at item level during checkout.

Note: Item-level billing is supported only with the payment types, Cash and Invoice. These two types are supported only when a purchase order is not specified. An error will occur if users attempt to use purchase orders with item-level billing.

Enable item-level billing by setting the profile option, ASO: Enable Line Level Billing, to Yes. See [Section A.14.0.117, "ASO: Enable Line Level Billing"](#).

11.6 Setting up Payment Commitments

A commitment is a contractual guarantee with a customer for future purchases, usually with deposits or prepayments. In Oracle iStore, B2B users select commitments during checkout. A merchant then creates invoices against the

commitment to absorb the deposit or prepayment. Customers can use commitments for item-level products with any cart-level payment method.

To set up Payment Commitments:

- Define Commitments -- See [Section 11.6.1, "Define Commitment"](#).
- Enable Commitments -- See [Section 11.6.2, "Enable Commitment"](#).

11.6.1 Define Commitment

Commitments are defined with deposits or guarantees. See the *Oracle Receivables User's Guide* for information on how to set up commitments.

11.6.2 Enable Commitment

To enable commitments:

1. Set the following profile option at the application level for Oracle iStore.
 - IBE: Use Commitments = Yes. If set to No, commitments are not available.

The profile option defaults to No if not set.

2. Set the profile Sequential Numbering to `Not Used` at the Oracle iStore application level. If you are using Sequential Numbering with Oracle Receivables and still want to use commitments, you can keep the Sequential Numbering turned on at the site level and still enable commitments at the application level.

11.7 Setting up Shipping Functionality

Shipping methods, also known as freight carriers, are defined in Oracle Forms, using any responsibility that contains the Shipping setup menus -- these responsibilities may include Inventory, Order Management Superuser, or Purchasing.

This section contains:

- [Section 11.7.1, "Setting up Web-Enabled Shipping Methods"](#)
- [Section 11.7.2, "Assigning Freight Carriers to Default Inventory Organization"](#)
- [Section 11.7.3, "Setting up Shipping by Site"](#)
- [Section 11.7.4, "Setting Preferred Shipping Method"](#)

- [Section 11.7.5, "Allowing Item Level Shipping Methods"](#)
- [Section 11.7.6, "Allowing Users to Enter Shipping Information"](#)

11.7.1 Setting up Web-Enabled Shipping Methods

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

Note: All shipping methods set up in Oracle Forms will display in the Site Administration UI. But only those shipping methods set as **web-enabled** and assigned to the correct item validation (inventory) organization for the user's operating unit will be available to customers in the Customer UI.

To set up shipping methods as web-enabled, log into Oracle Order Management, and, in the Carriers form, select **Web Enable** for each carrier you have set up. See "Defining Freight Carrier Ship Methods" in the "Oracle Shipping Execution" chapter of the *Oracle Order Management Suite Implementation Manual* for more information.

11.7.2 Assigning Freight Carriers to Default Inventory Organization

In addition to setting up shipping methods as web enabled (see [Section 11.7.1, "Setting up Web-Enabled Shipping Methods"](#)), freight carriers (shipping methods) must be enabled for the item validation (inventory) organization that is tied to the operating unit linked to the customer responsibility being used in the Customer UI. The customer's operating unit is defined in the MO: Operating Unit profile option at the responsibility level.

You may use the following steps:

Steps

1. Log into Oracle Forms and select Inventory responsibility
2. Navigate to Setup > Freight Carriers.
3. Query the applicable freight carrier.
4. Under the Services tab, select the Organization Assignments button.
5. Activate the Assigned checkbox for the item validation (inventory) organization that is specified for the appropriate customer responsibility.
6. Repeat for each freight carrier.
7. Save your changes.

Note: To quickly find the correct inventory organization per operating unit, log into Oracle Forms as Order Management Superuser and navigate to the Setup > Parameters form. The organization shown in the first field of the Parameters form is the correct item validation (inventory) organization to which you should assign the shipping methods.

11.7.3 Setting up Shipping by Site

You must specify the available shipping methods for each site. All shipping method lookups display to the site manager in the iStore Administration UI. However, at checkout, the Customer UI only allows customers to choose shipping methods that are:

1. Enabled for the site in which the user is shopping - see [Section 5.2.6, "Create a Site: Assigning Shipping Methods"](#), for directions on how to select shipping methods for a site.
2. Enabled for the inventory organization that is the item validation organization of the user's operating unit - see [Section 11.7.2, "Assigning Freight Carriers to Default Inventory Organization"](#).
3. Flagged as web-enabled - see [Section 11.7.1, "Setting up Web-Enabled Shipping Methods"](#).

11.7.4 Setting Preferred Shipping Method

If you wish to enable a single, preferred shipping method to display in the checkout pages, set the profile option, IBE: Preferred Shipping Method. See [Section A.7.0.47, "IBE: Preferred Shipping Method"](#).

11.7.5 Allowing Item Level Shipping Methods

You can allow users to enter different shipping methods at the item level by setting the profile option, IBE: Use Line Level Shipping, to Yes. See [Section A.7.0.64, "IBE: Use Line Level Shipping"](#).

Note that promotional goods, service items, and configurable items cannot be split with item-level shipping.

11.7.6 Allowing Users to Enter Shipping Information

You can allow customers to enter shipping information during checkout, by setting the profile option, IBE: Use Shipping Instructions, to Yes. See [Section A.7.0.74, "IBE: Use Shipping Instructions"](#).

Implementing Carts and Orders

This chapter contains information on implementing and configuring Oracle iStore 11i shopping carts and lists, order placement, order tracking, returns, and customer contact information functionality.

Main topics in this chapter include:

- [Section 12.1, "Shopping Carts"](#)
- [Section 12.2, "Direct Item Entry"](#)
- [Section 12.3, "Shopping Cart Sharing"](#)
- [Section 12.4, "Checkout and Order Placement"](#)
- [Section 12.5, "Orders Business Flow"](#)
- [Section 12.6, "Order Tracking"](#)
- [Section 12.7, "Order Cancellation"](#)
- [Section 12.8, "Order Returns"](#)
- [Section 12.9, "Oracle iStore and Party/Account Merge"](#)

12.1 Shopping Carts

Customer UI shopping carts enable customers to store products for purchase and then ultimately to purchase the items using the carts. The ability to create and save shopping carts is automatically enabled in your specialty sites. Several other cart features are controlled by profile options whose setups are discussed in this chapter.

Topics in this section include:

- [Section 12.1.1, "Shopping Carts Overview"](#)

- [Section 12.1.2, "Shopping Cart Types and Characteristics"](#)
- [Section 12.1.3, "Using Shopping Carts"](#)
- [Section 12.1.4, "Active/Saved Carts Process Flow"](#)
- [Section 12.1.5, "Accessing Cart Lists in the My Carts Page"](#)
- [Section 12.1.6, "Accessing Saved Carts"](#)
- [Section 12.1.7, "Working with the Active Cart"](#)
- [Section 12.1.8, "System-Saved and Default-Named Shopping Carts"](#)
- [Section 12.1.9, "Automatic Re-pricing of Cart Items"](#)
- [Section 12.1.10, "Using Additional Information \(DFFs\) in Shopping Carts"](#)
- [Section 12.1.11, "Using Pricing Agreements in Shopping Carts"](#)
- [Section 12.1.12, "Using Promotion Codes in Shopping Carts"](#)
- [Section 12.1.13, "Using Attachments in Shopping Carts"](#)
- [Section 12.1.14, "Checking Item Availability in Shopping Carts"](#)
- [Section 12.1.15, "Shopping Lists"](#)
- [Section 12.1.16, "Shopping Cart Security"](#)
- [Section 12.1.17, "Tax Display in Shopping Carts"](#)
- [Section 12.1.18, "Shopping Cart Expiration Values"](#)
- [Section 12.1.19, "Merging Duplicate Items in Cart"](#)
- [Section 12.1.20, "Decimal Quantities for Cart Items"](#)

Please refer to the following topics for additional information:

- **Cart Sharing** --- Cart sharing is enabled by setting a profile option. See [Section 12.3, "Shopping Cart Sharing"](#).
- **Configured Items** --- Configured items require integration with Oracle Configurator. See [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#).
- **Bills of Material** --- Information about product model bundles can be found in [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#).
- **E-mail Notification Events** --- Information about e-mail notification events related to shopping carts can be found in [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#).

- **Cart Display Templates** --- Information about the Display Templates that control the flow and appearance of the shopping cart pages can be found in [Chapter 8, "Implementing the Catalog"](#), and [Appendix E, "Display Templates and Media Objects"](#). Advanced display topics, including limited customizing information, can be found in [Appendix D, "Advanced Display"](#).

12.1.1 Shopping Carts Overview

For both B2B and B2C users, Oracle iStore shopping carts are characterized by the following:

- Users can add items to the active cart at any time.
- Users can maintain any number of carts.
- Users can save carts for retrieval up until the expiration date, which is specified in a profile option discussed in [Section 12.1.18, "Shopping Cart Expiration Values"](#).
- Under various conditions, the system saves carts for users. This functionality is described in [Section 12.1.8, "System-Saved and Default-Named Shopping Carts"](#).
- A full Cart menu enables self-service management of carts.
- The shared cart feature allows users to participate in collaborative shopping and purchasing. This feature can be turned on or off by setting a profile option. Oracle iStore can send e-mail messages to users involved in sharing carts.
- Carts can be saved as shopping lists and then re-utilized as carts; this functionality is controlled by a profile option.
- If integrating with Oracle Quoting, sales-representative-assisted carts become quotes that can be altered by sales representatives. These quotes appear in the My Quotes Page for the user. Quotes created in Oracle Quoting can also be published to the iStore customer. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for details.
- Published quotes can be shared with other users. See [Section 12.3.9, "Quote Sharing"](#), for details.
- As with all Customer UI pages, the pages that display shopping cart functionality use seeded Display Templates, allowing a wide range of display possibilities. A complete list of Display Templates is contained in [Appendix E, "Display Templates and Media Objects"](#). For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#). Information on

configuring shopping cart bins can be found in [Appendix D, "Advanced Display"](#).

- Note that cart versioning does not occur in Oracle iStore.
- You can utilize several B2B user role permissions to control access to specific functionality -- see [Section 13.7.4.1, "Summary of B2B Permissions"](#).

12.1.2 Shopping Cart Types and Characteristics

In Oracle iStore, shopping carts are categorized as follows:

- **Active Shopping Carts** --- In a user session in the Customer UI, an active cart is the cart currently being updated by the user. See [Section 12.1.7, "Working with the Active Cart"](#), for more information.
- **Saved Shopping Carts** --- A saved cart is a cart which has been saved for later use. See [Section 12.1.4, "Active/Saved Carts Process Flow"](#), [Section 12.1.6, "Accessing Saved Carts"](#), and [Section 12.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.
- **Quotes** --- Quotes are either sales representative-published quotes or carts for which users have requested sales assistance. Quotes can be shared. This functionality requires integration with Oracle Quoting. See [Section 12.3.9, "Quote Sharing"](#), [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), and [Section 12.4.4, "Requesting Sales Assistance During Checkout"](#), for more information.
- **Shared Shopping Carts** -- A shared cart is a shopping cart shared with other users. See [Section 12.3, "Shopping Cart Sharing"](#), for more information.

12.1.3 Using Shopping Carts

The Cart menu in the Customer UI allows users to manage their shopping carts. Users select the Cart icon in the Customer UI screen to access this menu. The following subtabs are available within the Cart menu:

- **Shopping Cart** --- This page always shows the user's active cart. See [Section 12.1.7, "Working with the Active Cart"](#), for more information.
- **My Shopping Lists** --- This page contains a user's saved shopping lists, if this functionality is enabled. See [Section 12.1.15, "Shopping Lists"](#), for details.
- **My Carts** --- This summary page lists all of a user's shopping carts, including shared carts. See [Section 12.1.5, "Accessing Cart Lists in the My Carts Page"](#), for more details.

- **My Quotes** --- This summary page lists all of a user's quotes, including shared quotes, if Oracle Quoting integration has been implemented. See:
 - [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#)
 - [Section 12.3.9, "Quote Sharing"](#)
- **Direct Item Entry** --- This page allows users to quickly add items to a shopping cart through the use of Oracle iStore's Direct Item Entry functionality. This functionality is only available to B2B users. See [Section 12.2, "Direct Item Entry"](#).

12.1.4 Active/Saved Carts Process Flow

The following is a high-level process flow for active and saved shopping carts in Oracle iStore's Customer UI pages.

Note: Carts must be active to be modified by the user. To add an item to an active cart, the user can be a guest or a signed-in user. The user will be required to sign in when he attempts to save the cart.

1. A user enters a specialty site and adds one or more items to the shopping cart by selecting the Add to Cart button. When the user selects the Add to Cart button, if the user already has an active cart (whether an unsaved cart or a saved cart), Oracle iStore will add the items to the *existing* active cart.
2. The active cart appears within the Shopping Cart subtab in the Cart menu, with the page title, Your Shopping Cart.
 - **Special scenario with logged-out user having an active shared cart/quote:** If a logged-out user has a *shared* cart or quote as his active cart --- and then signs-in and presses Add to Cart --- Oracle iStore places the shared cart/shared quote into a de-active, saved state, and at the same time, adds the items to the active cart, making the guest cart the active cart. This scenario can occur if the user had been logged in, was viewing the active shared cart/shared quote, and then logged out. The user can retrieve the de-activated cart in the My Carts or My Quotes pages.
3. The user can press the Save Cart button in the Your Shopping Cart page to save the active cart. This de-activates the cart. The user can then create a new active cart and access the saved cart at a later time.

In addition, please note the following:

- The user can verify that the cart has been saved by viewing the cart name at the top of the cart.

- A shopping cart can be saved at any time, until the order is placed with the cart. After order placement, the cart will no longer be available to the user, whether he has saved it or not.
 - The user does not need to save the cart to place an order with it.
4. If the user attempts to save the cart and the cart does not yet have a user-defined name (it may already have a system-saved name), after selecting the Save Cart button, the user is given the following choices in the Save Cart page:
 - a. **Create a new saved cart** --- To create a new cart, the user selects the Cart Name radio button. The user must then enter a name for the cart. The name does not have to be unique.
 - b. **Add items to an existing cart** -- This option is only available if the user has at least one saved cart. To add items to an existing cart, the user selects the Add to Existing Cart radio button and selects an existing saved cart from the existing carts drop-list. If this option is chosen, all items added to the cart inherit cart-level information of the target cart.

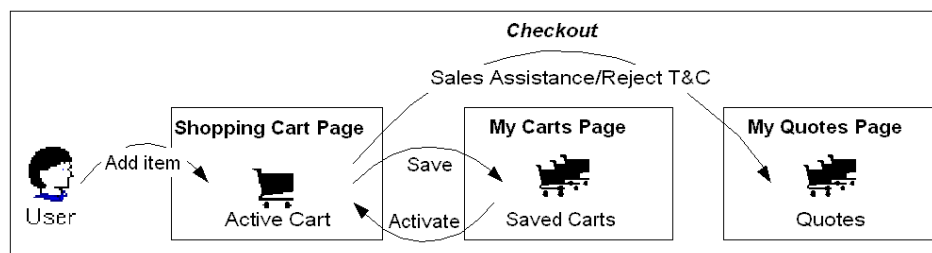
If the cart already has been saved/named by the user, then the cart is simply re-saved when the user presses the Save Cart button. Pressing the Save Cart button de-activates the cart, and a new, active cart becomes available.

5. To complete the save process, the user selects the Apply button, and a confirmation message is displayed.

The expiration date for the cart is set to the value determined by the cart expiration profile value. The expiration date can be seen by the user in the My Carts and Your Shopping Cart pages. See [Section 12.1.18, "Shopping Cart Expiration Values"](#), for more information.

6. The user can access the saved cart at any time. See [Section 12.1.6, "Accessing Saved Carts"](#). The user must log in to access a saved cart.

The following diagram, [Figure 12–1, "Active/Saved Cart Process Flow"](#), shows the active/saved cart process.

Figure 12–1 Active/Saved Cart Process Flow

Note that the above flow does not cover the quote updates. See [Section F.9, "Update Quote Process Flow"](#), for this flow.

12.1.5 Accessing Cart Lists in the My Carts Page

To view a list of saved or shared carts, both B2B and B2C registered users select the Cart icon in the Customer UI, and then select the My Carts subtab. In the My Carts page, carts are organized by type, with the most recently created cart appearing first in its section. Shopping cart expiration dates also display. Cart names are hyperlinks which lead to the details page for the cart.

See also: [Section 12.1.7, "Working with the Active Cart"](#)

The main sections on the My Carts page are:

- **Saved Carts** --- This section contains a customer's saved carts. Both B2C and B2B users will see this section.
- **Shared Carts** --- If the merchant has implemented this functionality, the Shared Carts section shows a user's shared carts, separated by type (note that the Shared Carts section is different for B2C and B2B users):
 - **Carts Shared By You** --- This section lists carts the customer is currently sharing with other users. Both B2C and B2B users will see this section.
 - **Carts Shared With You** --- A section with this label exists only for B2B customers. It lists carts that another user is sharing with the user. In this section, users will also see carts they have re-shared. For example, if User A shares with User B and User B shares with User C --- For User B, the cart will still show Carts Shared With You, even though he has re-shared the cart.
 - **Cart Retrieval Textbox** --- Instead of a Carts Shared With You section, B2C users will see a cart retrieval textbox. By entering in the box the unique cart

retrieval number, B2C users can retrieve a shared cart. See [Section 12.3.6, "Retrieving Shared Carts"](#), for more information. For B2B backward compatibility options relating to Sharee Number of previous releases, see [Section 12.3.10, "Implementing Shared Carts"](#).

12.1.5.1 Additional My Carts Page Behavior


Following are some additional points regarding My Carts page behavior.

- Quotes never appear on this page -- quotes always appear on the My Quotes Page.
- If the user's active cart is a saved or shared cart, then the cart will have a graphic icon (star) next to it, to visually represent the cart. You can see an example of this icon in the My Carts page figures on the following pages. All saved or shared carts show up on this page.
- Once an order is placed with a cart (whether active, saved, or shared) it no longer appears here.
- If a cart owner stops sharing a cart, it disappears from the list of shared carts on this page. It will then show up under saved carts.
- If a recipient removes access to a shared cart, the shared cart disappears from the recipient's lists of carts.

The following figure, [Figure 12-2, "My Carts Page - B2B Users"](#), shows a typical My Carts page for B2B users.


Figure 12–2 My Carts Page - B2B Users

My Carts

 Indicates your current cart

Saved Carts

Click on a cart name to view the details.

Cart Name	Created Date	Expiration Date
Desktop for Home 	10-OCT-2001	30-OCT-2001
music	9-OCT-2001	30-OCT-2001

Shared Carts

Click on a cart name to view the details.

Carts Shared With You

Cart Name	Created Date	Expiration Date	Shared By	Role
Hot Deals	12-Mar-2002	12-Mar-2002	Sanjay Narang	Administrator
Published cart	15-Apr-2002	15-Apr-2002	Inderpreet Wadhwa	Participant
computer	12-Mar-2002	12-Mar-2002	Ron Huddleston	Participant
notebook	15-Apr-2003	15-Apr-2003	Ron Huddleston	Viewer


Carts Shared By You

Cart Name	Created Date	Expiration Date
Christmas list	12-Mar-2002	12-Mar-2002
Published cart	15-Apr-2002	15-Apr-2002

The following figure, [Figure 12–3, "My Carts Page - B2C Users"](#), shows a typical My Carts page for B2C customers.


Figure 12–3 My Carts Page - B2C Users

My Carts

 Indicates your current cart

Saved Carts

Click on cart name links to view the details.

Cart Name	Created Date	Expiration Date
Desktop for Home 	10-OCT-2001	30-OCT-2001
music	9-OCT-2001	30-OCT-2001

Shared Carts

Retrieve Shared Cart

Please enter Sharee / Retrieval number from e-mail notification and click on 'Retrieve'

Retrieve

Carts Shared By You

Cart Name	Created Date	Expiration Date
Christmas list	12-Mar-2002	12-Mar-2002
Published cart	15-Apr-2002	15-Apr-2002

For more information, see:

- [Section 12.1.6, "Accessing Saved Carts"](#)

- [Section 12.3.6, "Retrieving Shared Carts"](#)

12.1.6 Accessing Saved Carts

From the My Carts page, customers select a saved cart name hyperlink to retrieve the Saved Cart Details page. This page shows all items in the cart, as well as item prices, sold-to customer information, and shipping/billing information. Note that users without the [IBE_VIEW_NET_PRICE](#) permission will not see discount and net prices.

12.1.6.1 Saved Cart Details Page Activities

From the Saved Cart Details page, the user can perform the following actions:

- **Activate (Update) the Cart** -- Pressing the Update Cart or Checkout buttons activates the cart. When the customer activates the cart, the following occurs:
 - If the customer already is working with an unsaved, active cart with at least one item in it, Oracle iStore automatically system-saves and de-activates this cart. (A system-saved cart displays on the My Carts page, in the Saved Carts area, just as an explicitly-named cart.)
 - If the customer is working on another saved cart or shared cart, Oracle iStore saves these as well.
 - The Pricing Engine verifies item prices.
- **Share the cart** --- If this functionality is enabled, the user may select the Share Cart button to begin the process of sharing the cart.
- **Checkout/Place Order** --- When the customer presses the Checkout button, the cart enters the checkout phase, allowing the user to place an order with the cart. Once the order is placed, the cart is no longer available to the user. Note that B2B users must have the appropriate permissions in their user roles to check out and place orders. See [Section C.6.0.13, "IBE_CHECKOUT"](#), and [Section C.6.0.18, "IBE_CREATE_ORDER"](#), for more information on these permissions.
- **Express Checkout** -- Pressing the Express Checkout button adds cart items to the customer's express checkout queue.
- **Delete the cart** --- Pressing Delete Cart deletes the cart -- the user must confirm the delete. Deleted carts are no longer accessible. Note that if the user is working with an active quote, he will not be able to delete it.
- **View Line Details** --- An active Line Details icon allows access to item-level information, such as ship-to and bill-to customers and addresses, shipping

instructions, and pricing agreement numbers. The Line Details icon appears when any of the following four profiles options is enabled; it will not appear if **all** of these profiles are turned off. Note that in addition to any required merchant setups, B2B users must have the [IBE_USE_PRICING_AGREEMENT](#) and [IBE_VIEW_NET_PRICE](#) permissions in their user roles to access pricing agreement functionality.

The profiles are:

- IBE: Use Line Level Shipping
- ASO: Enable Line Level Billing
- IBE: Use Line Agreements
- IBE: Use Commitments

See also:

- [Section 12.1.7, "Working with the Active Cart"](#)
- [Section 12.1.8, "System-Saved and Default-Named Shopping Carts"](#)
- [Section 12.1.9, "Automatic Re-pricing of Cart Items"](#)
- [Section 12.4.8, "Express Checkout"](#)
- [Section 12.3, "Shopping Cart Sharing"](#)
- [Section 13.7.4.1, "Summary of B2B Permissions"](#)

12.1.7 Working with the Active Cart

The active cart is the cart currently being updated by the user. It always appears under the Shopping Cart subtab within the Cart menu, and has the page title, Your Shopping Cart. Only one cart can be active for a user at a time. To activate a saved or shared cart, the user must press either the Update Cart or the Checkout button in the Saved or Shared Cart Details pages.

When an active cart contains no items, the user will only see the Save and Continue Shopping buttons, along with the Share Cart button, if implemented.

12.1.7.1 Active Cart Activities

In the active cart, the user can perform the following actions:

- **Continue Shopping** --- The customer may select the Continue Shopping button to continue browsing the web site and potentially add more items to the active cart.

- **Express Checkout** --- The customer can press the Express Checkout button to submit the cart as an Express Checkout order. Note that a B2B user must have the [IBE_CHECKOUT](#) and [IBE_CREATE_ORDER](#) permissions in his user role to use Express Checkout.
- **Checkout** --- The customer can press Checkout to enter the checkout phase. Note that a B2B user must have the [IBE_CHECKOUT](#) permission in his user role to see the Checkout button, while the [IBE_CREATE_ORDER](#) permission enables a B2B user's view of the Place Order button in the Review and Place Order page.
- **Enter additional information** -- By selecting the Additional Information hyperlink, the customer can utilize descriptive flexfields to add information about the cart at the cart or item level.
- **Access Pricing Agreements** --- Selecting the Pricing Agreements hyperlink allows access to pricing agreements and commitments. Note that in addition to any required merchant setups, B2B users must have the [IBE_USE_PRICING_AGREEMENT](#) and [IBE_VIEW_NET_PRICE](#) permissions in their user roles to access pricing agreement functionality.
- **Use Promotion Codes** --- Selecting the Promotion Codes hyperlink allows access to promotion codes. To enable the Promotion Code link in the Your Shopping Cart page, set the profile option, IBE: Use Promotion Code. See [Section A.7.0.67, "IBE: Use Promotion Code"](#). Note that in addition to any required merchant setups, B2B users must have the [IBE_VIEW_NET_PRICE](#) permission in their user roles to access promotion code functionality.
- **Add Attachments** --- By selecting the Attachments hyperlink, B2B user can add attachments to the cart.
- **Check Item Availability** --- If the merchant has enabled this feature, users can press the Check Availability hyperlink to check item availability.
- **Save the cart** --- Pressing Save Cart begins the saving process.
- **Save the cart as a list** --- Pressing Save to List allows the customer to save the items to a shopping list.
- **Share the cart** --- Pressing Share Cart begins the share cart process.
- **Delete items** --- The customer can select the Delete icon to remove items from the cart.
- **View item details** -- The customer can select the hyperlinks in the Item column to access details about an item.

- **Change item quantities** -- The customer can enter new quantities in the Quantity text boxes.
- **View item prices** -- Users can see list, unit, discount, and total prices. B2B users must have the [IBE_VIEW_NET_PRICE](#) permission in their user role to see discount and net prices.
- **View tax information** -- Tax rate will display at item or cart level, depending upon setup. B2B users must have the [IBE_VIEW_NET_PRICE](#) permission in their user role to see tax rates.
- **Add services to items** -- If the merchant has enabled service items, the customer can select the Add Service hyperlink to add services to items in the cart, where applicable. Only serviceable items with associated services will display this hyperlink.
- **Reconfigure items** -- If the merchant has enabled configured items, the user can press the Reconfigure hyperlink to begin reconfiguring these items. This retrieves the Configuration Details page for the item.
- **View configured item/model bundle details** -- If the merchant has enabled configured items or model bundles, the user can press the Details hyperlink to view details of a configured or model item in the Configuration Details or Model Bundle pages.
- **Delete the cart** --- Pressing Delete Cart deletes the cart -- the user must confirm the delete. Deleted carts are no longer accessible. Note that if the user is working with an active quote, he will not be able to delete it.
- **Recalculate the cart** --- The user can press the Recalculate button to recalculate the cart totals.

Note that some of this functionality requires additional setup steps.

See also:

- [Section 12.4.8, "Express Checkout"](#)
- [Section 12.1.4, "Active/Saved Carts Process Flow"](#)
- [Section 12.1.12, "Using Promotion Codes in Shopping Carts"](#)
- [Section 12.1.13, "Using Attachments in Shopping Carts"](#)
- [Section 12.1.14, "Checking Item Availability in Shopping Carts"](#)
- [Section 12.1.15, "Shopping Lists"](#)
- [Section 12.3, "Shopping Cart Sharing"](#)

- [Section 12.4, "Checkout and Order Placement"](#)
- [Section 7.8, "Support for Service Items"](#)
- [Section D.2, "Descriptive Flexfield Support"](#)

12.1.7.2 Identification of Active Carts for Users

The following behavior exists with active carts and user identification:

- For returning and guest users for whom there is a cookie, the active cart is identified from the cookie.
- For logged-in users -- when there is no cookie for the user -- the active cart is identified from the database. Otherwise, the active cart is identified from the cookie.
- For guest users who do not have an associated cookie, a new cart is created. The cart creation happens in the background and is transparent to the guest user.

12.1.8 System-Saved and Default-Named Shopping Carts

When a new cart is created by the system --- for example, when a user adds an item to a cart for the first time --- it is given a default name, which can be defined by the merchant. When this default-named cart gets saved while activating another cart, it becomes a system-saved cart and is given the system-saved name, as set up by the merchant.

Example:

1. A user with no active cart selects the Add to Cart button. A cart is immediately created for the user, which is now the user's active cart (Cart A).

At this point, the system has named Cart A, "Store" (this name can be specified by the merchant -- see [Section 12.1.8.1, "Naming Behavior for System-Saved and Default-Named Carts"](#)).

2. The user leaves this active cart (Cart A) and navigates to the My Carts page. He selects a previously saved cart (Cart B) and updates/activates it (by pressing Update or Checkout button).

At this point, the system gives Cart A the default system-saved name, "Store Saved" (this name can be specified by the merchant -- see [Section 12.1.8.1, "Naming Behavior for System-Saved and Default-Named Carts"](#), below).

3. At any point in this process, the user can explicitly save the cart by selecting the Save Cart button. See [Section 12.1.4, "Active/Saved Carts Process Flow"](#), for more information.

12.1.8.1 Naming Behavior for System-Saved and Default-Named Carts

The default name given to default-named and system-saved carts can be controlled by mapping a source file to the message-class media objects associated with these carts, or by updating the FND message text in Oracle Forms.

Note: It is not required that you change the names of system-saved and default-named carts. By default, their names will be `Store` (default-named) and `Store Saved` (system-saved). However, these names can be changed if desired.

Out-of-the-box, these media objects have no site/language mapping. Oracle iStore uses the `DisplayManager.getTextMediaOrFndMsg` API to get the cart name, and this API returns a custom prompt (media object site/language mapping), if defined; otherwise, it returns the FND message text.

A cart name can be mapped to all sites and all languages, or can be mapped by site/language, using standard Oracle iStore media object site mapping functionality. For more information, see [Section 9.3, "Understanding Media Objects"](#).

To change the name of the carts using Oracle Applications text messages, you can update the FND message text. See [Section 15.2, "Modifying Text Messages"](#), for steps.

Following are the values for the two message-class media objects for default-named and system-saved carts:

- **iStore Default-Named Cart Name** media object:
 - Programmatic access name:** `IBE_PRMT_SC_UNNAMED`
 - Default FND message text:** `Store`
- **iStore System-Saved Cart Name** media object:
 - Programmatic access name:** `IBE_PRMT_SC_DEFAULTNAMED`
 - Default FND message text:** `Store Saved`

12.1.9 Automatic Re-pricing of Cart Items

Items in shopping carts get re-priced any time a user updates the cart. This includes, for example, adding items to the cart or changing shipping/billing information. Assuming IBE: Use Price list Associated with Specialty Site profile is Yes (meaning

that the site where the user is shopping is using a site-based, assigned price list), if an item has been re-priced on the assigned price list, the Pricing Engine finds and displays the correct, updated price. In the case where an item in the user's cart has been removed from the price list, then an error message will display in the cart.

If IBE: Use Price list Associated with Specialty Site profile is No, Oracle iStore will be retrieving "best prices" dynamically from the Pricing Engine, and will not be retrieving prices from a static price list (except for guest users). In this case, if an item has been deleted from available price lists, an error will occur when the user updates the cart. See [Chapter 10, "Implementing Pricing"](#), for more information on pricing.

12.1.10 Using Additional Information (DFFs) in Shopping Carts

Oracle iStore allows you to set up cart- and item-level descriptive flexfields (DFFs) in the shopping cart to capture customer information. The Additional Information link in the Your Shopping Cart page is enabled for this purpose after setup. See [Section D.2, "Descriptive Flexfield Support"](#), for details.

12.1.11 Using Pricing Agreements in Shopping Carts

A B2B user with the [IBE_USE_PRICING_AGREEMENT](#) and [IBE_VIEW_NET_PRICE](#) permissions in his user role will see the Pricing Agreements link in the Your Shopping Cart page. Pricing Agreements must first be implemented before they can be selected by a user. See [Section 10.5, "Pricing Agreements"](#).

Cart-level and item-level scenarios are possible with pricing agreements:

- **Cart-Level Agreements** --- When the user selects the Pricing Agreements link, the page displays the Cart Agreement section, which show any previously assigned agreements. To select a new agreement, the user selects the Assign Agreement button to select from a list of agreements that have been implemented.
- **Item-Level Agreements** --- If the profile option, IBE: Use Line Agreements, has been enabled, the user also sees a section entitled Item Agreements. In this section, the user can use the Assign Agreement and Remove Agreement buttons to add/remove item-level agreements in the shopping cart. Note that service items and promotional items are not shown.

12.1.12 Using Promotion Codes in Shopping Carts

The Promotion Codes link in the Your Shopping Cart page allows both B2C and B2B users to enter promotion codes. Promotion codes are modifiers set up through the Oracle Order Management Pricing module.

To enable the Promotion Code link in the Your Shopping Cart page, set the profile option, IBE: Use Promotion Code. See [Section A.7.0.67, "IBE: Use Promotion Code"](#). Note that in addition to any required merchant setups, B2B users must have the [IBE_VIEW_NET_PRICE](#) permission in their user roles to access promotion code functionality.

See the *Oracle Order Management Suite Implementation Manual* for additional information.

After the user selects the Promotion Codes link, the Promotion Codes area displays with any previously entered promotion codes. To enter a new promotion code, the user presses the Add Promotion Code button and enters the code in the Promotion Code textbox. The user selects the Apply button to save the entry.

The Promotion Codes link is enabled/disabled by the profile option, IBE: Use Promotion Code. See [Section A.7.0.67, "IBE: Use Promotion Code"](#).

12.1.13 Using Attachments in Shopping Carts

A B2B user with the [IBE_USE_ATTACHMENT](#) permission in his user role will see the Attachments link in the Your Shopping Cart page. The Attachments functionality is not available for B2C users.

To use the Attachments functionality, set the profile option, IBE: Attachment Document Category. See [Section A.7.0.24, "IBE: Attachment Document Category"](#).

After the user selects the Attachments link, the screen shows any previously selected attachments associated with the cart. To add an attachment from the file system, the user selects the Add Attachment button. In the file retrieval page that displays, the user selects the Browse button to select the attachment from the file system. Optionally, the user can enter a description for the file in the Description textbox. The user selects the Apply button to save the file selection.

12.1.14 Checking Item Availability in Shopping Carts

Both B2B and B2C users can select the Check Availability link in the Your Shopping Cart page to check whether items in their carts will be available for shipping by a specified date. You must first set up Available to Promise functionality (ATP) before it will be available in the shopping cart. See [Section 7.4, "Providing Regular](#)

[Available to Promise \(ATP\)](#)", and [Chapter 21, "Integrating Oracle iStore with Oracle Advanced Supply Chain Planning"](#).

After the user selects the Check Availability link, the page displays a list of cart items, along with a calendar icon to select the date for which the customer would like to check availability. The user selects the date(s), then presses the Check Availability button to display the availability information in the table column labelled Availability Info.

12.1.15 Shopping Lists

Shopping lists allow users to save items in shopping carts to lists. Users can copy items from these lists into their active cart. Shopping lists never expire. Users cannot check out with a shopping list. Shopping lists are accessible in the My Shopping Lists subtab in the Cart menu in the Customer UI. The most recently saved list appears first in the table. Users can update a shopping list at any time by selecting the hyperlink of the list name. See [Section 12.1.15.1, "Shopping List Process Flow"](#), below, for more information on the actions that can be performed in the shopping list details page.

Note that Express Checkout is not allowed from a shopping list, but can be accessed after the user drills down into the item details (assuming Express Checkout is enabled).

Note that service items and promotional items are not candidates for shopping lists.

The IBE: Use Shopping Lists profile option controls whether the shopping list functionality is available to users. See [Section A.7.0.76, "IBE: Use Shopping Lists"](#).

12.1.15.1 Shopping List Process Flow

Following is the process flow for shopping lists:

1. User presses the Save To List button in the Your Shopping Cart page.
2. The system prompts the user to:
 - Enter a new name for the list -- the list name must be unique. In this case, the user can also enter some brief comments to associate with the list. Comments cannot be updated.
 - Merge the items to an existing list (if one exists)
 - Replace the items in an existing list (if one exists)

The user's current active cart -- including the items in it -- remains the active cart when a shopping list is saved.

3. To retrieve a shopping list, the user navigates to the My Shopping Lists page within the Cart menu, and selects the hyperlink of the desired list name. The Shopping List Details page appears.
4. To add items to a cart, in the Shopping List Details page, the user selects the appropriate items in the shopping list and presses Add to Cart.
5. Optionally, in the Shopping List Details page, the user also can:
 - Update quantities for items in the list by entering the numerical values in the Quantity field and pressing the Update Quantity button.
 - Delete items in the list by activating an item's Select checkbox and pressing the Delete button (not the Delete List button).
 - Drill down to product details by selecting the hyperlink of an item name. At this point, the user can add the item to a new cart and checkout, including Express Checkout.
 - Delete the entire list by selecting the Delete List button.
6. Once the user presses Add to Cart from the Shopping List Details page:
 - If an active cart with items is in use by the user, the selected items are added to the existing active cart, the Your Shopping Cart page. Duplicate items are merged if the profile option, IBE: Merge Shopping Cart Lines, is enabled.

Note that there are exceptions to the above for specific types of products -- see [Section 12.1.19, "Merging Duplicate Items in Cart"](#), for additional details.
 - If no active cart exists, a new cart is created which is the user's active cart.
 - The shopping list still will continue to appear in the My Shopping Lists page, with the original items in it.
7. The user can perform normal activities with the active cart. For more information on these flows, see: [Section 12.1.7, "Working with the Active Cart"](#).

12.1.15.2 Shopping Carts and Shopping Lists Serve Different Purposes

Shopping carts and shopping lists serve different purposes for Customer UI users. The following two sections note some differences and similarities between the use of shopping carts and shopping lists.

12.1.15.2.1 Shopping Carts

Shopping carts are transactional entities used to checkout with and purchase products from the Customer UI.

- Shopping carts are associated with the organization specified in the MO: Operating Unit profile option. In this way, the same shopping cart can potentially be accessed across different sites.
- The user creates a shopping cart by pressing the Add to Cart button in the catalog pages.
- The merchant can set an expiration time period for carts.
- Shopping carts can be shared with other users, if this functionality is enabled.
- Shopping carts contain transactional data (item prices, shipping/handling, tax, and total amounts) and customer information (addresses, billing, and shipping preferences).

12.1.15.2.2 Shopping Lists

Shopping lists are non-transactional entities that store products the user may wish to purchase. They help to enable future repeated purchases.

- The user creates a shopping list by pressing the Save to List button from active cart (Your Shopping Cart page).
- The merchant can turn shopping list functionality on/off with a profile option.
- Users can add comments to shopping lists.
- A shopping list must have a unique name when saved.
- A shopping list never expires.
- Shopping lists do not contain any transactional information, such as item prices; they also do not show customer address, billing, or shipping data.
- A shopping list cannot be shared with other users.

12.1.16 Shopping Cart Security

Oracle iStore uses security authentication to keep different users from accessing each others' shopping carts and shopping lists by manipulating the URL. When a user attempts to retrieve a cart, Oracle iStore verifies that the user is actually the owner of the shopping cart or a user to whom the cart has been shared; if the user is found to be neither the owner nor a recipient of the cart, then access is denied.

12.1.17 Tax Display in Shopping Carts

Oracle iStore supports both cart-level and item-level tax display in the shopping carts.

Tax information is set up in Oracle Receivables. See the *Oracle Receivables User Guide* for information on how to set up taxes.

12.1.17.1 Cart-Level Tax Display

Out-of-the-box, Oracle iStore displays cart-level tax only. Cart-level tax display includes the following, applicable to a specific cart:

- Tax codes (tax printable name)
- Tax rate
- Taxation amounts

12.1.17.2 Item-Level Tax Display

If enabled, item-level taxes applicable to the item are displayed below every item in the shopping cart.

To display item-level taxes, map the logical template, STORE_CART_LINE_TAX, to the JSP page, ibeCScdShowCartLineTax.jsp, which is provided by Oracle iStore. Map the template for the sites in which you wish to display item-level taxes.

To map the template, see [Section 8.11, "Mapping Source Files to Display Templates"](#).

12.1.17.3 Displaying Amounts for More than One Tax Code

Some countries charge more than one tax (for example: VAT, local tax, provincial tax). In such cases, Oracle iStore will display the applicable amounts for each tax code at the cart level. If item-level tax display is enabled, the applicable amounts for each tax code for the item are displayed.

12.1.18 Shopping Cart Expiration Values

Two profile options control the number of days that active and saved carts are available to users before they expire. Carts expire at the end of the day on the day they are scheduled to expire. Expired carts are no longer accessible to users. The expiration date gets reset every time the cart is updated by the user. Note that when you change the value of the expiration profile options, existing saved carts are not affected. Shopping cart expiration dates are shown on the Your Shopping Cart and My Carts pages.

1. To set the expiration for *active* carts, set the profile option, IBE: Active Cart Expiration Duration (# days). See [Section A.7.0.21, "IBE: Active Cart Expiration Duration \(# days\)"](#).
2. To set the expiration for saved carts, set the profile option, IBE: Saved Cart Expiration Duration. See [Section A.7.0.50, "IBE: Saved Cart Expiration Duration \(# days\)"](#).

12.1.19 Merging Duplicate Items in Cart

You can enable Oracle iStore to merge lines on an order if the items are identical. In this case, Oracle iStore increases the quantity by one for each identical item merged.

This ability is controlled by setting the profile option, IBE: Merge Shopping Cart Lines. See [Section A.7.0.43, "IBE: Merge Shopping Cart Lines"](#).

Important: If you set this profile option to Yes, you must set the profile option, IBE: Use Line Level Shipping, to No. You cannot enable shopping cart item merging and item splitting simultaneously. For more information on item level shipping, see [Section 11.7.5, "Allowing Item Level Shipping Methods"](#).

12.1.19.1 Exceptions to and Rules for Merging for Specific Setups

Note the following exceptions and rules for specific setups:

- Duplicate serviceable items --- If IBE: Use Item Level Service is enabled for Service Items Support functionality, no merging takes place. In this case, the items are added to the cart as a unique entry.
- Duplicate promotional goods (PRGs) are never merged.
- Duplicate configured items are never merged.
- When site as pricing qualifier is in effect for a site, Oracle iStore uses the price list associated with most-recently accessed site for the price of merged items. If the merge profile is off, Oracle iStore uses the price list associated with the site where the items were added to the cart.

12.1.20 Decimal Quantities for Cart Items

When adding an item or updating quantity in the Oracle iStore shopping cart, the customer can enter a decimal quantity if the item is divisible. Oracle iStore calls the same API used by Oracle Order Management for validating quantity. If an item is marked OM Indivisible, decimal quantities are not allowed for its primary unit of measure (UOM).

To prevent the customer from selecting a decimal quantity of an item, log into Oracle Forms with Inventory responsibility for the master inventory organization, and mark the OM Indivisible flag. See the *Oracle Inventory User's Guide* for more information.

12.2 Direct Item Entry

Oracle iStore's Direct Item Entry functionality allows users to quickly add multiple items to a shopping cart without the need for browsing for items, adding them to cart, and then checking out with them. This functionality is available for B2B users only.

This section's main topics include:

- [Section 12.2.1, "Direct Item Entry Benefits"](#)
- [Section 12.2.2, "Direct Item Entry Process Flow"](#)
- [Section 12.2.3, "Process Flow for Uploading Comma Separated Values File"](#)
- [Section 12.2.4, "Implementing Direct Item Entry"](#)

12.2.1 Direct Item Entry Benefits

Direct Item Entry allows:

- Users to enter data quickly without having to add items one at a time from the catalog.
- Users to enter customer part number and/or Inventory part number and check out with these items in the cart.
- Users to place orders with the company's internal part numbers if merchant-to-customer part number mapping in Oracle Inventory is set up.
- Users to upload comma separated values (.csv) files containing relevant values for customer part number, Inventory part number, unit of measure (UOM) and quantity.

Note: Model bundles, configured items, and serviceable items can be entered through the form; however, after adding to cart, these must be configured separately from the cart. For example, if you add a serviceable item to the form and then add to cart, you must add the service separately from the cart.

In the case where multiple Inventory part numbers are mapped against a single customer part number, only the highest ranked Inventory part number will be displayed.

12.2.2 Direct Item Entry Process Flow

The process flow for Direct Item Entry is as follows:

1. A registered B2B user logs into a specialty site and selects the Cart > Direct Item Entry. The Direct Entry Form appears.
2. The user enters the following and selects Fill Details:
 - Customer part numbers -- Requires item mapping in Inventory.
 - Inventory part numbers -- If only Inventory part number is entered, Oracle iStore does not automatically enter the customer part number.

Note that either a customer or an Inventory part number is required at minimum.

If the user provides both the customer and Inventory part numbers in a line, customer number takes precedence. If the user enters an invalid part number, the invalid customer or Inventory part number is preserved in the textbox.

- Quantities - If no input value is found for the item quantity, the default value of 1 is assumed.

If the user presses Add to Cart before pressing Fill Details, the primary UOM is defaulted for items.

3. Oracle iStore populates the primary UOMs and item names into the form.
Note: To increase the number of rows in the form, set the profile options, IBE: Additional Table Rows and JTF_PROFILE_DEFAULT_NUM_ROWS. See [Section 12.2.4.2, "Set Optional Profile Options"](#), for details.
4. If the profile option, IBE: Retrieve all Units of Measure for an Item, is set to Yes, the user can select different values for UOMs.
5. For each item to be added to the shopping cart, the user selects the appropriate item checkbox and presses Add to Cart. All items selected are added to the user's active cart. Items not selected are not saved into the form. However, if the add-to-cart action fails, the user is returned to the Direct Item Entry form with values intact.
6. The user proceeds with checkout.

12.2.3 Process Flow for Uploading Comma Separated Values File

To populate the Direct Item Entry form, users can upload a comma separated values (.csv) file containing relevant values for customer part number, Inventory part number, UOM, and quantity. The .csv file must contain customer part number **or** Inventory part number. If the file contains neither UOM nor quantity, Oracle iStore defaults these values to primary UOM and 1 (for quantity), respectively. If neither the customer part number nor Inventory part number for an item are specified in the file, the Direct Item Entry form ignores the item, and does not upload any data for it.

The process flow for Direct Item Entry using a .csv file is as follows:

1. A registered B2B user logs into a specialty site and selects Cart > Direct Item Entry. The Direct Entry Form appears.
2. The user presses Upload to retrieve the Upload File page. From this page, he chooses the appropriate .csv file from the file system.

Note: The number of items that can be uploaded at a single given time is determined by the profile option, IBE: Maximum Direct Entry Rows.

3. The user selects the Apply button to upload the file and validate the item information. Oracle iStore addresses common file errors as follows:
 - If the file is corrupted, Oracle iStore displays an error message in the Upload File page, and the file will not be uploaded.
 - If invalid part numbers are found, Oracle iStore displays an error message in the Direct Item Entry page.
 - If the user specifies an invalid UOM in the .csv upload file, the primary UOM is selected.
4. For each item to be added to the shopping cart, the user selects the appropriate item checkbox and presses Add to Cart. Items are added to the user's active cart. Items not selected are not saved into the form. However, if the add-to-cart action fails, the user is returned to the Direct Item Entry form with values intact.
5. The user proceeds with checkout.

See also: [Section 12.2.4.4, "Set up Comma Separated Values File"](#)

12.2.4 Implementing Direct Item Entry

To set up Direct Item Entry, follow the steps below. These steps assume a site has been implemented and contains valid products -- only items that can be purchased via the site catalog are considered valid items.

- [Section 12.2.4.1, "Set Mandatory Profile Option"](#)
- [Section 12.2.4.2, "Set Optional Profile Options"](#)
- [Section 12.2.4.3, "Set up Item Mapping"](#)
- [Section 12.2.4.4, "Set up Comma Separated Values File"](#)

12.2.4.1 Set Mandatory Profile Option

Set the following mandatory profile option:

- **IBE: Use Direct Item Entry** --- Set to Yes. See [Section A.7.0.60, "IBE: Use Direct Item Entry"](#).

12.2.4.2 Set Optional Profile Options

Set the following profile options according to your business requirements:

- **IBE: Additional Table Rows** --- Determines the number of rows to add when a user selects Add More Rows. Set to a reasonable integer. See [Section A.7.0.23, "IBE: Additional Table Rows"](#).
- **IBE: Maximum Direct Entry Rows** --- Sets the row limit for the form; also sets the maximum items that can be uploaded via .csv file. See [Section A.7.0.42, "IBE: Maximum Direct Entry Rows"](#).
- **IBE: Retrieve all Units of Measure for an Item** --- Allows multiple UOM value retrieval. Set to Yes, so that all UOMs can be retrieved for items. See [Section A.8.0.83, "IBE: Retrieve all Units of Measure for an Item"](#), and [Table 12-1, "Using Profile Options to Display UOMs"](#).
- **IBE: Use Price List Associated with Specialty Site** --- Set to Yes or No depending upon business need. See [Section A.8.0.85, "IBE: Use Price List Associated with Specialty Site"](#), and [Table 12-1, "Using Profile Options to Display UOMs"](#), for more information.
- **JTF_PROFILE_DEFAULT_NUM_ROWS** --- Determines the default number of rows displayed in the Direct Item Entry form. Set at site level to a reasonable integer. See *Oracle Applications CRM System Administrator's Guide*.

Note: The profile option, IBE: Use Price List Associated with Specialty Site, also affects the display of UOMs in the Direct Item Entry. The following table, [Table 12–1, "Using Profile Options to Display UOMs"](#), details the behavior.

Table 12–1 Using Profile Options to Display UOMs

If IBE: Retrieve All UOMs for an Item is set to...	And if IBE: Use Price List Associated with Specialty Site is set to...	UOM Display Behavior
Yes	No	Oracle iStore displays all UOMs defined in Inventory for the item. These UOMs are displayed irrespective of whether they have valid prices or not.
Yes	Yes	Oracle iStore displays all UOMs defined in Inventory for the item. It verifies whether each UOM has a valid price.
No	Yes	Oracle iStore displays only primary UOM defined in the price list for the item. It does not check whether UOM has valid price.
No	No	Oracle iStore displays only primary UOM defined in price list for the item. It does not check whether UOM has valid price.

12.2.4.3 Set up Item Mapping

Optionally, set up Item Mapping in Oracle Inventory. Before B2B customers can use their companies' internal part numbers for Direct Item Entry, mappings must be established between the customer items and the merchant items in Oracle Inventory. For directions, refer to the *Oracle Inventory User's Guide*.

The guides discussed in this section are available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

12.2.4.4 Set up Comma Separated Values File

This section contains information regarding the use of the .csv file upload utility.

The format of the .csv file can be defined in two ways:

1. [Create Header Containing Pre-Defined Codes](#)
2. [Utilize Pre-Defined Fixed Format](#)

See also: [Rules for Using Either Format](#)

12.2.4.4.1 Create Header Containing Pre-Defined Codes When using a header containing pre-defined codes to identify columns, the codes map to the following meanings, as shown in [Table 12–2, "Codes and Meanings for .Csv File"](#).

Table 12–2 Codes and Meanings for .Csv File

Code	Description
CUST_NUM	Customer part number
INV_NUM	Inventory part number
UOM	Unit of Measure
QTY	Quantity

The user can create a header row using the codes in the order desired. The codes are case sensitive. If using this method, the header row must contain at least INV_NUM or CUST_NUM. The following table, [Table 12–3, "Sample Columns for .Csv Upload File"](#), shows an example of how these codes could be used in practice in a .csv to populate the Direct Item Entry Form.

Table 12–3 Sample Columns for .Csv Upload File

CUST_NUM	INV_NUM	UOM	QTY
Desktop	A123456	Ea	4
Laptop	A123457	Ea	2

Note: The .csv file can be created using Microsoft Excel and saving the file in .csv format.

12.2.4.4.2 Utilize Pre-Defined Fixed Format To utilize the fixed format, the .csv file cannot contain a header row. When using this method, the fixed format must be in the following order:

- Customer part number
- Inventory part number
- UOM code
- Quantity

12.2.4.4.3 Rules for Using Either Format For either formats the following rules apply:

- UOM code and quantity are optional values in the .csv file for each line entry.
- If the UOM code is not specified, then the valid UOM list for that part number is displayed with primary UOM selected.
- If the customer number is not specified, the Inventory number must be provided, otherwise the line is ignored.
- If the Quantity is not specified, a default quantity of 1 is used.

12.3 Shopping Cart Sharing

This section contains topics related to shopping cart sharing for Oracle iStore's Customer UI. Main topics include:

- [Section 12.3.1, "Cart Sharing Overview"](#)
- [Section 12.3.2, "Shared Cart Behavior"](#)
- [Section 12.3.3, "Shared Cart Roles"](#)
- [Section 12.3.4, "Sharing Carts"](#)
- [Section 12.3.5, "Re-sharing Carts"](#)
- [Section 12.3.6, "Retrieving Shared Carts"](#)
- [Section 12.3.7, "Requesting Assistance or Rejecting T&Cs with Shared Carts"](#)
- [Section 12.3.8, "Additional Rules and Guidelines for Shared Cart Members"](#)
- [Section 12.3.9, "Quote Sharing"](#)
- [Section 12.3.10, "Implementing Shared Carts"](#)

12.3.1 Cart Sharing Overview

Oracle iStore's shopping cart sharing functionality allows multiple users to shop and purchase products collaboratively, utilizing the same shopping cart. Cart sharing has the following main features:

- **Collaborative purchasing** --- All Customer UI registered users -- both B2B and B2C users -- can share shopping carts with any number of other iStore users. This enables multiple users to make changes to a shopping cart (depending upon their share cart roles). The updates can be seen in real-time by other users sharing the cart. Cart members with appropriate permissions can then place an order with the cart.

- **Available to B2B and B2C users** --- The functionality is available to both B2B and B2C users, with the following rules:
 - B2B users are only allowed to share carts with other registered users within their organization who use the same account number; and, the search utility will only retrieve users matching this criteria.
 - B2C users can share carts with any other user who has a valid e-mail address. Recipients must be registered Oracle iStore users, however, to update the shared cart.
- **E-mails keep members informed of activity** --- Several Oracle iStore notification event e-mails keep members informed about shared cart actions. For example, when the administrator stops sharing a cart or an order is placed with a shared cart, all recipients are notified by e-mail that the cart is no longer available. The e-mails are sent automatically to the member (provided the sharing member selects the Notify checkbox in the screen), through integration with Oracle Workflow. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for a list of and details about these notification events.
- **Shared cart roles** --- The user who initiates a shared-cart action is the cart owner, usually with administrator privileges. Only members with cart administrator role can stop sharing a cart or set roles for the other members. Users who are receiving the shared carts are called cart participants or viewers, depending upon their roles. See [Section 12.3.3, "Shared Cart Roles"](#), for more information.
- **Available for all cart types and statuses** --- Carts can be in active or saved status to be shared. A cart can be shared in the shipping/billing pages as well.
- **Flexibility** --- At any time, a cart administrator can delete the cart, add/remove recipients, or place the order. Members are automatically notified when a shared cart is deleted or when the administrator has stopped sharing the cart (provided the administrator has elected to notify the members by selecting the Notify checkbox next to the member's name in the UI).
- **Re-share Carts** --- B2B users can re-share shopping carts with other iStore users. Owners of shared carts can update cart members and member roles at any time.

See [Section 12.3.2, "Shared Cart Behavior"](#), for additional information.

12.3.2 Shared Cart Behavior

The following points describe shared cart behavior:

1. If a user has a cart with items in it before signing in, and after sign-in --- if the last active cart was a shared cart --- then the shared cart will become de-activated (i.e., saved), and the user will continue to have the unsaved cart as the active cart.
2. For B2B users, only other site users within their organization and using the same account can be the recipients of a shared cart.
3. B2C users can share with anyone who has a valid e-mail address. These users do not need to be registered Oracle iStore users to receive the notification e-mail and view the cart, but will need to register to update the cart in any way.
4. In order to update a shared cart, a user must be a registered Oracle iStore user.
5. Where a B2B user does not have an e-mail address in the system, the member sharing the cart can specify an ad hoc e-mail address for the user. This e-mail address will be used to send an e-mail to the user, but it will not be entered into the personal information section. This allows the member to know that a cart has been shared with him, and lets him add the desired e-mail address for his recorded contact information.
6. Field-level validations are done on e-mail addresses entered. When entering e-mail addresses, users should use standard e-mail format.
7. When searching for members, there is no need for users to utilize a wildcard in the search textbox -- they can simply enter text and select Go. There is no search mechanism for B2C users.
8. Cart retrieval by B2C users is always done using the URL in the e-mail notification message, or by entering the unique cart retrieval number in the My Carts page within the Cart menu. For B2C users, the cart retrieval textbox always appears in this page.
9. Cart retrieval by B2B users is always done via the URL in the e-mail notification message, or by accessing the *Carts Shared With You* area of the My Carts page within the Cart menu.
10. For backward compatibility with the Sharee Number of previous Oracle iStore releases, a profile option can be set to enable B2B users of previous releases to use a Sharee Number. This allows the B2B recipient to enter the Sharee Number from a notification and retrieve the cart. See [Section 12.3.10.2, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#), for details.
11. Only specific users can request sales representative assistance or reject Terms and Conditions -- see [Section 12.3.7, "Requesting Assistance or Rejecting T&Cs with Shared Carts"](#).

12. All members get e-mail messages with details of the shared cart, if the user sharing the cart elects to notify them by selecting the Notify checkbox next to the member's name in the UI. The e-mail notifications leverage Oracle iStore's integration with Oracle Workflow. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for more information.
13. In a B2B scenario, recipients with administrator role can delete carts shared with them. In a B2C scenario, administrators cannot delete carts shared with them. Note that if the user is working with an active quote, he will not be able to delete it.
14. Cart pricing will always be done based on the sold-to customer who is the owner of the cart.
15. Shared cart expiration behaves the same way as any saved cart. See [Section 12.1.18, "Shopping Cart Expiration Values"](#).
16. If a shared cart is active, user can select Save Cart, and the shared cart will be de-activated. A new cart will be created for the user when an item is added. The de-activated cart will still be available in the list of shared carts.
17. Multiple members can activate and work on a shared cart simultaneously. Changes made to the shared cart are immediately visible to the owner and all members.
18. Members of a shared cart have access to attachments added to the cart by the owner.

12.3.3 Shared Cart Roles

The following are the B2B and B2C share cart roles:

- Administrator
- Participant
- Viewer

The names and descriptions of these seeded values can be changed. See [Section 15.6, "Modifying Oracle Application Object Library Lookups"](#), for details.

Important: Actions that B2B cart administrators can perform in most cases do not apply to B2C cart administrators. For B2C users, only the cart *owner* has full permissions to perform actions with a shared cart. B2C cart administrators have lesser permissions than B2B cart administrators.

The following table, [Table 12–4, "Share Cart: Roles and Permissions"](#), discusses roles and the actions the users can perform.

Table 12–4 Share Cart: Roles and Permissions

Role	Permissions
Administrator	<ul style="list-style-type: none">■ Place order with the cart/quote■ Remove/modify existing members of the cart/quote *■ Change roles of members *■ Add comments/notify members■ Add new members to the cart/quote *■ Stop sharing carts/quotes *■ Re-share cart/quote *■ Delete carts (but not quotes) *■ Request sales assistance for carts/quotes *■ Disagree with terms and conditions■ Track order placed with cart/quote *
Participant	<ul style="list-style-type: none">■ Update carts/quotes■ Add comments/notify members■ Review terms and conditions
Viewer	<ul style="list-style-type: none">■ View carts/quotes■ Add comments/notify members■ Review terms and conditions
* B2B admins only; B2C must be cart owner	

Note that cart owners (the user who initiates the cart sharing) always has at least administrator permissions.

See also: [Section 12.3.7, "Requesting Assistance or Rejecting T&Cs with Shared Carts"](#), [Section 12.3.6, "Retrieving Shared Carts"](#), and [Section 12.3.8, "Additional Rules and Guidelines for Shared Cart Members"](#).

12.3.4 Sharing Carts

The process flow for sharing carts is as follows.

1. A customer visits a site and adds items to the shopping cart.

2. The customer selects the Share Cart button to begin the sharing process. This retrieves the Share Cart page. The Share Cart page shows all cart items, customer name and address, and shipping and billing information. The item names are hyperlinks which customers can utilize to view item information. In this page, the customer must enter a cart name.
3. Selecting members and setting member roles is different for B2B and B2C cart owners:

- **B2B Users** --- In the Share Cart page, a B2B user selects the Add Member button. Using the Search and Select: Members page, he searches for users within his organization using the same financial account. Oracle iStore automatically adds a wildcard to the end of any criteria entered, and searches on the *first name field* of Contact Name.

From the search results, he selects the applicable members, and is returned to the Share Cart page, where he selects roles for each member.

Important: Other B2B members on the cart also must have access to the same financial account as the owner's session account when he initially shared the cart -- if they do not, they will not be able to update the cart.

- **B2C Users** --- The B2C customer will see a different version of the Share Cart page. For the B2C customer, there is no Add Member button -- instead, B2C customers simply enter in textboxes the names and valid e-mail addresses of the members in the Share Cart page, and then select the appropriate roles for the members.

See [Section 12.3.3, "Shared Cart Roles"](#), for information about shared cart roles and the permissions allowed by each role.

4. Once the members have been chosen and their roles set, in the Notify column of the Share Cart page, the owner can choose to notify all members on the cart or only specific members. A mark in the Notify checkbox means that the member will receive an e-mail informing him about the shared cart.
 - E-mail notifications leverage Oracle iStore's integration with Oracle Workflow. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for details.
5. In the Comments field of the Share Cart page, the owner can enter comments to include with the e-mail notification. Only members who have had their Notify checkbox marked will receive the e-mail and the comments.
6. The owner selects the Apply button to complete the share process, and Oracle iStore displays a confirmation message.

7. All B2B administrators on the cart can subsequently re-share this cart. See [Section 12.3.5, "Re-sharing Carts"](#), for more information.

12.3.5 Re-sharing Carts

After a cart has been shared, B2B members with the administrator role can re-share the cart. Only B2C cart owners can perform this type of action with a shared cart.

The process flow for resharing carts is as follows.

1. An administrator accesses the Shared Cart Details page for a specific cart, and then selects the Update Member button. For information on accessing shared carts, see [Section 12.3.6, "Retrieving Shared Carts"](#).
2. In the Update Member page, the administrator selects the Add Member button to access the search screen for users within his organization.
3. From this point, the flow is identical to sharing a cart for B2B users. See [Section 12.3.4, "Sharing Carts"](#).

12.3.6 Retrieving Shared Carts

Following is the shared cart retrieval flow for recipients -- notice that the process is somewhat different for B2C members:

- **Using the e-mail notification:** The shared cart e-mail notification message supplies a hyperlink which retrieves the Shared Cart Details page for a specific cart. For B2C users, the cart details appear without requiring the user to log in. For B2B users, the user must log in to view the cart. To update, re-share, or check out with the cart, both B2B and B2C users must log in. This method can be used by both B2C and B2B users.
- **Using the My Carts page:** Users can access the Carts Shared With You area of the My Carts page to retrieve shared carts.
 - B2B users select a cart name hyperlink, and then log in, to view the Shared Cart Details page.
 - B2C users enter a cart retrieval number provided in the e-mail notification. (When a user shares a cart, a unique cart retrieval number is generated for each recipient. The owner can see the cart retrieval number in the Share Cart Confirmation page and in the My Carts page.)
- **Using the Welcome bin:** Customers also can select the Retrieve Saved/Shared Carts link in the Welcome bin -- this retrieves the My Carts page.

To see examples of the My Carts page for B2B and B2C users, see [Figure 12–2, "My Carts Page - B2B Users"](#), and [Figure 12–3, "My Carts Page - B2C Users"](#).

See also:

- [Section 12.3.8, "Additional Rules and Guidelines for Shared Cart Members"](#)
- [Section F.5, "Process Flow for Cart Sharing and Retrieval"](#)

12.3.7 Requesting Assistance or Rejecting T&Cs with Shared Carts

Sales representative assistance is available for shared carts, providing the functionality has been implemented -- see [Section 14.2, "Sales Assistance"](#).

The following points describe the application behavior with this functionality:

1. All members can review Terms and Conditions (T&Cs) on a shared cart, but only shared cart administrators (both B2B and B2C) can request sales assistance or reject T&Cs.
2. When a member requests sales assistance, an e-mail notification is sent to the sales representative, following standard sales assistance functionality. The notification includes the contact information (phone number and e-mail) of the requestor.
3. Any comments entered by the requestor are sent to the sales representative, but are not seen by the cart owner (unless the owner is the requestor).
4. After a member requests sales assistance, all members are assigned the viewer role except the requestor and the owner (who could be the same user); these users keep their current role. Further:
 - a. Any member whose role was changed to viewer receives an e-mail notification telling him his access level was changed.
 - b. Any member who was already a viewer will get a generic shared cart e-mail notification, saying something to the effect, *User X has suggested that you review the cart.*
 - c. If the sales assistance request comes from a user who is not the cart owner, the owner also receives this generic e-mail notification.
5. When an administrator who is not the cart owner requests sales assistance or rejects T&Cs, other members on the cart can no longer update it --- at this point, only the cart owner and the administrator who requested assistance/rejected T&Cs can update the cart.

Note: What users can update on quotes depends on the profile option, IBE: Allow Update for Draft Quotes. See [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#), for more information.

See also: [Section 30.2, "Using Terms and Conditions"](#).

12.3.8 Additional Rules and Guidelines for Shared Cart Members

See the following sections for additional guidelines and rules related to share cart members:

- [Section 12.3.8.1, "Rules and Guidelines for Recipients"](#)
- [Section 12.3.8.2, "Rules and Guidelines for Administrators"](#)
- [Section 12.3.8.3, "Pricing and Payment Rules for All Shared Cart Users"](#)

12.3.8.1 Rules and Guidelines for Recipients

Following are some additional guidelines regarding recipients:

- Even if a B2B user has the appropriate shared cart role to checkout or place an order with a shared cart, he also must have the appropriate user permissions in his user role to checkout or place an order. See [Section C.6.0.13, "IBE_CHECKOUT"](#), and [Section C.6.0.18, "IBE_CREATE_ORDER"](#), for more information.
- When a B2B recipient retrieves a cart by selecting the link in the e-mail notification, and then logs in to update the cart, the system will check that his current account number matches the one that the owner used when initially sharing the cart -- if these do not match, an error occurs.
- For B2C users, only the owner of the cart can track the order from Order Tracker. B2C recipients cannot track orders from shared carts.

12.3.8.2 Rules and Guidelines for Administrators

Following are some additional guidelines regarding administrators:

1. Actions that B2B cart administrators can perform in most cases do not apply to B2C cart administrators. For B2C users, only the cart *owner* has full permissions to perform actions with a shared cart. B2C cart administrators have lesser permissions than B2B cart administrators. See table, [Table 12-4, "Share Cart: Roles and Permissions"](#), for more information.

- 2. If a recipient administrator places an order with the cart, both he and the cart owner receive the order confirmation e-mail notification. All other recipients receive notification that they cannot access the cart any longer.
- 3. If a B2B recipient administrator places an order with the cart, he will be able to track the order. The B2B owner also will be able to track the order, provided:
 - The profile option, IBE: Use Auth Permissions in Order Tracker, is off; or
 - The profile option is on and the owner has the [IBE_VIEW_ORDER](#) permission in his user role.
- 4. For B2C users, only the owner can track the order from Order Tracker. B2C recipients cannot track orders from shared carts.

See [Section 12.3.7, "Requesting Assistance or Rejecting T&Cs with Shared Carts"](#), for information on this functionality for cart administrators.

12.3.8.3 Pricing and Payment Rules for All Shared Cart Users

The following table, [Table 12–5, "Pricing and Payment Rules for All Shared Cart Users"](#), describes pricing/payment modification activities and behavior for all users with shared carts.

Table 12–5 Pricing and Payment Rules for All Shared Cart Users

Cart Attribute	Modification Rule - B2B Users	Modification Rule - B2C Users
Sold-to customer and contact	Since a cart can only be shared within the organization, the sold-to customer will never change. The sold-to contact for a shared cart will always be the cart owner, even if a recipient places a shared cart as order.	Sold-to customer and contact is always the owner, even if a recipient places a shared cart as an order.
Cart Pricing	Prices are based on the sold-to customer	Cart prices are based on sold-to customer.
Promotion codes	During checkout, promotion codes are validated against the sold-to customer.	Promotion codes are validated against the sold-to customer.
Pricing agreements	During checkout, pricing agreements are validated against the sold-to customer.	n/a
Payment Information	During checkout, recipients can specify payment information from the payment book available to them. Payment information entered by recipients will not be linked to the cart owner	Recipients and owners can specify payment information from the payment book available to them. Payment information entered by recipients will not be linked/copied to the cart owner.

12.3.9 Quote Sharing

Quotes are available in the Customer UI under the My Quotes subtab within the Cart menu. The My Quotes summary page lists all of a user's quotes, including shared quotes. Quotes can originate from shopping carts that become quotes when a customer requests sales assistance or rejects T&Cs. Quotes also can be published to a customer through the quote publishing feature of Oracle Quoting.

See also: [Section 28.2, "Oracle iStore-Oracle Quoting Integration Overview"](#)

12.3.9.1 Shared Quote Behavior

Following are rules and guidelines for shared quotes:

1. Quotes have the same behavior as shopping carts in terms of member rules. However, quotes cannot be deleted.
2. If the profile option, IBE: Allow Update for Draft Quotes, is Yes, quotes can be updated and used as carts. If the profile is off, only payment type information can be changed. Even if the update quote feature is enabled, the quote must follow certain rules to users to be able to update it. See [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#), for more details.
3. In the My Quotes page, quotes are organized by type, with the most recently created quote appearing first in its section.
4. Just as with the My Carts page, the My Quotes page is different for B2C and B2B users.
5. Other rules apply to quotes as well. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.

See also:

- [Section 12.3.9.2, "Sharing a Quote"](#)
- [Section 12.3.9.3, "Retrieving a Shared Quote"](#)
- [Section 12.3.3, "Shared Cart Roles"](#)
- [Section 12.3.8, "Additional Rules and Guidelines for Shared Cart Members"](#)
- [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#)
- [Section F.8, "My Quotes Page Process Flow"](#)
- [Section F.9, "Update Quote Process Flow"](#)

12.3.9.2 Sharing a Quote

To share a quote, both B2B and B2C users press the Share Quote button from the Quote Details page. After the Share Quote button is pressed, the quote sharing process is identical to cart sharing.

12.3.9.3 Retrieving a Shared Quote

Retrieving a shared quotes is identical to retrieving a shared cart, except that the My Quotes page is used to access the quotes.

12.3.10 Implementing Shared Carts

Two profile options affect the shared cart functionality, as discussed in the following sections:

- [Section 12.3.10.1, "Setting the Cart Sharing Profile Option"](#)
- [Section 12.3.10.2, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option"](#)

12.3.10.1 Setting the Cart Sharing Profile Option

To enable shopping cart sharing, set the following profile option:

- **IBE: Use Share Cart Functionality** --- This profile option specifies whether cart sharing is enabled in your specialty sites. Set to Yes to enable the functionality. Set to No to disable the functionality. See [Section A.7.0.73, "IBE: Use Share Cart Functionality"](#).

12.3.10.2 Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option

For backward compatibility with the Sharee Number of previous Oracle iStore releases, you can set the following profile option to Yes to enable the Cart Retrieval Number textbox in the My Carts and My Quotes pages:

- **IBE: Cart Retrieval By Number For B2B** --- For B2B users, this profile option enables a textbox (labelled Cart Retrieval Number) in the My Carts and My Quotes pages. B2B users can enter a Sharee Number from previous iStore releases to access carts previously shared. See [Section A.7.0.25, "IBE: Cart Retrieval By Number For B2B"](#).

Note that this profile does **not** control the cart retrieval textbox for B2C users.

12.4 Checkout and Order Placement

Oracle iStore ships with full checkout and order placement capabilities in the Customer UI. This section discusses configurations for the checkout/order placement functionality.

Note: Some of the functionality in this section discussed requires integration with Oracle iStore dependencies and assumes you have performed the required setup tasks.

Main topics in this section include:

- [Section 12.4.1, "Checkout/Order Placement Process Flow"](#)
- [Section 12.4.2, "Shopping Cart Defaulting"](#)
- [Section 12.4.3, "Deleted \(Invalidated\) Addresses in Shopping Carts"](#)
- [Section 12.4.4, "Requesting Sales Assistance During Checkout"](#)
- [Section 12.4.5, "Rejecting Terms and Conditions During Checkout"](#)
- [Section 12.4.6, "Mandating B2B Contact Information During Checkout"](#)
- [Section 12.4.7, "How Account Sites Are Generated with Orders"](#)
- [Section 12.4.8, "Express Checkout"](#)

See also: [Section 12.5, "Orders Business Flow"](#), [Section 12.6, "Order Tracking"](#), [Section 12.7, "Order Cancellation"](#), and [Section 12.9, "Oracle iStore and Party/Account Merge"](#)

12.4.1 Checkout/Order Placement Process Flow

The following is the process flow for the Customer UI checkout phase:

1. The user presses the Checkout button from either the Saved (or Shared) Cart Details page or the Your Shopping Cart page. The Checkout: Shipping Information page displays.

Note that B2B users must have the [IBE_CHECKOUT](#) permission in their user roles to see the Checkout button.

2. In the Checkout: Shipping Information page, the user can perform the following shipping actions:
 - a. **Select a shipping method** --- If shipping methods have been implemented and assigned to the site, the user can select from available shipping methods using the Shipping Method drop-list. See [Chapter 11](#),

["Implementing Payment Types and Shipping Methods"](#), and [Chapter 4, "Implementation Tasks for Oracle iStore"](#), for setup information.

- b. Select a shipping address** --- B2C users select from a drop-list of existing addresses. B2B users will see Change buttons to change customer, contact, and address -- if they have the required permissions in their user roles. See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#).
 - c. Enter shipping instructions** --- If this functionality has been enabled, the user can enter Requested Delivery Date, Shipping Instructions, and Packing Instructions. See [Section 11.7.6, "Allowing Users to Enter Shipping Information"](#), for setup information.
 - d. Enter item-level shipping** --- If item-level shipping is enabled, the user can enter separate shipping methods for different items in the cart. See [Section 11.7.5, "Allowing Item Level Shipping Methods"](#), for setup information. Note that promotional goods, service items, and configurable items cannot be split with item-level shipping.
- 3.** After entering shipping information, the user selects the Continue Checkout button. The Checkout: Payment and Billing Information page displays.
- 4.** In the Checkout: Payment and Billing Information page, the user can:
 - a. Select payment type** --- In the *Payment Information* area, select from a list of available payment types, such as Credit Card, Invoice, etc. See [Chapter 11, "Implementing Payment Types and Shipping Methods"](#), and [Chapter 4, "Implementation Tasks for Oracle iStore"](#), for setup information.

If Commitments have been set up, the user can select the Use Commitment button to select commitments and their related Agreements. See [Section 10.5, "Pricing Agreements"](#), for more information.

- b. Select billing contacts and addresses** --- B2C users select from a drop-list of existing addresses. B2B users will see Change buttons to change customer, contact, and address -- if they have the required permissions in their user roles. See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#).
 - c. Specify tax-exempt status** --- In the *Tax Information* area, select whether the order is taxable. If the status of the organization is tax exempt, the user must select a reason from the Reason Code drop-list. A Tax Certification textbox in this area allows the user to enter a non-taxable certification number.

- See [Section 12.5, "Orders Business Flow"](#), for the post-order-placement flow. See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for a complete list of user permissions.

12.4.2 Shopping Cart Defaulting

In the Oracle iStore Customer UI, as the user goes through the checkout process, Oracle iStore defaults certain information into the users' checkout pages. This information includes shipping and billing information related to the user.

Shopping cart defaulting both improves the performance of the checkout flow, and improves the defaulting capabilities of Oracle iStore. The feature defaults in the shipping addresses, billing addresses, primary credit card, and preferred shipping method of the user when the user adds the first item to the cart.

The following are the triggers that activate cart defaulting:

- A signed-in user creates a cart by adding an item to it
- A guest user has items in an active cart and then signs in

12.4.2.1 Defaulting for Shipping Data

The following shipping fields are populated when shipping information defaulting occurs:

- **Shipping Method** --- If the user has a preferred shipping method and has a primary shipping address, then the preferred shipping method is defaulted into the cart. If the user does not have a preferred shipping method, then it can be set by the user within the Profile menu. The preferred shipping method also is set when a user who does not have a preferred shipping method checks out with his first cart and chooses a shipping method. This shipping method then becomes the user's preferred shipping method. In all cases, the existing validation of shipping methods per site, and those applicable for the current organization, will be done.
- **Ship to Customer** --- In a B2C case, the logged in person is always the default ship-to customer. In a B2B case, the organization of the logged-in user is the default ship-to customer.
- **Ship to Contact** --- In both B2C and B2B cases, the logged in user is the default ship to contact.
- **Ship to Address** --- If the user already has a default (preferred) shipping address, Oracle iStore will use that address as the default shipping address for the cart, provided the user also has a preferred shipping method. Otherwise, the user can create a new address in the checkout process. The address used in the first order placed by the user becomes the default ship-to address, and will be defaulted the next time.

12.4.2.2 Defaulting for Billing Data

The following billing fields are populated when billing information defaulting occurs:

- **Bill to Customer** --- In a B2C case, the logged in person is always the default bill-to customer. In a B2B case, the organization of the logged-in user is the default bill-to customer.
- **Bill to Contact** --- In both B2C and B2B cases, the logged in user is the default bill to contact.
- **Bill to Address** --- If the user already has a default (preferred) billing address in the address book, Oracle iStore will use that address. Otherwise, the user can create a new address during the checkout process. The bill-to address used in the first order placed by the user becomes default bill-to address, and will be defaulted the next time.
- **Payment Method** --- If the user has a default credit card and the merchant has set up that credit card type as a valid form of payment in the specialty site the user is in, then the default credit card is defaulted into the cart as the payment option when the user adds the first item to a new cart.

If this defaulting does not take place, then New Credit Card is displayed as the payment option on the billing and payment checkout page. If credit card is not enabled by the merchant as a payment type, then Invoice, Cash and Check (in this order) will be chosen, depending on which payment types have been enabled by the merchant. If the user does not have a default credit card in his profile and creates a new credit card, the new credit card is used in the checkout process and becomes the default credit card; this card then will be defaulted the next time.

12.4.3 Deleted (Invalidated) Addresses in Shopping Carts

Once a B2B or B2C user places a shipping or billing address into his shopping cart, Oracle iStore will keep these addresses in the cart even if these addresses get deleted (invalidated) before the user checks out with the cart. This ensures that users never are allowed to checkout without addresses in their shopping carts.

This rule applies to:

- B2C billing and shipping addresses
- B2B contact person billing and shipping addresses
- B2B party site addresses

- Addresses in shared shopping carts
- Addresses deleted through the user's Address Book (within the Profile menu)
- Addresses deleted through the Express Checkout preferences menu
- Addresses invalidated through Oracle Forms

The following shopping cart checkout flow examples illustrate the rule:

Standard Checkout:

1. A user add items to the cart and proceeds to checkout.
2. The user picks a shipping and a billing address to use in the cart.
3. The user switches to the Profile menu's Address Book and deletes the shipping and/or billing address used for the cart.
4. The user returns to checkout with the same cart -- the shipping and/or billing address continue to appear in the shipping and billing section cart-level settings.

Checkout with a Shared Cart:

1. A user adds items to the cart.
2. The user proceeds to checkout and shares the cart with another recipient.
3. The user picks a shipping and a billing address to use in the cart.
4. The user switches to the **Profile** menu's Address Book and deletes the shipping and/or billing address, and then logs out.
5. Recipient of the shared cart retrieves the cart and checks out with it -- the shipping and/or billing addresses continue to appear in the shipping and billing section cart-level settings.

Express Checkout:

1. A user enters shipping and billing address information in Express Checkout Preferences page.
2. The user places items in his shopping cart for automatic retrieval by the concurrent program.
3. The user goes to the Express Checkout Preferences page and deletes his express checkout billing and/or shipping address.
4. Express Checkout concurrent program submits the order with the previously-deleted shipping and/or billing addresses.

12.4.4 Requesting Sales Assistance During Checkout

If a user requests sales assistance in the checkout phase, the cart becomes a quote and the user's sales representative receives an e-mail notification of the request.

Note that a B2B user must have the [IBE_ASK_SALES_ASSISTANCE](#) permission in his user role to be able to request sales assistance.

This functionality requires that both Oracle Quoting and the Sales Assistance feature have been implemented. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), and [Section 14.2, "Sales Assistance"](#), for more information.

For information on who can request sales assistance with a shared cart or quote, see [Section 12.3, "Shopping Cart Sharing"](#).

12.4.5 Rejecting Terms and Conditions During Checkout

If a user rejects the standard Terms and Conditions (T&Cs) in the checkout phase, the cart becomes a quote in Oracle Quoting, if Oracle Quoting has been implemented.

In order to be able to reject T&C, a B2B user must have the [IBE_ASK_SALES_ASSISTANCE](#) permission in his user role, and the profile option which controls the sales assistance feature, IBE: Use Sales Assistance Feature, must be set to Yes. The cart becomes a quote and appears on the My Quotes page, Quotes list.

For more information, see [Section 30.2, "Using Terms and Conditions"](#), and [Section 14.2, "Sales Assistance"](#).

For information on who can reject Terms and Conditions with a shared cart or quote, see [Section 12.3, "Shopping Cart Sharing"](#).

12.4.6 Mandating B2B Contact Information During Checkout

Merchants have the ability to mandate whether B2B users must enter ship to and bill to contact information during checkout. Oracle iStore APIs validate this information against database tables used by Oracle Receivables.

This functionality is enabled by setting the following profile option at the application level for iStore:

- **IBE: Mandate Contacts For Billing and Shipping** --- Enter Yes to mandate that B2B users enter contact information before an order will be submitted. Enter No to disable the mandate.

This profile option defaults to No if not set.

A warning message is displayed if the user attempts to continue without providing the required information. The user cannot continue without providing the required information.

Note: B2B users must have the permission, IBE_CHANGE_BILLTO_CONTACT and IBE_CHANGE_SHIPTO_CONTACT, in their user role in order for them to be able to change ship to and bill to contact information.

12.4.7 How Account Sites Are Generated with Orders

At order creation, Order Capture (iStore's backend API layer) will create a valid account site use for the given party site and account number, if none exists. During this process, if the Oracle Receivables (AR) system parameter `auto_site_numbering` is No, then the location field when creating an account site use will be concatenated with the site use code, city, and account site use id. If the AR system parameter `auto_site_numbering` is Yes, then Order Capture APIs (which Oracle iStore uses to pass information to AR) will not populate the field, but instead will let AR generate the value for the Location field (to be the same as the account site use id).

12.4.8 Express Checkout

Available for all registered users, Express Checkout allows orders to be submitted as batch jobs by using a concurrent program, iStore - Express Checkout Order Submission. In addition to the concurrent program, the functionality is enabled by setting two profile options.

Topics in this section include:

- [Section 12.4.8.1, "Express Checkout Process Flow"](#)
- [Section 12.4.8.2, "Setting Express Checkout Profile Options"](#).

See [Section B.4.1, "iStore - Express Checkout Order Submission"](#), for more information on the concurrent program.

Note: If you are integrating Oracle iStore with Oracle9iAS Web Cache, and you are using the web cache to cache your catalog pages, you should not use Express Checkout in your specialty sites for the following reason:

If you set up Oracle9iAS Web Cache to cache your catalog pages and the Express Checkout profile is on at the application level: then, if User 1 has Express Checkout turned on, while User 2 has Express Checkout turned off, User 2 may still be able to see the Express Checkout button in the UI. When User 2 selects the cached Express Checkout button, he will receive an error.

12.4.8.1 Express Checkout Process Flow

Note that a B2B user must have the [IBE_CHECKOUT](#) and [IBE_CREATE_ORDER](#) permissions in his user role to use Express Checkout.

Following is the process flow for Express Checkout:

1. In Oracle Forms, an administrator sets the profile options discussed in [Section 12.4.8.2, "Setting Express Checkout Profile Options"](#).
2. In the Oracle iStore Customer UI, the Express Checkout preferences link appears in the Welcome bin, and the Express Checkout Preferences page is available through the Profile menu.
3. Oracle iStore user sets up Express Checkout preferences:

The user enters a valid credit card number and contact information in Express Checkout Preferences page, and saves the data. The system checks for valid addresses and credit card information before saving the settings. An error message is returned if the user has entered invalid information.
4. User enables Express Checkout in the Express Checkout Preferences page.
5. Once the user preferences are set up and Express Checkout is enabled, to purchase items through Express Checkout, the user does the following:
 - a. Selects the Express Checkout button that appears next to products in the specialty site catalog pages. This adds the item to the Express Checkout queue.

Note: Express Checkout does not apply to model bundles that have been enabled in Oracle Bills of Material; hence, the Express Checkout button will not appear next to these items.
 - b. Select the Express Checkout button in the Your Shopping Cart page. This adds all items in the cart to the Express Checkout queue.

Note that any time a user changes Express Checkout preferences, subsequent Express Checkout items will be added to a new queue. For example, if a user selects Express Checkout, changes Express Checkout preferences, and then selects Express Checkout again, the items submitted after he changed preferences will be entered into a separate Express Checkout order.

6. The site then forwards the user to the Pending Express Checkout Orders page where he can cancel the order if desired. If he does nothing, the concurrent program will pick up the order and submit it.

7. The concurrent program, [iStore - Express Checkout Order Submission](#), automatically picks up the Express Checkout queue and submits the orders.

12.4.8.2 Setting Express Checkout Profile Options

To use Express Checkout in your web sites, set the following profile options at the application level to iStore.

- **IBE: Use Express Checkout** --- This profile option enables the Express Checkout functionality in all of your sites. Set to Yes to enable Express Checkout, or set to No to disable the functionality. The default value is Yes.
- **IBE: Express Checkout Consolidation Time Interval** --- This profile option determines the amount of time that an Express Checkout order will remain available to be "added to" before the concurrent program can submit it. The concurrent request, iStore - Express Checkout Order Submission, attempts to submit Express Checkout orders based upon its schedule, e.g., how often the concurrent request is set to be run (every *n* hours, every day, etc.).

Enter values for this profile option in *minutes*. The default value for this profile option is 60 (minutes).

See [Section B.4.1, "iStore - Express Checkout Order Submission"](#) for more information on the concurrent program.

12.5 Orders Business Flow

The orders flow is as follows

1. An order is placed in a web site when the user selects the Place Order button.
Note that B2B users must have the [IBE_CREATE_ORDER](#) permission in their user roles to see the Place Order button.
2. If the order uses standard checkout, Oracle Order Capture APIs send order data to Oracle Order Management. (Submit_Quote API passes carts to the Create_Order API, which books the order in OM.) The default order state (Booked or Entered) is determined by the profile option, ASO: Default Order State.
 - **Booked** orders are ready to move to the next stage in the order process (for example, shipping). Booked orders cannot be deleted or modified (although quantity can be changed) by a sales representative. In addition, a sales representative cannot do a line-level return for a Booked order.
 - **Entered** orders must then move to the Booked stage before completion.

3. If the order is placed using Express Checkout, the iStore Express Checkout Order Submission concurrent program loads the order data into the Oracle Order Management tables.
 - See [Section 12.4.8, "Express Checkout"](#), for details.
4. The order is then processed through OM, Oracle Shipping, and Oracle Receivables.
5. Users can view the order details --- including shipping, invoice, and payment information --- using the Order Tracker functionality in the web sites.
 - See [Section 12.6, "Order Tracking"](#), for details on Order Tracker.
 - For more information, see the following documentation available on [OracleMetaLink](#).
 - *Oracle Order Management Suite Implementation Manual* for additional information on how orders are processed in Order Management
 - *Order Capture API Reference Guide* for information on APIs that send and retrieve orders information
 - Oracle Financials documentation for more information on Oracle Receivables

12.6 Order Tracking

Once an order is submitted in an Oracle iStore site, customers can log into the site and access their order details (including invoices, payments, shipping, and returns) in Order Tracker, if the administrator has enabled this functionality.

Topics in this section include:

- [Section 12.6.1, "Order Tracker Overview"](#)
- [Section 12.6.2, "Permission Checking in Order Tracker"](#)
- [Section 12.6.3, "Setting Number of Invoice/Order Lines to Display"](#)
- [Section 12.6.4, "Invoice Details in Order Tracker"](#)
- [Section 12.6.5, "Payment Details in Order Tracker"](#)
- [Section 12.6.6, "Shipping Details in Order Tracker"](#)
- [Section 12.6.7, "Configured Items in Order Tracker"](#)
- [Section 12.6.8, "Order Tracker Hook for Shipping Lines"](#)

- [Section 12.6.9, "Changing Order Tracker Column Attributes"](#)

See also:

- [Section 12.6.1.1, "Searching in Order Tracker"](#)
- [Section 12.7, "Order Cancellation"](#)
- [Section 12.8, "Order Returns"](#)

12.6.1 Order Tracker Overview

In the Customer UI, Order Tracker is available to registered users through the Orders icon.

The Order Tracker section consists of the following subtabs:

- **Track Orders** --- See [Section 12.6.1.2, "Track Orders Subtab"](#)
- **Pending Express Checkout** --- See [Section 12.6.1.3, "Pending Express Checkout Subtab"](#)
- **Invoices** --- See [Section 12.6.1.4, "Invoices Subtab"](#)
- **Payments** --- See [Section 12.6.1.5, "Payments Subtab"](#)
- **Returns** -- See [Section 12.8, "Order Returns"](#)

Note that the specific functionality must be implemented for the relevant subtab to appear.

12.6.1.1 Searching in Order Tracker

In the Order Tracker subtabs, users can search for orders, invoices, payments, and return orders using the following search options:

- From **<Orders, Invoices, Payments, Returns> in last** menu, select 7 days or as appropriate
- In the **<Orders, Invoices, Payments, Returns> between** field, select the appropriate from and to dates
- In the **Search By** field, select appropriate values; different search by fields are available whether the user is searching for orders, invoices, payments, or returns.

The values in the search mechanism are values derived from an Oracle Applications lookup. You can change these values, if desired. For details about the related text

message and default search values, see [Section 15.6.6, "Order Tracker Search Lookup"](#).

Note: The default search for the search utility is derived from the first value specified in the Oracle Applications lookup. By default, this first value is 7.

After searching, the user presses Go to engage the search, and Oracle iStore displays the relevant orders depending on the search criteria specified by the user.

12.6.1.2 Track Orders Subtab

The Track Orders page -- accessible as a subtab in the Orders menu -- contains a list of submitted orders. Depending upon their permissions and profile options setting, B2B users may see all orders placed within their organization; see [Section C.6.0.33, "IBE_VIEW_ORDER"](#).

The Track Orders page contains a search mechanism which is described in [Section 12.6.1.1, "Searching in Order Tracker"](#).

Order Details

The Order Details page is available by selecting the Order Number hyperlink in the Order Number column. The Order Details page displays:

- Reference numbers for the order, including order number, and reference number
- Purchase Order number, if applicable, at the order and item level. (Oracle iStore does not support adding P.O. numbers at the item level, but Oracle Order Management does.)
- Customer Name -- This will be the organization name for B2B users
- Amounts for subtotal, charges (taxes, shipping), and total of the order
- Shipping method, including ship method and shipment priority (at the order level and item level)
- Payment terms
- Pricing agreements, including total amounts, total charges, tax total, and order total (at the cart level and item level). Note that if a B2B user does not have the [IBE_VIEW_NET_PRICE](#) permission in his user role, he will not see any discounts or agreements data.
- Freight terms
- Date ordered and date booked

- Order Status (Entered, Booked, Cancelled, or Closed)
- Line status applicable to each order line (Awaiting Shipping, Awaiting Return, Booked, Cancelled, Closed, Entered, etc.)
- Payment type
- Hyperlink to shipping details
- Part numbers and names of products ordered
- Quantities ordered
- Unit selling prices of products ordered
- Units of measure for products ordered
- Monetary totals by line item
- Related Returns -- See [Section 12.8.6, "Tracking Returns"](#)
- Item Details icon --- Selecting the Item Details icon will display the following information for both B2B and B2C users:
 - Requested Billing Details:
 - Bill-to contact and address for the order line
 - Invoice Number for the order line
 - Payment Terms, Agreement and Commitment information for the order line
 - Purchase Order number for this order line
 - Requested Shipping Details: (Only if the item is shippable)
 - Ship-to contact and address for this order line
 - Shipping Method, Delivery Date, Freight terms, Shipping Instructions, Packaging Instructions, Scheduled Ship Date
 - In addition, if the item is shippable and has been shipped, then the actual shipping information is displayed, including: Tracking Number, Quantity Shipped, Actual Ship Method, and Actual Ship Date.

See also: [Section 12.6.7, "Configured Items in Order Tracker"](#) and [Section 12.6.6, "Shipping Details in Order Tracker"](#)

12.6.1.3 Pending Express Checkout Subtab

If Express Checkout is enabled, users will see the details of their express checkout orders. See [Section 12.4.8, "Express Checkout"](#), for more details.

12.6.1.4 Invoices Subtab

If view invoices functionality is enabled, users can search for invoices by Invoice Date, Invoice Number, PO Number, and Invoice Type. Results are returned in table format in the Invoices page. Note that if a B2B user does not have the [IBE_VIEW_NET_PRICE](#) permission in his user role, he will not see any amount details for Invoices.

See [Section 12.6.4, "Invoice Details in Order Tracker"](#), for information on disabling the view of invoices.

12.6.1.5 Payments Subtab

If view payments functionality is enabled, users can search for payments by Payment Number, Customer Name, Receipt Date, Payment Type, and Payment Amount. Results are returned in table format in the Payments page. Note that if a B2B user does not have the [IBE_VIEW_NET_PRICE](#) permission in his user role, he will not see any amount details for Payments.

See [Section 12.6.5, "Payment Details in Order Tracker"](#), for information on disabling the view of payments.

12.6.2 Permission Checking in Order Tracker

You can control whether Oracle iStore checks user permissions in the Order Tracker pages by setting the profile option, IBE: Use Auth Permissions in Order Tracker. See [Section A.7.0.53, "IBE: Use Auth Permissions in Order Tracker"](#), for more information.

12.6.3 Setting Number of Invoice/Order Lines to Display

The number of rows to display in Order Tracker when users view their orders, invoice, payment, or returns data is controlled by setting the profile option, IBE: Number of Invoice/Order Lines Displayed. See [Section A.7.0.44, "IBE: Number of Invoice/Order Lines Displayed"](#), for more information.

12.6.4 Invoice Details in Order Tracker

By default, an Invoices subtab displays in the Customer UI in Order Tracker. The link can be disabled, however, by setting the profile option, IBE: Enable Invoices in Order Tracker. See [Section A.7.0.28, "IBE: Enable Invoices in Order Tracker"](#), for more information.

12.6.5 Payment Details in Order Tracker

By default, a Payments subtab displays in the Customer UI in Order Tracker. The subtab can be disabled, however, by setting the profile option, IBE: Enable Payments in Order Tracker. See [Section A.7.0.32, "IBE: Enable Payments in Order Tracker"](#), for more information.

12.6.6 Shipping Details in Order Tracker

In the Order Tracker pages in the Customer UI, both B2B and B2C users can view shipping information for their orders, providing the related shipping functionality has been implemented.

When an order line is booked, a Delivery Line is created for each of the lines in Oracle Shipping, followed by the running of the Pick Release program. Once Pick Release is completed successfully, the order lines in status, Awaiting Shipping, and release statuses, change to Picked/Staged. Later, the items are packaged and put into deliveries. Deliveries are assigned to trips, and finally ship confirm is performed.

Out-of-the-box, in the Shipment Details page Oracle iStore displays, at item level, relevant shipping information, including:

- Delivery information at the order header and order line levels. One order can have multiple deliveries and one delivery can have order lines from different orders. Note only shippable items data is shown.
- Item and quantity information for the items shipped
- Shipment number, which is a drill-down hyperlink leading to the shipping details. Note that other applications, such as Oracle Order Management, refer to the shipment number field as "delivery".
- Shipping status of each item
- Shipping carrier for each item
- Tracking number relating to the shipping carrier, if available

Note the following about the display of shipping details and statuses:

Note that Oracle iStore displays order line status for shipping lines (from OE_ORDER_LINES table), not, delivery status, as Oracle Order Management does (from WSH_DELIVERY_DETAILS table).

- Possible statuses for item shipping could be Not Shipped, Awaiting Shipping and Shipped.
- In Oracle Shipping, if the order line has been picked and assigned to a delivery, then Oracle iStore displays statuses like Awaiting Shipping, Shipped, etc. If the order line has not been assigned to a delivery, then Oracle iStore displays Not Shipped for these lines. Values in columns other than Part Number and Item will be blank when the shipment status is Not Shipped.

To view shipping information at the order level, the user navigates to shipping details via one of the following navigation paths:

- Orders > Track Orders > select Shipment Details icon for an order
- Orders > Track Orders > view Order Details > select Details link for Shipping field

Note that the shipping details link/icon will be disabled if the order is in either Entered or Cancelled status.

For information about the display of configured items (including kits, model bundles, PTO, and ATO items) see [Section 12.6.7, "Configured Items in Order Tracker"](#).

Customizable Shipping Information Hook

To enable you to extend shipping details (for example, to link to an carrier's website), Oracle iStore provides a customizable user hook. See [Section 12.6.8, "Order Tracker Hook for Shipping Lines"](#), below, for details.

12.6.7 Configured Items in Order Tracker

The Order Tracker display of configured items is described in the following sections: (Note that the term *configured item* is used for any item that has a parent item and subcomponents.)

- [Section 12.6.7.1, "General Display of All Configured Items"](#)
- [Section 12.6.7.2, "Assemble-to-Order Items"](#)
- [Section 12.6.7.3, "Pick-to-Order and Kit Items"](#)

- [Section 12.6.7.4, "Model Bundles"](#)

The following descriptions apply to the display of these items in the Track Orders, Order Details, Shipment Details, and Item Details pages.

12.6.7.1 General Display of All Configured Items

In the Order Details and Shipment Details pages, parent items are shown without any indentation, while the child items display under the parent, indented slightly. In addition, a thick line separates parent items from each other in the table.

12.6.7.2 Assemble-to-Order Items

Oracle iStore shows assemble-to-order (ATO) model items and all components. Following are additional details:

- After assembly, a new "config" line is created for the ATO. In the Order Details page, this config line displays below the ATO Model line, if the config line is created. If the config line is not created in assembly, then only the ATO model is shown.
- Shipping Information:
 - An ATO model and all its components will have identical requested shipping information, as specified by the customer. The model and its components cannot be shipped individually. Internally, they must be assembled and shipped as a single assembly (config line).
 - In Oracle iStore, requested shipping information is displayed for the ATO model item.
 - Actual shipping information will be available only against the new config line assembly created. Further, the actual shipping information table will be displayed, if the shipment record exists for the config line.
- Billing Information:
 - Requested billing information can be viewed for the ATO Model and all its components.
 - The Item Details page does not show billing details for config line items, since the config line is a line generated during assembly.
- Any service item associated with the ATO model and its components will be shown under the serviceable item.

12.6.7.3 Pick-to-Order and Kit Items

Oracle iStore shows pick-to-order (PTO) model items or kit items with all components. Following are additional details:

- Each PTO/kit line item can have different billing information.
- If a PTO item or a component is shippable, then requested and actual shipping information displays for each of the lines.
- Oracle iStore shows kit items along with included items in the Order Detail page. Included items will be indented, and will show prices as zero, while the top kit item will have the item price.
- In the Item Details page, a kit item and its included items will show the customer entered billing and shipping data. If a kit item is also shippable, and the shipping record exists, Oracle iStore shows the actual shipping data, just as it does for standard items.
- In the Shipment Details page, Oracle iStore shows the kit item, included items, quantity shipped, shipment number, shipment status, ship method, and tracking number, just as it displays for components of configured items. If the kit item is shippable, then the above-mentioned columns will also be displayed for the top kit item. If any of the included items are non-shippable, those items are not displayed on this page. However, the kit item will always be shown, irrespective of whether the kit item is shippable or not (same logic as PTO model item).
- Included items are not displayed in Invoices and Payments pages; only kit items are displayed.
- Any service item associated with the model or its components will be shown under the serviceable item.

12.6.7.4 Model Bundles

Oracle iStore displays model bundles similarly to PTO and kit items. Following are additional details:

- All option classes in the bundle will be displayed.
- Any service item associated with the model bundle or its components will be shown under the serviceable item.

12.6.8 Order Tracker Hook for Shipping Lines

By implementing a region item in the Shipment Details page within Order Tracker, you can enable an extra column in the page which links to an additional processing page. Both pages are Oracle iStore Display Templates -- one is a detail template and one is a processing template. For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

In the processing template, you can insert custom logic to fulfill your organization's business requirements. For example, in the processing page you could provide additional shipment tracking mechanisms, such as a link to a carrier web site where users could track the shipment of their purchases.

Following are the implementation steps:

- [Step 1 - Enable Region Item in Shipment Details Page](#)
- [Step 2 - Customize Shipping Details Processing JSP](#)

12.6.8.1 Step 1 - Enable Region Item in Shipment Details Page

The region item, IBE_SD_ADDITIONAL, is disabled by default. After the region is enabled, a column, labelled Details, is automatically shown with a icon on the Shipment Details page.

Following are the steps to enable the region item:

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Choose Application Developer Common Modules.
3. From Navigator, choose Define Regions.
4. From the Region ID field, query for IBE_SHP_DTL_R.
5. Go to Region Items.
6. Scroll through the list and locate IBE_SD_ADDITIONAL.
7. Check Node Display to enable the region item. (Uncheck to disable.)
8. Save the changes.
9. Bounce the middle tier.

12.6.8.2 Step 2 - Customize Shipping Details Processing JSP

Next, customize the Shipping Details Custom Processing page with your own business logic.

Following are the details about this page and the main Shipping Details page:

Shipping Details Custom Processing Page:

The physical file for this page is an empty page, allowing you to provide your own content. The mapped physical file and Display Template information for the Shipping Details Custom Processing page are:

- **Physical file** --- ibeCOtpShpDtlCustom.jsp
- **Programmatic Access Name** --- STORE_SHIP_DETAIL_CUSTOM_P

Shipping Details Page:

The mapped physical file and Display Template information for the Shipping Details page are:

- **Physical file** --- ibeCOtdShpDtl.jsp
- **Programmatic Access Name** --- STORE_PSI_SHIPMENT_DETAIL_D

Programmatically, the Shipping Details page table is constructed in a loop iterating through all region items. Each column is essentially a region item. Inside this loop, the URL to the Shipping Details custom processing page template is constructed. You can pass additional information to the destination by appending parameters to the URL (detailsURL). For example, you could provide information such as tracking numbers and shipping carriers. Such information can simply be stored in a variable to be used later.

For example:

```
else if (itemName.equals("IBE_SD_ADDITIONAL"))
{
String tplName = "STORE_SHIP_DETAIL_CUSTOM_P";
// You can append parameters to detailsURL to pass additional information
// to the processing page.
String detailsURL =
DisplayManager.getTemplate(tplName).getFileName();
%>
<td class="tableDataCell" valign="top" align="left">
<a href="<%= detailsURL %>">

</a>
</td>
```

```
<%  
}
```

For sample code, see the Shipping Details Custom Processing page physical file (ibeCOtpShpDtlCustom.jsp). The sample code shows how to retrieve the parameter and process it. At the end of the page, the code simply redirects to Order Tracker; however, you can customize it to redirect to any page you want.

12.6.9 Changing Order Tracker Column Attributes

The columns that display in Order Tracker are retrieved from Oracle Applications AK Region attributes. Oracle iStore supports changing the AK Region Item attributes for the attributes listed in the following table, [Table 12–6, "Order Tracker AK Regions"](#), for the region, IBE_ORD_SUM_R.

Note that region items can have a number of properties associated to them, for example, attribute type, attribute name, sequence, display length, long label, etc. However, Oracle iStore uses only some of these properties (the ones shown in the following table). If a property that is not used by Oracle iStore is changed, there will be no impact to the Order Tracker pages. The following table lists the region item properties used by Oracle iStore. All other properties are not used.

Table 12–6 Order Tracker AK Regions

Property	Purpose
Sequence	Used to determine the sequence in which the HTML table columns corresponding to the region items are rendered. This can be changed by the merchant to display the Order Tracker columns in the desired order.
Node Display checkbox	Used to find out if a region item is intended for display. If it is not, then the column that maps to the region item is not displayed. This can be used by the merchant to selectively turn off the display of columns. For example, on the order summary page, if the Customer Name column is not required to be shown, the merchant can turn off the node display flag for that region item in the region, IBE_ORD_SUM_R.

Table 12–6 Order Tracker AK Regions

Property	Purpose
Queryable checkbox	Used to determine the columns that can be queried on. These columns are then shown in the search drop-down list. For example, on the order summary page, if the Customer Name needs to appear as a field on which the users can query, then this can be accomplished by making the corresponding region item in the region, IBE_ORD_SUM_R, to be queryable.
Display Length	Controls the display length for VARCHAR2 fields in the pages. If merchants customize their pages to reduce the Display Length, for example, for Item Description, from 240 to 80 characters, then Order Tracker would truncate the database value to 80 characters and display only 80 characters.
Long Label	Used to retrieve the column headings for the columns shown in the HTML table on each Order Tracker page. This can be changed by merchants who have a need to display their own headings.

12.6.9.1 Steps to Modify Column Attributes

You may use the following quick-steps to modify column attributes in IBE_ORD_SUM_R region. For more information, see the *Oracle Self-Service Web Applications Implementation Manual* (Web Applications Dictionary chapter).

Steps

1. Log into Oracle Forms with Application Developer Common Modules responsibility and navigate to Define Regions > Find Regions window.
2. Find IBE_ORD_SUM_R region.
3. Edit the Region Items form for the region.
4. In the list of region items/attributes within IBE_ORD_SUM_R region, find the region item/attribute to be changed.
5. Edit the attributes shown in the table above as desired.
6. Save your changes.
7. Bounce the application server.

12.7 Order Cancellation

Oracle iStore allows B2B and B2C users to cancel orders that they have placed in the Customer UI, if the orders are in Booked or Entered status in Oracle Order Management. B2B customers also can cancel orders across organizations.

See the following sections for more information:

- [Section 12.7.1, "Order Cancellation Process Flow"](#)
- [Section 12.7.2, "Implementing Order Cancellation"](#)

12.7.1 Order Cancellation Process Flow

The process flow for order cancellation is as follows:

1. A user accesses the Order Summary or Order Details pages, and initiates the order cancellation process by selecting the Cancel Order button.

Note: The Cancel Order button displays in the Customer UI only if the profile option, IBE: Enable Order Cancellation in Order Tracker, has been set to Yes, and the order is cancellable (in Entered or Booked status). In addition, B2B users who do not have the [IBE_CANCEL_ORDER](#) permission will be unable to access the button. B2B users with the [IBE_CANCEL_ORGANIZATION_ORDER](#) permission can cancel orders across operating units for their organization.

Users who have enabled Express Checkout will be able to cancel Express Checkout orders before they are submitted to Order Management. See [Section 12.4.8.1, "Express Checkout Process Flow"](#), for details.

2. Once a user initiates the cancellation request, the system checks to see if the order is cancellable. If it is, the user is taken to the Order Cancellation page.

If the order is not cancellable, the cancellation process is aborted and a message is presented to the user which informs him that the order is not cancellable online and to contact his sales representative.
3. In the Order Cancellation page, the user is prompted to select a Cancellation Reason from a drop-list.
4. Once the cancellation request is submitted and accepted, a confirmation message displays on the UI.
5. Oracle iStore sends the Cancel Order e-mail to the user confirming that the order has been cancelled.

12.7.2 Implementing Order Cancellation

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. See the following sections for more information:

- [Section 12.7.2.1, "Set Cancel Order Profile Option"](#)
- [Section 12.7.2.2, "Verify B2B User Permissions"](#)

12.7.2.1 Set Cancel Order Profile Option

To enable the cancel order feature, set the profile option, IBE: Enable Order Cancellation in Order Tracker, to Yes. See [Section A.7.0.30, "IBE: Enable Order Cancellation in Order Tracker"](#), for additional details about this profile option.

12.7.2.2 Verify B2B User Permissions

Verify that the B2B users registering in your sites have the permission, [IBE_CANCEL_ORDER](#), in their user roles. Without this, the Cancel Order button will not display.

Oracle iStore also allows B2B users to view and cancel orders for their current session operating unit and other operating units within their organization. To enable this ability, assign their role the permission, [IBE_CANCEL_ORGANIZATION_ORDER](#).

12.8 Order Returns

Oracle iStore's Returns feature allows both B2B and B2C users to return items from orders placed. This section discusses the Returns feature in the following topics:

- [Section 12.8.1, "Returns Overview"](#)
- [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#)
- [Section 12.8.3, "Validations Performed in Returns Process"](#)
- [Section 12.8.4, "Pending Returns Queue"](#)
- [Section 12.8.5, "Returns Process Flows"](#)
- [Section 12.8.6, "Tracking Returns"](#)
- [Section 12.8.7, "Rules and Guidelines for Returns"](#)
- [Section 12.8.8, "Implementing Returns"](#)

Note: This section covers returns processes and implementation tasks related directly to Oracle iStore. For information on setting up integrating applications, refer to the appropriate product documentation.

12.8.1 Returns Overview

In today's e-commerce environment, accepting return items in web stores is standard functionality. Providing returns functionality both reduces the cost of doing business for merchants, and provides an invaluable step toward a complete customer self-service orientation.

To address this business requirement, Oracle iStore provides Returns functionality in the Customer UI. Using the Orders menu in the Customer UI, customers can initiate returns for orders which are in Booked status in Oracle Order Management. If an approval process is being used, an administrator can use Oracle Order Management to evaluate the returns, and either approve or reject the returns. Merchants can set up returns with or without Oracle Workflow approval mechanisms in place.

The following is a high-level Returns flow:

1. To initiate a return (also known as a Return Material Authorization, or RMA), customers select applicable items, specifying the return quantities and return reasons.
2. After the customer submits the RMA, Oracle iStore automatically sends a confirmation e-mail notification to the customer.
3. Once Oracle Order Management processes the return order, the appropriate e-mail notification is sent to the user, notifying him whether the RMA has been approved or not (if approvals are being used). For approved RMAs, merchants can set up a return location to be sent in the e-mail notification.
4. After an RMA is approved, on the back end, Oracle Purchasing and Oracle Accounts Receivable work to complete the RMA processing, by fulfilling the order lines and generating credit memos.
5. RMAs are then available for the customer to track in Order Tracker.

12.8.2 Returns Functionality With and Without OM Release 11.5.10

This section discusses important differences in the returns functionality provided through Oracle iStore if you are using Oracle Order Management Release 11.5.10 versus earlier releases.

See also: [Section 12.8.8, "Implementing Returns"](#)

12.8.2.1 Without Oracle Order Management Release 11.5.10

1. Merchants cannot implement pre-booking approval processes for returns.
2. The status of pending returns is Entered. Return orders in Entered status are always part of a user's pending returns queue. These cannot be tracked as submitted orders in the Returns pages.
3. The status of submitted returns is Booked.
4. Any errors from validations being done from Oracle iStore will show up in the Oracle iStore UI only after the user presses the Submit Return button. Additionally, the error messages that display are less detailed than Release 11.5.10 versions of Oracle Order Management. See [Section 12.8.3, "Validations Performed in Returns Process"](#), for more information.
5. E-mail notifications support --- When a customer submits a return, the return is immediately Booked and the user receives a confirmation e-mail from Oracle iStore giving him details of the return-order, with a note, "A return order has been created. You will shortly receive an e-mail confirmation for approval of the return items with the return location."

Merchants can customize the Oracle Order Management workflows to hard-code the return location in the workflow message.

12.8.2.2 With Oracle Order Management Release 11.5.10

1. Merchants can implement pre-booking approval processes for returns.
2. The status of pending returns is User Working (regardless of whether pre-booking approval processes are being used). Return orders in Entered/User Working status are always part of a user's pending returns queue. These cannot be tracked as submitted orders in the Returns pages.
3. When the user submits the return (clicks Submit Return button):
 - a. If an Approval List has been set up in Order Management:
 - Order status moves from User Working to Pending Internal Approval
 - User will be able to see the returns in Pending Internal Approval status in the Returns subtab
 - Based on the approver's action, the return then moves to Booked or Rejected status.

- b. If an Approval List has not been set up in Order Management, then the order status moves to Booked status.
- 4. Any errors from validations being done from Oracle iStore will show up in the Oracle iStore UI after the user adds the items to the return order (in the Create Return: Review and Submit page), prior to submission. Additionally, the error messages that display are more detailed than pre-Release 11.5.10 versions of Oracle Order Management. See [Section 12.8.3, "Validations Performed in Returns Process"](#), for more information.
- 5. E-mail notifications support --- Since Oracle iStore return orders are created with a transaction type having an order flow of "Order Flow - Return with Submission and Approval", when a return is Booked (irrespective of whether approval is setup or not), Oracle Order Management calls Oracle iStore to send an approval or rejection notification to the customer. Oracle iStore seeds two notifications for this purpose: Return Order Approval and Return Order Rejection. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for details.

Note: If you are using Oracle iStore Release 11.5.10 with Oracle Order Management Release 11.5.10, set the profile option, IBE: Enable Return Pre-booking Approval, to enable the pre-booking approval process in Oracle Order Management. See [Section 12.8.8.1, "Step 1 - Set Profile Options"](#), and [Section A.7.0.33, "IBE: Enable Return Pre-booking Approval"](#), for details.

12.8.3 Validations Performed in Returns Process

Oracle iStore performs several validations during the returns process. The stage at which errors display from validation failures and the detail to which error messages display depend upon whether the pre-booking approval feature is enabled and which Oracle Order Management version is installed. See [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#), for details. Also see the Oracle Order Management product documentation.

See also: [Section 12.8.7, "Rules and Guidelines for Returns"](#)

Note: The detailed error messages described here apply to implementations running Release 11.5.10 and later versions of Oracle Order Management, with the pre-booking approval feature enabled. For pre-Release 11.5.10 versions, a generic error message is displayed instead; no part number, error number, etc., will display.

- 1. **Quantity validations** --- Oracle iStore does a validation check for returned quantity, to ensure that the quantity returned does not exceed the quantity ordered. In the submission process, Oracle iStore also checks that a quantity of

zero has not been submitted. Lines that fail the quantity validation test show an error icon beside them, and an error message will display.

- a. If the quantity validation fails for standard items (i.e., items which are not model bundles or configured items), an error message with part number, order number and returnable quantity is displayed, with an error icon near the Quantity field.
- b. If the quantity validation fails for model bundles and configured items, a less detailed error message displays; this message shows no returnable quantity, but does have part number, order number, and an error icon near the Quantity field. Users cannot return components of a model -- only the entire model is returnable.

Note: For a model item, if an individual component has already been returned (allowed through Order Management), the quantity of the returned component is considered in the validations.

2. **Contact validations** --- Oracle iStore confirms contact information of the customer.
 - a. For B2B users, the lines which fail for contact display an error icon next to the billing icon. If the user selects the icon, *Invalid Contact and Address* are displayed.
 - b. For B2C users, Oracle iStore verifies that all of the return lines have the same bill-to address. For errors, the error icon is displayed next to the Address drop-list.
3. **Organization, currency and account validations** --- Before submitting pending returns with the current return, Oracle iStore validates that the pending returns have the same organization, currency, and account number as those retrieved for the current user's session.
4. **Item Returnable flag validation** --- Oracle iStore checks that items are returnable.

12.8.4 Pending Returns Queue

Pending returns are return items that have been previously selected by a user and added to the pending returns queue by navigating with the items to the Create Return: Review and Submit page. Pending return items have been Entered -- but not yet submitted -- into Oracle Order Management. After submission, the items are no longer part of the pending returns queue.

Return orders in Entered status are always part of a user's pending returns queue. Note that there will always be only one pending return queue per user at a time.

If a pending returns queue doesn't exist, Oracle iStore creates one. If the queue does exist and the user adds an identical item from the same order line, the item is not re-added to the queue. Instead, only the return quantity on the existing return line is incremented by the new return quantity specified by the user. The return reason is retained for the existing return line.

If items are available in the queue, a Pending Returns section will display on the following pages:

- Create Return: Select Items (single-order flow)
- Create Return: Search and Select Items (multiple-order flow)
- Create Return: Review and Submit -- This page is accessible by selecting Next on the above two pages, or by navigating to the Returns tab > Pending Return button. If no pending returns are in the queue, the pending returns button will not display. Users can cancel pending returns by navigating to this page.

12.8.5 Returns Process Flows

Merchants can set up returns with or without Oracle Workflow approval mechanisms. These mechanisms allow -- via automatically generated e-mails and associated processes owned by Oracle Order Management -- one or more people to approve or reject an RMA after the customer submits it, but before it is booked into Oracle Order Management. Functionality provided depends upon the Oracle Order Management version installed -- approvals are not available in pre-Release 11.5.10 versions of the order management system.

In addition, the Oracle Order Management version installed determines at what stage Oracle iStore validation errors display, the detail level of the errors, and the status of the returns after submission. See [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#), for information.

This section contains:

- [Section 12.8.5.1, "Single-Order Return Flow"](#)
- [Section 12.8.5.2, "Multiple-Order Return Flow"](#)

12.8.5.1 Single-Order Return Flow

The returns process flow for returning a single order is as follows:

1. A customer logs into a site and selects the Orders button to access the Track Orders page.
2. The customer selects an order number to access the Order Details page.
3. The customer selects the Return Items button to access the Create Return: Select Items page. The Return Items button only displays if the profile option, IBE: Use Returns, is set to Yes, and -- for B2B users -- if the user has the [IBE_CREATE_RETURN](#) permission in his user role.

The Create Return: Select Items page shows items from the order just selected, with a zero quantity for each returnable item, and any pending returns.

4. In the Create Return: Select Items page, for each item in the order that the user is returning, he selects a return reason and enters a return quantity. A different reason and quantity can be specified for each item. Items which are not returnable will not have updateable Quantity or Return Reason fields, and the Returnable column will display No. Note that return reasons can be changed; see [Section 12.8.8.7, "Step 7 - Customize Returns Lookups"](#).

Note: If a return policy has been implemented, processing constraints set up in Oracle Order Management will determine whether or not the order line can be returned. See [Section 12.8.8.5, "Step 5 - Set up Returns Policy"](#).

5. The customer selects Next to continue the returns process.
6. The Create Return: Review and Submit page appears. At this point, the items are in the pending returns queue. Items that already existed in the queue also are pulled into the page. See [Section 12.8.4, "Pending Returns Queue"](#), for more information.
 - For quantity of each item, Oracle iStore defaults differently in a single-order flow versus a multiple-order flow:

Single-order flow --- The application uses the quantity specified by the user in the previous screen. Oracle iStore will only pick up returnable items with a quantity greater than zero.

Multiple-order flow --- The quantity is defaulted from the original order, and the user can change the quantity.
 - If an identical item *from the same order* already exists in the Pending Return queue, the quantities are merged, so that the new quantity reflects the additional product(s).
7. In the Create Return: Review and Submit page, the customer can:

- Cancel the return order -- This deletes the return order from the data tables, which is different from canceling an order.
 - Change bill to address -- See [Section 12.8.7.5, "Customers, Contacts, and Addresses Rules and Guidelines"](#).
 - Add items to the return order.
 - Remove items from the return order; when the last item from a return order is removed, the return order is deleted.
 - View details of the order in which this item was purchased.
 - Change return reasons. Note that return reasons lookups can be changed; see [Section 12.8.8.7, "Step 7 - Customize Returns Lookups"](#).
 - Change quantities -- In this case, the user should press the Recalculate button to recalculate totals.
 - Recalculate the return total, including line total, taxes, and return fees.
 - View related charges -- If applicable, these are return fees as setup by the merchant to return the goods; value is calculated by the Pricing Engine.
 - Submit the return
 - Navigate to other areas of the Customer UI -- When the customer does this, leaving the Create Return: Review and Submit page, the return becomes part of the pending returns queue. He can return to the Returns tab > Pending Returns button to re-access this page.
8. The customer selects Submit Return to submit the return. Several validations are performed at this stage -- see [Section 12.8.3, "Validations Performed in Returns Process"](#).
- See [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#), for important information about differences in returns functionality when using pre-Release-11.5.10 versions of Oracle Order Management versus the 11.5.10 release.
9. Oracle iStore displays a confirmation page with the return order number, and sends a confirmation e-mail notification to the user with the relevant return details.
10. If the merchant has set up returns to require approvals:
- a. As the return moves into the approvals stage, its status changes to Pending Internal Approval.

- b. Approver(s) receive e-mail notification that a return order has been submitted for approval. If a hierarchy of approvers has been implemented, a notification is sent to the first approver. If the first approver rejects the return, its status changes to Rejected; if he approves it, the next approver in the hierarchy receives the e-mail notification.
 - c. If any approver rejects the return order, its status remains Rejected.
 - d. If the return order is approved, its status changes to Booked and it is processed into Oracle Order Management.
11. Whether the return is approved or rejected, the customer receives an e-mail notification informing him of the return status and reasons, if any, why a return was not approved. If the order is approved, the return location is provided in the e-mail, providing the merchant has set this up.

12.8.5.2 Multiple-Order Return Flow

The returns process flow for returning items from multiple orders is as follows:

1. A customer logs into a site and selects Orders > Returns. The Returns page only displays if the profile option, IBE: Use Returns, is set to Yes. The Returns page displays all existing returns. A B2B user with the [IBE_VIEW_RETURN_ORDER](#) permission can see all of his organization's return orders. If he does not have this permission, he can still see his own return orders.
2. The customer selects the Return Items button. For B2B users, the Return Items buttons only displays if the user has the [IBE_CREATE_RETURN](#) permission in his user role.
3. The Create Return: Search and Select Items page appears. If applicable, this page displays pending returns in addition to the search utility. See [Section 12.8.4, "Pending Returns Queue"](#), for more information.

In the Create Return: Search and Select Items page, users can search by serial number, part number, or order number. Only exact matches are allowed, and the search utility does not support wildcard characters. The search utility is case-insensitive.

Serial Number Search:

See also: [Section 12.8.8.9, "Step 9 - Verify Inventory Setup for Items with Serial Numbers"](#)

- Users must search for serial numbers one at a time.

- Found serial numbers display in the search results table. Users select an icon in the Serial Number column to view a pop-up window with the details of one or multiple serial numbers.
- Serial numbers are not displayed in any other areas of the Order Tracker UI; they appear only in the Create Return: Search and Select Items page.

Order Number or Part Number Search:

- To search by order number or part number, users can search for more than one at a time, putting a space between the numbers in the search textbox.
 - Orders or part numbers retrieved that are referenced by serial numbers will display the serial-number pop-up icon in the Serial Number column.
4. Items located by the search utility display in the Results table, along with related information, such as part number, order number, quantity ordered, and price. Items which cannot be returned will not be selectable, and the Returnable column will display No instead of Yes.

Note: If a return policy has been implemented, processing constraints set up in Oracle Order Management will determine whether or not the order line can be returned. See [Section 12.8.8.5, "Step 5 - Set up Returns Policy"](#).

5. The user selects the items to be returned and selects Add to Return. Oracle iStore displays the Create Return: Review and Submit page. See [Section 12.8.5.1, "Single-Order Return Flow"](#), beginning with step 6, for remaining steps in the flow.

12.8.6 Tracking Returns

Customers can track return orders by selecting either of the following after logging into the Customer UI:

- **Orders > Returns** -- In the Returns page, customers can search for returns, and view summarized or detailed views of returned items, including statuses.
- **Orders > Track Orders** -- In the Track Orders page, customers can search for orders and view summaries of orders. After drilling down into the order details, customers can see details about returned items referenced within the orders, if applicable -- If the user has already returned one or more items of the order being viewed, those return order lines will be shown in the Related Returns table. Return order lines from pending or cancelled orders will not be shown.

12.8.6.1 Returns Profile Setting and UI Display

If the profile option, IBE: Use Returns is Yes:

- Orders with Order Category Code = ORDER will be displayed in the Track Orders subtab only
- Orders with Order Category Code = MIXED and at least one line with Line Category Code = ORDER will be displayed in Track Orders subtab
- Orders with Order Category Code = MIXED and at least one line with Line Category Code = RETURN will be displayed in Returns subtab
- Return orders with Order Category Code = RETURN will be displayed in Returns subtab only

Thus, a Mixed Order with lines of both Line Category Code as ORDER and RETURN can be queried and displayed in both Track Orders and Returns subtabs.

If IBE: Use Returns is No or not set, all types of orders/returns will be displayed in the Track Orders subtab.

Note that users will see all orders which have at least one order line.

See also: [Section 12.8.8.1, "Step 1 - Set Profile Options"](#), and [Section A.7.0.68, "IBE: Use Returns"](#)

12.8.7 Rules and Guidelines for Returns

Following are rules and guidelines for Returns functionality. For additional details related to Oracle Order Management, see the *Oracle Order Management Suite Implementation Manual*. This section contains:

- [Section 12.8.7.1, "General Rules and Guidelines"](#)
- [Section 12.8.7.2, "Rules and Guidelines for Items"](#)
- [Section 12.8.7.3, "Rules and Guidelines for Returns Page"](#)
- [Section 12.8.7.4, "Rules and Guidelines for Users and Organizations"](#)
- [Section 12.8.7.5, "Customers, Contacts, and Addresses Rules and Guidelines"](#)

12.8.7.1 General Rules and Guidelines

Following are some general rules and guidelines for Returns.

1. There are important differences in the Returns functionality provided through Oracle iStore if you are using Oracle Order Management Release 11.5.10 versus

earlier releases. See [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#), for details.

2. Although Oracle Order Management supports several return types, Oracle iStore supports only Returns for Credit. Returns for Credit means that the customer is credited the money spent on the item, less any fees imposed by the merchant.
3. Oracle iStore supports only, "At the price of the original order" pricing.
4. In Oracle Order Management, the flow of an RMA order or order lines is determined by Order Type at the header (cart) level and the Line Type at the line (item) level. A return line is indicated in Order Management by its Line Type, negative item quantity, and line total price.
5. Each order type and each line type is associated with a workflow process in Oracle Order Management. Line types can be variations of Return, such as Return with Approval, Return for Credit Only, etc., and have a line type category of RETURN. Out-of-the-box, Oracle iStore uses the default line type as the one defined in the Transaction Type form as the default line type.
6. A return quantity cannot be greater than ordered quantity.
7. An order line can be returned multiple times in multiple return orders, but the combined return quantity cannot be greater than ordered quantity. If the user has already returned some quantity, then he can only return the original ordered quantity minus the returned quantity. This check is done at the time the return order is booked. If his return order does not comply with these rules, the user will see the error message, *Invalid quantity*.
8. Returned quantities are shown in negative numbers in Oracle Order Management. Oracle iStore's UI, however, always shows the quantities as positive numbers.
9. Oracle Order Management does not store a return location for a return order. Therefore, merchants must specify the return location in the Oracle Order Management workflow's e-mail notification message.
10. In Order Tracker, you can view orders placed through other Oracle applications, such as Depot Repair, Oracle Order Management, and Oracle Quoting. For this reason, Oracle iStore supports the viewing of mixed orders in the Order Tracker (including Returns) pages. Mixed orders with at least one return line will display. When users view details of a mixed order, there are three sections:
 - a. Order Items -- This area shows items ordered in the order being viewed.

- b. Return Items -- This area shows lines being returned with the order being viewed, whether or not they were part of this order number or another order number.
 - c. Related Returns -- This area shows return lines for the order number being viewed, which were returned earlier than the order being viewed.
11. Security on returns -- Only the user who initiated a pending return can modify it, until he submits it.
 12. Re-load return message -- If a sales representative and a user are simultaneously updating a return, the user receives an error message indicating he should re-load the return page.
 13. Return charges -- Merchants can setup return fees using modifiers. When setting up charges, merchants can specify special charges to be applied specifically to returns, for example, freight charges, restocking fees, return handling, damages, etc. These fees are subtracted from the total return amount, and the UI display reflects the adjusted amounts.

12.8.7.2 Rules and Guidelines for Items

Following are rules and guidelines for items.

1. In order for it to be returnable, a product's Returnable flag in Inventory must be active. See [Section 12.8.8.6, "Step 6 - Verify Oracle Inventory Returns Flag"](#).
2. Order lines from orders in Entered or Cancelled status cannot be returned.
3. Customers can return model bundles and configured items, but Oracle iStore does not support returning only components of the model/configured item -- these items are returnable as a whole item and not as individual items.
4. Serviceable items can be returned through Oracle iStore, but service items cannot.
5. Decimal quantities can be allowed for returnable items. Follow the guidelines in [Section 12.1.20, "Decimal Quantities for Cart Items"](#).
6. "Trade-in Line" lines in Mixed Orders (which have line Category as "RETURN") cannot be returned.
7. An item cannot violate the return policy of the merchant. A return policy can be set up using Processing Constraints and additional checks are possible through the API. See [Section 12.8.8.5, "Step 5 - Set up Returns Policy"](#), and the Oracle Order Management documentation for further details.

See also: [Section 12.8.8.9, "Step 9 - Verify Inventory Setup for Items with Serial Numbers"](#)

12.8.7.3 Rules and Guidelines for Returns Page

Following are rules and guidelines for the Returns subtab and pages.

1. The Returns subtab and associated Returns page only display if the profile option, IBE: Use Returns, is set to Yes. In addition, B2B users must have the IBE_CREATE_RETURN permission to see the appropriate functionality on the page. See [Section 12.8.8, "Implementing Returns"](#), for more information.
2. User permissions do not apply to B2C users; therefore, these users will always see all returns functionality, as long as IBE: Use Returns is Yes.
3. When a user navigates to the Returns page, all orders submitted in x days will be shown. Note that "submitted" means:
 - Pre-booking feature disabled: Submitted means Booked/Closed/Cancelled return orders
 - Pre-booking feature enabled: Submitted means returns in Pending Internal Approval and Booked/Closed/Cancelled return orders"Not submitted" means pending returns or returns in Entered/User Working statuses.
4. In Oracle iStore's Returns pages, you can modify the LOV that displays the reasons a user is returning an order. See [Section 15.6.5, "Returns Reasons Lookup"](#), for information on the default values for the Returns lookup.

12.8.7.4 Rules and Guidelines for Users and Organizations

This section contains Returns rules and guidelines specific to users and organizations.

1. In order for a customer to initiate a return order:
 - a. An order must exist with at least one returnable product.
 - b. B2B users must have the [IBE_CREATE_RETURN](#) permission in their user roles.
 - c. For a pending return to be retrieved and submitted, it must have the same party ID, currency code, operating unit, and customer account ID as those retrieved for the logged-in user's current session.

2. For B2B customers, returns are allowed within an organization, providing the the order has been booked in the same organization, currency, and account, as that of the user creating the return order. If these do not match, a message displays directing the customer to contact his sales representative.
3. A B2B user can view the submitted returns of another user in the same organization, but cannot view the pending returns of another user. Note that B2B users must have the [IBE_VIEW_RETURN_ORDER](#) permission to view orders across the organization.
4. For B2C users, if the merchant has enabled returns, all users will see the Return Items button in the Order Details page and the Returns subtab within the Orders menu, regardless of whether they have returnable items -- for B2C users, there is no way to disable the Returns functionality by user or user role.

12.8.7.5 Customers, Contacts, and Addresses Rules and Guidelines

Following are some rules and guidelines surrounding customer information, contact information, and address information with returns:

See also: [Section 12.8.3, "Validations Performed in Returns Process"](#)

Note that *order level* is also known as *header level* and *cart level*. And, *line level* is interchangeable with *item level*.

Order-Level Address Behavior:

The following is the behavior for addresses at the order level.

Bill-To Address:

1. A bill-to customer and address are mandatory at order level for a return order.
2. Address defaulting: At header level, logic on how bill-to addresses are selected for B2B and B2C users is as follows:
 - a. Oracle iStore selects the bill-to primary address from the customer's address book.
 - b. If this doesn't exist, Oracle iStore selects the first non-primary bill-to address from the address book.
 - c. If this doesn't exists, Oracle iStore selects the primary ship-to from the address book
 - d. If this doesn't exists, Oracle iStore selects the non- primary ship-to from the address book

- e. If this doesn't exist, Oracle iStore selects the first valid bill-to address from the original order lines.
 - f. If there is no valid address, Oracle iStore shows an error message directing the user to create a new address.
3. B2B users cannot change bill-to addresses at the order level -- only line-level billing data is exposed for B2B users.
 4. B2C users cannot change bill-to address at the line level -- only header-level billing data is exposed for B2C users

Ship-To Address:

1. A ship-to customer and address are **not** mandatory at order level for a return order.
2. Address defaulting: Oracle iStore does not default any value for ship-to address at the header level. Hence, ship-to defaulting occurs per Oracle Order Management's defaulting rules.
3. For both B2B and B2C users, Oracle iStore does not expose ship-to addresses in the Returns pages. Thus, the user cannot modify the ship-to address at the order level.

Item-Level Address Behavior:

The following is the behavior for addresses at the line level.

B2B users, Bill-To:

1. The bill-to address and contact for the return lines in the pending return queue are defaulted from the original order.
2. If any of the bill-to addresses copied from the original order are invalid, Oracle iStore shows an error message when the user submits the return; the user can then modify the address.
3. The customer can modify the bill-to contact and address at the return-line level, by accessing the Line Level Billing page through the Billing icon. Note that in these contact/address pages, the user will not be able to create a new contact/address. When the user changes the bill-to contact, the existing bill-to address is set to null, and the user needs to select an address for the contact or one of the organization contacts.
4. The user can also select View all Contacts to select a different contact and address.

B2B users, Ship-To:

1. The bill-to address and contact for the return lines in the pending return queue are defaulted from the original order.
2. Since Oracle iStore does not expose these addresses in the Returns UI, the user cannot modify the ship-to address at the item level.

B2C users, Bill-To:

- When a B2C user either updates the header level bill-to address or submits the return order, Oracle iStore propagates the bill-to address chosen at the order level to all the return lines. Thus, for Oracle iStore submitted returns, the bill-to address on the return-lines will be same as the bill-to on the return order.

B2C users, Ship-To:

Behavior is the same as B2B line-level ship-to behavior.

Note: No users can change the bill-to customer.

12.8.8 Implementing Returns

Set up Oracle iStore's returns functionality according to the steps detailed in this section. Be sure to review the returns conditions in [Section 12.8.7, "Rules and Guidelines for Returns"](#).

For Oracle Order Management setup information, see the Oracle Order Management documentation.

Main topics in this section include:

- [Section 12.8.8.1, "Step 1 - Set Profile Options"](#)
- [Section 12.8.8.2, "Step 2 - Verify B2B User Permissions"](#)
- [Section 12.8.8.3, "Step 3 - Set up Transaction Type"](#)
- [Section 12.8.8.4, "Step 4 - Set up Returns with Approval"](#)
- [Section 12.8.8.5, "Step 5 - Set up Returns Policy"](#)
- [Section 12.8.8.6, "Step 6 - Verify Oracle Inventory Returns Flag"](#)
- [Section 12.8.8.7, "Step 7 - Customize Returns Lookups"](#)
- [Section 12.8.8.8, "Step 8 - Set up E-Mail Notification Support"](#)
- [Section 12.8.8.9, "Step 9 - Verify Inventory Setup for Items with Serial Numbers"](#)

12.8.8.1 Step 1 - Set Profile Options

Set the following profile options:

1. **IBE: Use Returns** --- Set to Yes to enable the returns functionality. See [Section A.7.0.68, "IBE: Use Returns"](#), and [Section 12.8.6.1, "Returns Profile Setting and UI Display"](#), for more information.
2. **IBE: Return Orders Transaction Type** -- Set to the transaction type you wish returns to be created under (for example, set to the transaction type created in [Section 12.8.8.3, "Step 3 - Set up Transaction Type"](#)). See [Section A.7.0.49, "IBE: Return Orders Transaction Type"](#), for more information.
3. **IBE: Enable Return Pre-booking Approval** --- Set to Yes only under certain conditions described in [Section A.7.0.33, "IBE: Enable Return Pre-booking Approval"](#). Otherwise, leave the profile option set to No, which is its default value.
4. **IBE: Enable Return Policy** --- Set to Yes only if implementing additional processing constraints for return policies. See [Section A.7.0.34, "IBE: Enable Return Policy"](#), for more information.
5. **ASO: Default Salesrep** --- Set this to the default sales representative to avoid errors. See [Section A.14.0.116, "ASO: Default Salesrep"](#).

See the *Oracle Order Management Suite Implementation Manual* for setup information related to Oracle Order Management.

12.8.8.2 Step 2 - Verify B2B User Permissions

Verify that the B2B customers who will be submitting returns have the [IBE_CREATE_RETURN](#) permission in their user role. Only B2B users with this permission will be able to access the Return Items button in Order Tracker.

To view returns across their organizations, B2B users must have the permission, [IBE_VIEW_RETURN_ORDER](#). See [Section C.6.0.35, "IBE_VIEW_RETURN_ORDER"](#), for more information.

Note: If upgrading to Oracle iStore Release 11.5.10, the returns permissions are not migrated to the B2B user roles automatically. Therefore, for pre-R11.5.10 users, you must manually add these permissions to the roles. See [Appendix C, "Seeded User Data"](#), for more information on the permission migration script and default user permissions.

12.8.8.3 Step 3 - Set up Transaction Type

You may use the following steps as an example setup for Oracle iStore returns transaction type. See the *Oracle Order Management Suite Implementation Manual* for additional setup information.

Important: For Oracle iStore returns, only set up transaction types using Order Category = Return. Mixed should **not** be used and will not work.

1. As Order Management Superuser, navigate to the Transaction Types window and set up a new Order Type with following attributes:
 - a. Name/Description – iStore RMA (user definable)
 - b. Order Category – Return
 - c. Transaction Type Code – Order
 - d. Workflow Fulfillment Flow/Order Flow -- Depends on whether the returns pre-booking feature is enabled:

--If the profile, IBE: Enable Returns Pre-Booking Approval, is set to No, use Order Flow - Return with Approval. If this workflow is used, you can enable an approval process, after the return is Booked in Order Management and if an Approval List has been set up.

--If the profile, IBE: Enable Returns Pre-Booking Approval, is set to Yes, use Order Flow - Return with Submission and Approval.

See [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#), for more details on the returns pre-booking approval feature.
 - e. Sales Document Type – Sales Order
 - f. Default Transaction Phase – Fulfillment (applicable only if the returns pre-booking feature is enabled)
2. Associate a price list with the above transaction type if using return fees, multi-currency price lists, and/or Order Management defaulting rules based on price list.
3. Enter other required/optional information and Save.
4. Select Assign Line Flows, and assign a line type with Line Flow - Return for Credit with Receipt line flow. Note that Line Type is a required value in Transaction Types setup; otherwise, a "LineTypeId missing" error will display.

5. Document Sequence Assignment --- Assign the RMA Document Sequence on the newly created, iStore RMA, transaction type.

12.8.8.4 Step 4 - Set up Returns with Approval

Optionally, merchants can set up returns to use an approval mechanism before they are submitted to Oracle Order Management, if they are using at least Release 11.5.10 of Oracle Order Management (see [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#)).

The approvals use standard Oracle Workflow processes and related e-mail notifications owned by Oracle iStore. The e-mail notifications are: Return Order Approval and Return Order Rejection. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for details.

By setting up returns with approval, administrators can approve or reject return orders before they are processed in Oracle Order Management. In addition, merchants can specify a hierarchy of approvers.

To set up returns with approval:

1. Approver List Setup --- Set up a new Approver List with following attributes:
 - List Name/Description – iStore RMA Approvers/iStore RMA Approvers
 - Transaction Type -- iStore RMA
 - Transaction Phase – Fulfillment
2. Select one role or responsibility that will be responsible for approvals.

Note that this LOV will display all applicable Oracle Workflow roles or Oracle Applications (FND) responsibilities. Selecting a Workflow role will enable all the people attached to that role to get the e-mail. Similarly, the same behavior will occur with an FND responsibility.

12.8.8.5 Step 5 - Set up Returns Policy

Optionally, set up a returns policy which utilizes Oracle Order Management processing constraints functionality. Processing constraints allow merchants to control changes to sales orders and returns at all stages of the order or line workflows. Processing constraints provide:

- The ability to control changes based on user responsibility
- The ability to call custom PL/SQL code to determine whether a processing constraint condition evaluates to true

- The ability to constrain operations at any point in the order or line process flow

See the *Oracle Order Management Suite Implementation Manual* for additional setup information.

12.8.8.6 Step 6 - Verify Oracle Inventory Returns Flag

Customers can select an order line to return only if the item is returnable. This is enabled by selecting the Returnable checkbox in the Oracle Inventory form (under Order Management tab). For more information, see the *Oracle Inventory User's Guide*.

12.8.8.7 Step 7 - Customize Returns Lookups

Return Reasons and Returns search query values exposed in the UI are Oracle Applications lookups which can be customized to fit your business needs. See [Section 15.6.5, "Returns Reasons Lookup"](#), for details.

12.8.8.8 Step 8 - Set up E-Mail Notification Support

Depending upon which version of Oracle Order Management you are using, you may need to perform additional setups for e-mail notifications, including optionally specifying a return location in the notification messages. See [Section 12.8.2, "Returns Functionality With and Without OM Release 11.5.10"](#), for more information.

12.8.8.9 Step 9 - Verify Inventory Setup for Items with Serial Numbers

In the Oracle Inventory Master Items form, for each applicable product, set the Serial Controlled property to one of the following values:

1. At Receipt
2. At Sales Order Issue
3. Predefined

If the serial-controlled flag is not set for an item, in the Create Return: Search and Select Items page, users cannot search by serial number, nor will the Serial Number column show the serial number pop-up icon.

Until the order is shipped to the customer, the serial number search does not return a record in Oracle iStore.

In addition to the above conditions, for proper setup, the serial numbers should have been generated for the order line in Oracle Inventory.

For more information, see the *Oracle Inventory User's Guide*.

12.9 Oracle iStore and Party/Account Merge

Party Merge and Account Merge functionalities are part of the Data Quality Management tools provided by Trading Community Architecture (TCA). They allow you to identify and resolve duplicates present in the Trading Community registry. Different applications throughout the Oracle E-Business Suite have data associated with both Parties and Customer accounts. Any references to Party and Accounts should be updated when Parties or Accounts are merged. This ensures data integrity across the Oracle E-Business Suite.

This section discusses Oracle iStore's behavior with TCA's concurrent programs which effect Party / Account Merge operations.

For more information on the TCA functionality discussed in this section, visit [OracleMetaLink](#); use keywords: TCA, Trading Community Architecture.

This section includes the following main topics:

- [Section 12.9.1, "Party / Account Merge Overview"](#)
- [Section 12.9.2, "Oracle iStore's Behavior with Party / Account Merge"](#)
- [Section 12.9.3, "Best Practice: Run Account Merge after Party Merge"](#)
- [Section 12.9.4, "Oracle iStore Foreign Keys Used in Party / Account Merge"](#)

12.9.1 Party/Account Merge Overview

Party Merge and Account Merge are TCA utilities which merge or transfer party and account data in the trading partner database. There are important differences between the two operations, as discussed in the following sections:

- [Section 12.9.1.1, "Party Merge"](#)
- [Section 12.9.1.2, "Customer Account Merge"](#)

12.9.1.1 Party Merge

Party Merge eliminates duplicate data in the registry layer in order to keep the trading partner database accurate and clean. It consolidates duplicate parties after they have been entered in the system. The merging enables users to have a single view of each party.

Party Merge can merge information for:

- **Parties** --- Merge duplicate parties

- **Party sites** --- Merge duplicate party sites for a party; for example, merge duplicated manufacturing locations of a party
- **Party relationships** --- Related child entities are merged, such as party relationships, contact information, party profiles, customer accounts and information obtained from third-party sources

There are two types of operations performed by Party Merge:

- **Merge** --- Inactivates an entity and transfers its dependent entities
- **Transfer** --- Moves an entity from one parent to another, if a duplicate does not exist

Example:

ABC Company has implemented the Oracle E-Business Suite

While checking the quality of its data, ABC Company determines that duplicate records exist for a party, *Vision Corporation*. Data for this party were entered into the database under the names *Vision Corp.* and *Vision Inc.* Using the Party Merge utility, ABC Company plans to merge the two Vision parties -- *Vision Corp.* and *Vision Inc.*

Party Merge will:

1. **Inactivate** the *Vision Corp.* party record
2. Either **merge** or **transfer** the details of *Vision Corp.*, e.g., transfer or merge party sites: 500 Oracle Pkwy. and 600 Vision Pkwy.
3. **Transfer** party site 500 Vision Pkwy. to *Vision Inc.*

12.9.1.2 Customer Account Merge

Customer Account Merge is a tool that merges transactions from one customer account to another customer account. The merging or transferring of these duplicate records allows the consolidation of customer account transactions --- such as orders, invoices and payments --- into one customer account relationship.

12.9.2 Oracle iStore's Behavior with Party/Account Merge

Oracle iStore supports and treats Party/Account Merge in various ways, as discussed in the following sections:

- [Section 12.9.2.1, "Shopping Lists"](#)
- [Section 12.9.2.2, "Express Checkout Preferences"](#)

- [Section 12.9.2.3, "Site Access Restrictions"](#)
- [Section 12.9.2.4, "Shared Carts"](#)
- [Section 12.9.2.5, "Active, Default-Named, and System-Saved Carts"](#)

In Party / Account Merge operations, Oracle iStore’s access to party data is accomplished through foreign keys on the data. These are summarized in [Section 12.9.4, "Oracle iStore Foreign Keys Used in Party / Account Merge"](#).

12.9.2.1 Shopping Lists

Account Merge updates both the party and account IDs of the merge-from party to point to the merge-to party. Thus, merge-to party, after the account merge, will see additional shopping lists from the merge-from party.

In addition, with Party or Account Merge:

- Merge-to users will have access to the same shopping lists as before the merge.
- New shopping lists are created during the transfer.
- If more than one shopping lists exists for a user, these will **not** be merged into a single list.

The Oracle iStore foreign key to the party and account layer for shopping lists data is IBE_SH_SHP_LISTS_ALL.

12.9.2.2 Express Checkout Preferences

In a Party Merge, Express Checkout preferences do not change in the merge-to party.

The Oracle iStore foreign key to the party layer for Express Checkout is IBE_ORD_ONECLICK_ALL.

12.9.2.3 Site Access Restrictions

In a Party Merge, merge-to settings override merge-from settings for access restrictions. The following table, Site Access Restrictions - Expected Behavior After Party Merge, shows the expected behavior of these preferences after Party Merge.

Table 12–7 Site Access Restrictions - Expected Behavior After Party Merge

Preference	Merge-from	Merge-to	Expected Behavior
No restriction	On or Off	On or Off	Merge-to settings take priority and are not changed.

Table 12–7 Site Access Restrictions - Expected Behavior After Party Merge

Preference	Merge-from	Merge-to	Expected Behavior
Only the following organizations can access the site	On	On	Additional organizations are added to the merge-to list from the merge-from list.
Only the following organizations can access the site	Off	On	Merge-to settings take priority and are left On.
Only the following organizations can access the site	On or Off	Off	Merge-to settings take priority and are left Off.
The following organizations cannot access the site	On	On	Additional organizations are added to the merge-to list from the merge-from list.
The following organizations cannot access the site	Off	On	Merge-to settings take priority and are left On.
The following organizations cannot access the site	On or Off	Off	Merge-to setting take priority and are left Off.

The Oracle iStore foreign key to the party layer when dealing with site access is: IBE_MSITE_PRTY_ACCSS.

12.9.2.4 Shared Carts

In Party Merge, Oracle iStore shared carts have the following rules:

- Shared carts in the merge-from party are transferred to the merge-to party
- If parties have the same cart, then the merge-from cart is ignored (i.e., won't be shared twice to the merge-to user)

In Account Merge, Oracle iStore shared carts follow these rules:

- Account ID and Party ID of the merge-from party will be changed to that of the merge-to party
- A duplicate row is defined as having identical party_id, account_id and quote_header_id

The Oracle iStore foreign key to the party layer for shared carts is IBE_SH_QUOTE_ACCESS.

12.9.2.5 Active, Default-Named, and System-Saved Carts

In Party or Account Merge, the following is the behavior for active, default-named, and system-saved carts:

Note: Default-named and system-saved carts are carts that are named by the system. See [Section 12.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.

- **Active carts** --- No changes are made to any active cart items or names in the merge-to party or account.
- **System-saved carts** --- System-saved carts, whose default name is "**Store Saved**", are not altered in any way in the merge-to party or account.
- **Default-named carts** --- These carts, whose default name is "**Store**", are renamed to the default name for system-saved carts ("**Store Saved**") in the merge-to party or account.

The Oracle iStore foreign key to the party layer for active carts is IBE_ACTIVE_QUOTES_ALL.

12.9.3 Best Practice: Run Account Merge after Party Merge

By running Party Merge without Account Merge there is the possibility for a party to have two accounts. To avoid multiple accounts to one party, it is recommended to run Account Merge after Party Merge.

See the following for examples on how the accounts are treated in the two scenarios:

- [Section 12.9.3.1, "Party Merge Only Scenario"](#)
- [Section 12.9.3.2, "Run Party Merge Then Account Merge Scenario"](#)

12.9.3.1 Party Merge Only Scenario

In the scenario where only Party Merge is run, the following table, Account Numbers in Party Merge Only Scenario, shows what should be expected:

Table 12–8 Account Numbers in Party Merge Only Scenario

Merge	Party ID	Account ID
Before Party Merge		
To	1000	2000
From	1100	1800

Table 12–8 Account Numbers in Party Merge Only Scenario

Merge	Party ID	Account ID
After Party Merge		
To	1000	2000
		1800

Party ID 1000 will have two accounts. At login, the system will pick the account **created first**. In the example above, account 1800 (from system) will be used at logon.

12.9.3.2 Run Party Merge Then Account Merge Scenario

In the scenario where Account Merge is run **immediately after** Party Merge, the following table, Account Numbers in Account Merge After Party Merge Scenario, shows what should be expected:

Table 12–9 Account Numbers in Account Merge After Party Merge Scenario

Merge	Party ID	Account ID
Before Party Merge and Account Merge		
To	1000	2000
From	1000	1800
After Party Merge and Account Merge		
To	1000	2000 (1800 merged)

12.9.4 Oracle iStore Foreign Keys Used in Party/Account Merge

The following table, Oracle iStore Foreign Keys Used in Party / Account Merge, shows the foreign keys used in Party / Account Merge.

Table 12–10 Oracle iStore Foreign Keys Used in Party/Account Merge

Entity Name	Description
IBE_SH_SHP_LISTS_ALL	Shopping lists
IBE_ORD_ONECLICK_ALL	Express Checkout preferences
IBE_MSITE_PRTY_ACCSS	Store access restrictions
IBE_SH_QUOTE_ACCESS	Shared carts

Table 12–10 Oracle iStore Foreign Keys Used in Party/Account Merge

Entity Name	Description
IBE_ACTIVE_QUOTES_ALL	Active carts

For more information on the TCA functionality discussed in this section, visit [OracleMetaLink](#); use keywords: TCA, Trading Community Architecture.

Implementing User Management

This chapter contains information on implementing and maintaining user management and site registration functionality in Oracle iStore 11i.

Main topics in this chapter include:

- [Section 13.1, "Overview of User Management"](#)
- [Section 13.2, "User Registration Overview"](#)
- [Section 13.3, "User Management Integration with Other Oracle Applications"](#)
- [Section 13.4, "Ensuring Proper Dependency Setup for User Management"](#)
- [Section 13.5, "User Types Overview"](#)
- [Section 13.6, "Registering Using Oracle iStore"](#)
- [Section 13.7, "Managing Business Users with Oracle iStore"](#)
- [Section 13.8, "User and Company Profile Management Overview"](#)
- [Section 13.9, "Setting up Self-Service Login Assistance"](#)

13.1 Overview of User Management

User management is the process of registering a user and thereafter maintaining the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements. User management involves registering new users, modifying existing users, approving or rejecting user approval requests, setting up enrollments and registration templates, assigning users to business accounts, and more. The technology stack for performing most of the background setups and processes for user management is supplied through the Oracle CRM Technology Foundation and Oracle Common Application Components. Oracle iStore also has a comprehensive set of user

management capabilities, including the ability to register users, configure registration pages, approve users, and manage user profile information.

This chapter discusses the capabilities and functionalities of user management within Oracle iStore, with some summarized information about using Oracle CRM Technology Foundation and Oracle Common Application Components for user management. For complete information on utilizing the capabilities of the Oracle CRM Technology Foundation and Oracle Common Application Components, see the user management chapters of:

- *Oracle Applications CRM System Administrator's Guide*
- *Oracle Common Application Components Implementation Guide*
- *Oracle Common Application Components User Guide*

These guides are available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

13.1.1 Key Terms and Definitions

This section provides key terms and definitions related to user management.

- **Approval Definition** --- Approval definitions use Oracle Workflow to track and route request(s) to the approvers. An approval definition can deliver an e-mail notice to the approvers. Both user types and enrollments can share the same approval definition. The e-mail notifies what types of requests are being requested (user type or enrollment) and what action the approver needs to take.
- **Business User** --- Business-to-business (B2B) users represent companies whose information is stored in Oracle Trading Community Architecture. Typically, when B2B users self-register, they enter an Organization ID (Registry ID) created when the first user from that company registered.
- **Enrollment** --- An enrollment is a set of add-on services that you can receive during or after registration. "Services" include responsibilities, roles, approval definitions, and registration templates. One enrollment corresponds to zero or one responsibility, zero or one template, zero or one approval and zero or more roles. Enrollments are application specific and can be tied to user types.
- **Permission** --- A unit of privilege that is granted to a user within his user role. It usually serves to grant a certain type of access to a resource. Resources are application elements such as objects or methods of objects. A resource can have unique permissions for each way that it can be accessed.

- **Primary User** --- An administrative B2B end-user charged with fulfilling user management functions for his company. Typically, when the first B2B user registers from a company, an Organization ID (Registry ID) is created.
- **User Type Templates** --- Applications require varying pieces of information to register different types of users. User Type templates refer to JSP files that are used to capture the registration information that is special to a particular User Type. Oracle iStore user types are associated to specific user type templates, defined in the Oracle iStore Template Manager, and do not use JTF registration templates.
- **Responsibilities** --- When a registered user initially logs in to the Oracle E-Business Suite HTML login, the system checks the user's current responsibility and then passes the user into the menu structure associated with the HTML application to which that responsibility is linked. In this way, different user types can have different responsibilities and therefore can have different menus assigned to them. Responsibilities can either be granted automatically upon registration, through the user management framework, or on a case-by-case basis by an administrator.
- **Roles** --- Within each HTML page, granular permissions control which resources on a page a user is allowed to access. These resources may be a button, a data manipulation permission, a view permission, and so on. In Oracle HTML applications, permissions are grouped into roles which can then be granted to users. Roles are granted either automatically (depending upon your configuration) or on a user-by-user basis by an administrator.
- **User Profile** --- User profiles, which are associated with responsibilities, are sets of user interfaces that give users access to their personal data and preferences.
- **User Profile Menus** --- User profile menus are groupings of user profile pages which are relevant to a particular responsibility. User Profiles are user interfaces to users' personal data and preferences. A number of responsibilities can share the same user profile menu.
- **User Type** --- A category of users that caters to the specific needs of an application's business requirements. User types allow flexible and extensible ways for defining, categorizing and implementing behavior of users. A user type is associated to only one template, one responsibility, zero or one approval, zero or more enrollments, and zero or more roles. Examples include: *Register your company*, *Register as individual*, and *Register as a user of an existing company*.

13.2 User Registration Overview

Customers who wish to access Oracle iStore's Customer UI must register and be approved (if your implementation requires approval) before they have full permissions in the sites. Oracle iStore provides registration and user management screens for customer users; however, most user registration setups and associated processes are provided through a common registration and user management framework supplied by the Oracle Common Application Components and Oracle CRM System Administrator Console.

The Oracle CRM System Administrator Console is accessible by logging into the Oracle E-Business Suite HTML login (JTF login) as system administrator. System administrators have the ability to configure user types, roles, enrollments, registration templates, and approval processes. See the User Management section of the *Oracle Common Application Components Implementation Guide* for details.

Users begin registration by selecting the Register link, and then select their user type from a list of user type choices. The user framework supports a variety of user types and approval scenarios. In addition, you can use enrollments to automatically tie specific registration data to user types.

Note: Do not use the Oracle E-Business Suite HTML login page's Register Here link to register users of Oracle iStore. Use Oracle iStore's registration pages and user management pages instead. These pages are available in the Customer UI after your setup of Oracle iStore is complete. See [Section 13.6, "Registering Using Oracle iStore"](#), for details.

Registration involves filling in personal and company data (if applicable), and then waiting for approval (if required) before accessing the web sites. Depending upon the approval mechanisms in place, users are either automatically approved or approved by an administrative user. Note that in a multiple-approver scenario, all approvers must approve a user before he is granted access. Integration with Oracle Workflow (using both Oracle CRM Technology Foundation and Oracle iStore workflows) provides e-mail notification of user registration events and pending approvals.

For complete information on utilizing the capabilities of the Oracle CRM Technology Foundation and Oracle Common Application Components, see the user management portions of:

- *Oracle Applications CRM System Administrator's Guide*
- *Oracle Common Application Components Implementation Guide*
- *Oracle Common Application Components User Guide*

These guides are available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

13.3 User Management Integration with Other Oracle Applications

Users of Oracle iStore, Oracle iSupport, and Oracle Partner Management can attain an integrated user registration and management experience through the common registration framework and Oracle iStore's site management capabilities.

Topics in this section include:

- [Section 13.3.1, "Common Registration Framework Benefits and Behavior"](#)
- [Section 13.3.2, "User Type Support Across Applications"](#)
- [Section 13.3.3, "E-Mail Notifications Support"](#)
- [Section 13.3.4, "Preservation of Application Context"](#)
- [Section 13.3.5, "Deep Linking Support"](#)
- [Section 13.3.6, "Support for Single Sign-On"](#)

See also:

- [Chapter 5, "Implementing Site Management"](#)
- [Section F.15, "Sample User Registration Flows"](#)

13.3.1 Common Registration Framework Benefits and Behavior

The common registration framework has the following benefits and behavior:

- Common registration pages for integrating applications -- Implementers can leverage a common registration page that displays all the user types available for integrating applications' users.
- Brandable registration pages and common look and feel through Oracle iStore Template Manager -- Oracle iStore provides common registration screens for Oracle iSupport, Oracle iStore and Oracle Partner Management users which support a brandable and customizable look and feel and leverage existing Oracle CRM Technology Foundation APIs.

- The Oracle iStore framework utilizes the user type definition capabilities of the Oracle CRM User Management Framework, but the registration screens are created and managed through Oracle iStore's Template Manager. Merchants can customize and brand these screens using the existing capability provided by the Template Manager.
- The registration framework features the ability to enable and disable the user types that display in the registration page. The registration page can be configured to display user types associated to the Oracle iStore framework which are not self-service-enabled. For each user type, specific enrollments automatically award sets of roles and responsibilities. In addition, you can activate additional seeded enrollments which award more responsibilities and/or roles.
- The site and user management integration allows implementers to create Oracle Partner Management partner sites and support partner functionalities, utilizing the Oracle iStore Customer UI as the entry point for partner registration and partner program enrollments.
- Ability to have self-registration and approvals for non-primary users.
- Ability to understand the Oracle CRM User Management Framework approval processes.
- Ability to understand automatic (implicit) enrollments associated to user types and launch approval process if required -- see [Section 13.4.5, "Setting up Enrollments"](#), for more information
- Different icons for registration and sign-in in the Site Selection Page and Site Home Page -- Registered users select the Login icon to log in. Non-registered users select the Register icon to begin registration. Once the user is logged in, only the Sign Out icon is displayed in the Site Selection Page. See [Section 5.3, "Implementing Integrated Business Partner and Support Sites"](#), and [Section 6.4.8, "Navigation Icons"](#), for more details.
- Oracle iStore also supports mapping content to three left and three right bins on registration and user type selection pages. In this way, the same content can be shown on both of these pages. Or, each bin could be mapped to different content per user type. See [Section 8.10, "Configuring Bin Placement and Content"](#), for details.

13.3.2 User Type Support Across Applications

Integrated user management across applications provides registration and support for several user types within the Oracle iStore framework. Setup of user types is

performed in the Oracle CRM System Administrator Console. A table listing the seeded user types, enrollment keys, and default responsibilities and roles can be found in [Section C.7, "Site Management User Type Definitions"](#).

- **Individual users** --- Individual (B2C) users are associated to the default Oracle iStore and Oracle iSupport B2C user responsibilities and roles, via the following enrollments:
 - iStore (Individual User) --- This enrollment contains the seeded iStore customer responsibility. It is active by default.
 - Support Site: Individual User --- This enrollment contains default Oracle iSupport B2C user responsibility and roles. It is not active by default; you must enable it.

These two default enrollments give B2C users the required ability to access Oracle iStore sites and Oracle iSupport via the Oracle iStore Customer UI (if the Support Site: Individual User enrollment is activated). By default, these users do not require approval. No roles are assigned to this user type out-of-the-box.

- **Non-administrative business users** (B2B users) --- Typically, non-administrative B2B users are associated to the default Oracle iStore and Oracle iSupport non-primary B2B user responsibilities and roles, via the following enrollments:
 - iStore (Business User) --- This enrollment contains the seeded Oracle iStore customer responsibility and the non-administrative business user role.
 - Support Site: Business User --- This enrollment contains default Oracle iSupport non-administrative B2B user responsibility and roles. It is not active by default; you must enable it.

These two default enrollments give these users permission to access Oracle iStore and Oracle iSupport as regular business users. By default, these users require approval by a primary user within their company.

- **Primary business users** (primary B2B users) --- Typically, primary users are associated to the default Oracle iStore and Oracle iSupport B2B primary user responsibilities and roles, via the following enrollments:
 - iStore (Primary User) --- This enrollment contains the seeded iStore customer responsibility and the administrative business user role.
 - Support Site: Primary User --- This enrollment contains default Oracle iSupport administrative B2B user responsibility and roles. It is not active by default; you must enable it.

These two default enrollments give these users permission to access Oracle iStore and Oracle iSupport as primary users for their companies. By default, these users do not require approval.

- **Oracle Partner Management primary users** -- By changing the default user type setup, Oracle Partner Management primary users can be associated to primary B2B Oracle iStore responsibilities and roles via the iStore (Primary User) enrollment. This default enrollment gives these users permission to access the Oracle iStore sites as partner primary users. By default, these users do not require approval.
- **Oracle Partner Management non-primary users** -- By changing the default user type setup, Oracle Partner Management non-administrative B2B users can be associated to the non-administrative business user responsibilities and roles via the iStore (Business User) enrollment. This default enrollment gives these users permission to access the Oracle iStore sites as regular partner users. By default, these users require approval.

Note: Oracle Partner Management user types are not enabled by default. You must enable the user types in the Oracle CRM System Administrator Console. See [Section 27.2.9.1, "Enable Partner Management User Types"](#), the *Oracle Applications CRM System Administrator's Guide's* user management chapter, and the *Oracle Partner Management Implementation Guide* for details.

- **Any custom user types** -- See [Section 13.4.6, "Setting up Custom User Types"](#)

See [Section 13.6.1, "User Type Registration Selections"](#), for details about the seeded Oracle iStore registration page.

13.3.3 E-Mail Notifications Support

Leveraging integration with Oracle Workflow, several notification events are supported which inform users of registration events. See [Section 34.2.2, "Oracle iStore Seeded Notifications"](#), and [Section 34.2.3, "Other Supported Notification Events for User Management"](#), for details.

13.3.4 Preservation of Application Context

The following application context benefits are provided to users of integrating applications:

- Ability to keep the application context when registering and logging in from an application

- Ability to select the application context when registering and logging in from a generic website or login page

See [Section 5.3, "Implementing Integrated Business Partner and Support Sites"](#), for more information.

13.3.5 Deep Linking Support

Deep linking from external web sites to the registration page is supported. See [Section D.6, "Deep Linking Support"](#), for more information.

13.3.6 Support for Single Sign-On

See [Section 32.2, "Single Sign-On Functionality with Oracle iStore"](#).

13.4 Ensuring Proper Dependency Setup for User Management

The Oracle iStore user management framework leverages the Oracle CRM Technology Foundation user management framework through the Oracle CRM System Administrator Console. Therefore, you must ensure that the technology stack is properly set up before beginning user management operations.

Follow the steps in *Oracle Applications CRM System Administrator's Guide* to set up Oracle CRM Technology Foundation. Also perform the setups listed in [Section 2.11, "Setting up Oracle CRM Technology Foundation"](#), and the following sections, if business requirements dictate:

- [Section 13.4.1, "Setting up User Registration"](#)
- [Section 13.4.2, "Setting up Account Creation"](#)
- [Section 13.4.3, "Setting up Approval Definitions"](#)
- [Section 13.4.4, "Setting up E-Mail Notifications for User Management"](#)
- [Section 13.4.5, "Setting up Enrollments"](#)
- [Section 13.4.6, "Setting up Custom User Types"](#)

See also: [Section 13.9, "Setting up Self-Service Login Assistance"](#)

13.4.1 Setting up User Registration

Customer registration for users of Oracle iStore's Customer UI is enabled by default. See [Section 13.6, "Registering Using Oracle iStore"](#), for more information. Several options also exist for changing the default setup.

13.4.1.1 Default Roles and Responsibilities

The default roles and responsibilities awarded to users who register through Oracle iStore's Customer UI are controlled through the user type definitions in the Oracle CRM System Administrator Console. See [Section 13.3.2, "User Type Support Across Applications"](#), [Section 13.5, "User Types Overview"](#), and [Section C.7, "Site Management User Type Definitions"](#), for additional information.

13.4.1.2 Sign-On Profile Options

Be sure to check the values of the following Oracle CRM user management profile options:

1. Signon Password Length
2. Signon Hard to Guess
3. Signon Password Custom

These profile options can affect the restrictions that apply when users initially enter password and username information during registration. See the *Oracle Common Application Components Implementation Guide* for more information.

13.4.1.3 Default Language Preference for E-Mail Notifications

A user's default language preference for e-mail notifications is set from the user's session language during registration. The user can change this default setting in the Profile > Preferences page. See [Section 13.8.1.5, "Preferences Profile Page"](#).

13.4.1.4 Additional Setup Steps

Several additional setups may be required, depending on your implementation. See the following for more information:

- [Section 13.6, "Registering Using Oracle iStore"](#)
- [Section 13.5.1, "Oracle iStore User Types"](#)
- [Section 13.5.2, "User Types for Integrating Applications"](#)
- [Section 13.7, "Managing Business Users with Oracle iStore"](#)

13.4.1.5 Setting up Integrating Applications

In addition to the information found in this chapter, if integrating with Oracle iSupport or Oracle Partner Management, see [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#), and [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#), for specific user management information related to these applications.

See [Section C.7, "Site Management User Type Definitions"](#) for information about the user type definitions seeded in Oracle CRM Technology Foundation.

13.4.2 Setting up Account Creation

For users registering through Oracle iStore, a financial account is automatically created for them upon approval if the profile option, JTA: User Management: Automatic Account Creation, is set to Yes at site level. This is the default setting for this profile option. It is recommended that you leave this profile option set to Yes. If set to No, no account will be created for users upon approval, and thus newly approved users will not be able to log in to the Customer UI. See the *Oracle Common Application Components Implementation Guide* for more information.

In the event a user's registration is approved without an account number being assigned to him, a primary user or the system administrator can assign accounts after approval. See [Section 13.7.11, "Account Assignment After Approval"](#).

13.4.3 Setting up Approval Definitions

Oracle iStore supports the ability to launch approval processes for automatic (implicit) enrollments. Enrollments and approval processes are defined in the Oracle CRM System Administrator Console.

If a user registers, and the selected user type is associated to an enrollment that requires approval, a primary user needs to approve the enrollment request. Once the enrollment request is approved, the user can be assigned to the corresponding responsibility. It is recommended that the approval processes always be related to the user type definition and not to the enrollment.

For information about seeded user data, see [Section C.7, "Site Management User Type Definitions"](#).

13.4.3.1 Changing Default Approval Setup

Out-of-the-box, the Oracle CRM System Administrator is the only user registration approver. It is recommended that you change the seeded approval process so that a

primary user or users approve other B2B users within their organizations. Or, set up a primary super-user to approve users across multiple organizations.

See *Oracle Common Application Components Implementation Guide* and the *Oracle Applications CRM System Administrator's Guide* for instructions.

In addition, as a best practice, set up an approval group to monitor and approve user registration requests. See [Section 13.4.3.2, "Best Practice: Set up Approval Group"](#), for more information.

See also: [Section 13.7.2, "Explicitly Approving B2B Users"](#), and [Section 13.7.6, "Approval of Self-Registered B2B Users"](#)

13.4.3.2 Best Practice: Set up Approval Group

Business users can be approved by:

1. Designated primary user of the company
2. Any primary user of the company
3. Multiple primary approvers of the company
4. System Administrator in Oracle CRM Technology Foundation

As a best practice, it is recommended that you set up an approval group structure for user registration approvals. In an approval group, several primary users can be designated as approvers who view all of the pending approvals in the same approval queue. Following are high-level steps for setting up the approval group structure:

1. Set up an approval group.
2. Create a dummy user and set the approval group profile to point to the dummy user.
3. Make the dummy user the approver for a single organization or for all of the organizations registered as customers of a website.

For complete directions, see the *Oracle Common Application Components Implementation Guide* user management documentation.

13.4.3.3 Notifications for Approvals

E-mail notifications are automatically sent for approved or rejected user registrations. Primary users receive a notification indicating that a new user has registered in the system and has requested access. Additionally, a notification is sent to the new user to confirm that the registration is complete, but an approval is

required. See [Section 13.4.4, "Setting up E-Mail Notifications for User Management"](#), for more information.

13.4.4 Setting up E-Mail Notifications for User Management

For e-mail notifications to function, you must integrate with and properly set up Oracle Workflow. See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for Oracle iStore-specific information on this application. You also must set several notification-related profile options listed below.

13.4.4.1 Oracle CRM Technology Stack Notifications Profile Options

You must set the Oracle CRM Technology Foundation user management profile options listed in the Profile Options user management section of the *Oracle Common Application Components Implementation Guide*. The following steps summarize the Oracle CRM Technology Foundation profile options that affect Oracle iStore's registration e-mail notifications functionality. Note that this section contains limited, Oracle iStore-specific information on these profile options. Refer to the *Oracle Common Application Components Implementation Guide* User Management and Profile Options chapters for complete details.

1. **JTA_UM_Application_URL (JTA_UM_APPL_URL)** --- Set to the URL for the application login page. This will be sent to the requester in the e-mail notifications sent out as part of the user/enrollment approval process.
2. **JTF_UM_APPROVAL_URL** --- Set to the URL for the approval login page (jtflogin.jsp). This will be sent to approvers in the e-mail notifications sent out as part of the user/enrollment approval process. Set at site level.
3. **JTF_UM_MERCHANT_NAME** --- Set to the name of the company owning the system. This will be used in the e-mails sent out to notify customers of approval/rejection.
4. **JTA: Support Contact (JTA_UM_SUPPORT_CONTACT)** --- Set to the name of the support contact who can be contacted by users upon registration.
5. **JTA: Sender of the email (JTA_UM_SENDER)** --- Set to the sender of the e-mail received by users after registration; for example, set it to your company name.
6. **JTF_UM_APPROVAL_TIMEOUT_MINS** --- Determines the time-out in minutes used by the JTF Approval workflow before a reminder is sent to an approver or the request is rerouted to the next approver. Zero (0) means it never times out.

7. **JTF_PRIMARY_USER** --- Set this profile option to the value of the username which will be the universal primary approver.

13.4.5 Setting up Enrollments

An enrollment is a set of add-on services that users can receive during or after registration. The purpose of an enrollment is to associate with new registrants the required responsibilities, roles, approval definitions, or registration templates determined by your business needs.

Each enrollment can be associated to:

- Enrollment Key, Name and Description
- Responsibility
- Roles
- Application
- Approval processes
- Registration template (not supported by iStore)
- Delegation Role (not supported by iStore)

For more information, see the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User Guide*.

13.4.5.1 Oracle iStore Supports Automatic (Implicit) Enrollments Only

Note that the Oracle iStore user framework supports only automatic (implicit) enrollments.

Automatic enrollments have the following behavior:

- If an approval process has been defined, it is always launched automatically
- When the enrollment does not require approval, the associated responsibility and roles are always assigned automatically
- Since enrollments are tied to user types, the enrollment is assigned implicitly when the user type is approved -- enrollment approval is not required
- Out-of-the-box, all seeded Oracle iStore enrollments are implicit enrollments

Self-Service, Delegation and Self-Service-Delegation application modes are not supported.

If you require enrollments to use approvals, refer to the *Oracle Common Application Components Implementation Guide* for instructions on how to set these up.

13.4.6 Setting up Custom User Types

Implementers can create custom user types using the Oracle CRM System Administrator Console and assigning the user types to roles, a responsibility, and enrollments. Only automatic enrollments are available using Oracle iStore registration. During setup, merchants must associate a registration template to the user type to support Oracle iStore coding guidelines (several registration templates are supplied).

Following are high-level steps to enable a custom user type:

1. In the Oracle CRM System Administrator Console, create a new user type and assign it to the desired application roles and enrollments. Assigning the user type to a responsibility is not mandatory.

When setting up the user type, you must ensure that the user type:

- Is linked to the Oracle iStore application
 - Is **not** self-service enabled
2. Associate to the user type a registration template that is coded according to the Oracle iStore coding guidelines. The template does not necessarily need to be one of the seeded templates.
 3. Set the user type as Active, and it will automatically appear in the registration page without any customization.
 4. Optionally, customize the user type lookup with the new user type key.

See the *Oracle Common Application Components Implementation Guide's* user management chapter for more information.

13.5 User Types Overview

User type definitions are stored and maintained through the Oracle CRM User Management Framework. In general, each user type is tied to an Oracle Applications responsibility. The default responsibility for the Oracle iStore Customer UI is IBE_CUSTOMER.

Roles can be awarded on top of the responsibilities to further control access to the HTML applications. Each HTML application usually has its own set of users within these basic user types.

For additional information, see:

- [Section 13.3.2, "User Type Support Across Applications"](#)
- [Section 13.5.1, "Oracle iStore User Types"](#)
- [Section C.7, "Site Management User Type Definitions"](#)

Each user type in the CRM User Management Framework is associated to:

- User type name, with corresponding key and description
- Default application (Oracle iStore)
- User type registration template that defines the registration flow
- Approval process
- Default role(s) and responsibility

13.5.1 Oracle iStore User Types

In addition to the administrative users described in [Section 4.1.2, "Set up Administrators"](#), Oracle iStore also supports the following customer user types:

- Guest users -- See [Section 13.5.1.1, "Guest Users"](#)
- Business-to-business (B2B) users -- See [Section 13.5.1.3, "B2B Users"](#)
- Business-to-consumer (B2C) users -- See [Section 13.5.1.2, "B2C Users"](#)
- B2B Primary users -- See [Section 13.5.1.4, "Primary Users"](#)
- B2B Reseller users -- See [Section 13.5.1.5, "Reseller Users"](#)

13.5.1.1 Guest Users

Oracle iStore guest users (also called *walk-in* users) can browse Customer UI catalogs and create shopping carts. However, they **cannot**:

- Set up a user profile
- Save a shopping cart
- Share a shopping cart
- Create a shopping list
- Submit an order
- Search or view order details

Walk-in users who visit your specialty sites are automatically logged in with the guest user name. If a guest user makes any changes, such as modifying the preferred language or currency, or adding items to the shopping cart, the changes are saved in the cookie so that different guest users cannot see each other's changes.

See [Section 4.2.1, "Set up Guest User Access"](#), for details on how to implement guest user access.

13.5.1.2 B2C Users

Registered business-to-consumer (B2C) users are individual customers not associated with a company. By default in Oracle iStore, B2C users do not require approval; they are always approved automatically -- however, you can use the Oracle CRM System Administrator Console to set up B2C users to require approval.

Unlike B2B users, for B2C users, out-of-the box you cannot assign roles.

13.5.1.3 B2B Users

Business-to-business (B2B) non-administrative users represent companies whose information is stored in Oracle Trading Community Architecture (TCA). Typically, when non-primary B2B users self-register, they enter a Registry ID created when the first user from that company (the primary user) registered. All B2B user information is stored in the Oracle TCA schema.

Non-administrative B2B users are awarded the business user role by default. See [Section C.5.1, "Business User Role Seeded Permissions"](#), for a list of permissions seeded within the Oracle iStore business user role.

13.5.1.4 Primary Users

Primary users are B2B users who are responsible for creating and managing other users within their companies. Typically, the first user who registers his company in Oracle iStore is considered the primary user. When a primary user registers his organization for the first time, a Registry ID (Organization ID), a primary company financial account, and a primary company address are created in Oracle TCA. This first financial account for the company cannot be changed by the primary user. Subsequent users from the company should use the Registry ID when registering, in order to be associated to the company in Oracle TCA.

See [Section 13.7, "Managing Business Users with Oracle iStore"](#), and [Section C.5.2, "Primary User Role Seeded Permissions"](#), for more information about the abilities of these users.

13.5.1.5 Reseller Users

The seeded IBE_RESELLER_ROLE is appropriate to assign to users who sell your products but are not internal to your company. 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.

13.5.2 User Types for Integrating Applications

Oracle iStore supplies several user types in the Oracle CRM user management framework. See [Section 13.3.2, "User Type Support Across Applications"](#), and [Section C.7, "Site Management User Type Definitions"](#), for details.

See also: [Section 13.4.6, "Setting up Custom User Types"](#)

13.6 Registering Using Oracle iStore

When registering through Oracle iStore, to begin registering, users can select:

- The Register icon at the top right of the Site Selection Page or Site Home Page
- A user registration link on the Oracle iStore Login page -- See [Section 13.3.2, "User Type Support Across Applications"](#), and [Section 13.6.1, "User Type Registration Selections"](#)
- The Register link in the Welcome Bin

Users must complete the required information, and are either immediately approved or must wait for approval before accessing the Customer UI, depending upon the approval mechanisms implemented.

Following registration, administrative B2B -- known as *primary users* -- can fulfill user management functions for their companies in Oracle iStore's Customer UI. These functions can include: approving users, creating new users, assigning accounts, resetting passwords, and awarding and managing user roles. More information on Oracle iStore's user management functionality can be found in [Section 13.7, "Managing Business Users with Oracle iStore"](#), and [Section 13.8, "User and Company Profile Management Overview"](#).

Main topics in this section include:

- [Section 13.6.1, "User Type Registration Selections"](#)
- [Section 13.6.2, "Logging in Through Oracle iStore"](#)
- [Section 13.6.3, "Opting In/Opting Out"](#)

See also: [Section 13.9, "Setting up Self-Service Login Assistance"](#)

13.6.1 User Type Registration Selections

Following is the business flow for users selecting a registration type:

1. The user accesses the registration page using one of the methods described in [Section 13.6, "Registering Using Oracle iStore"](#).
2. In the New User Registration page, users select one of the following hyperlinks, depending upon the type of registration:
 - **Register as individual** -- This link is for registering B2C users.
 - **Register your company** -- This link is for registering a company for the first time. Note that this registers a primary user for the first time. An Organization ID (Registry ID) is created. When the primary user registers his company, the company is registered as a customer of the site where he registers, and the user is created as the primary user for that organization.
 - **Register as a user of an existing company** -- This link is for registering a non-administrative B2B user whose company has already been registered.
 - **Register as a partner** -- This link is for registering an Oracle Partner Management application company that will be accessing Oracle iStore's site management functionality.
 - **Register as a user of an existing partner** -- This link is for registering a partner business user (a user affiliated with the Oracle Partner Management application) whose company has already been registered.

The partner links are not enabled by default. You will only set up the Oracle Partner Management links if integrating with Oracle Partner Management. See [Section 27.2.9, "Registration for Oracle Partner Management Users"](#).

3. Depending upon the type of registration selected and whether your implementation supports integration with Oracle iSupport and/or Oracle Partner Management, several other flows are possible. See [Section F.15, "Sample User Registration Flows"](#), [Section 25.3.8, "Registration for Oracle iSupport Users"](#), and [Section 27.2.11, "Sample Oracle Partner Management User Registration Flows"](#), for more information.

The following figure, [Figure 13–1, "Oracle iStore Registration Page Links"](#), shows the links on the common registration page for Oracle iStore users and users of integrating applications.

Figure 13–1 Oracle iStore Registration Page Links

Registration

* Please select one of the following options and complete the registration forms

- ▶ [Register as individual](#)
- ▶ [Register your company](#)
- ▶ [Register as a user of an existing company](#)
- ▶ [Register as a partner](#)
- ▶ [Register as a user of an existing partner](#)

Remember that out-of-the-box, the Partner registration links are inactive. You must activate these user types in the Oracle CRM System Administrator Console. See [Section 27.2.9, "Registration for Oracle Partner Management Users"](#), the *Oracle Common Application Components Implementation Guide*, and the *Oracle Partner Management Implementation Guide* for more information.

13.6.2 Logging in Through Oracle iStore

Registered users select the Login icon to log in through Oracle iStore. The Login page (ibeCAcdLogin.jsp) displays the user name field, a password field, a Login button, a link to the forgot password feature, and a link to the new user registration page.

For information on the forgot password feature, see [Section 13.9, "Setting up Self-Service Login Assistance"](#).

13.6.2.1 Password Expiration

If a user attempts to log in and his password is expired, the Reset Password screen is launched.

An error message is displayed when the following information is invalid:

- Username is inactive or end-dated
- Password is invalid
- User's account is invalid
- User's organization is invalid or inactivated

Error messages may contain a reference code that the merchant can use to identify the problem.

13.6.3 Opting In/Opting Out

Oracle iStore users can choose whether or not to receive marketing communications based on their registration with Oracle iStore. Users can specify their preference at registration and modify it later in their Profile > Preferences menu.

Note: The **Opt Out** state is assumed unless a user explicitly **Opts In** by selecting the *Please send me e-mail about special offers and products* checkbox and saving the preference (updating the page).

Opt In/Opt Out preferences are stored at the Party level (party_id in TCA schema), using the table, HZ_CONTACT_PREFERENCES.

13.6.3.1 Opt In/Opt Out Checkbox

In Oracle iStore, there are two locations where users can select Opt In/Opt Out preferences:

1. Unregistered user arrives at the Registration page. Or,
2. Registered user navigates to Profile > Preferences.

By default, the opt in/opt out preference checkbox always is *unchecked*.

The label on the checkbox is *Please send me e-mail about special offers and products*, which has the AOL message key, IBE_PREF_OPT_IN_OUT.

13.6.3.2 Table Entry with Explicit User Behavior

Following is the opt in/opt out action in the HZ_CONTACT_PREFERENCES table, according to specific actions on the part of the user:

- **User Explicitly Opts In** --- If the user explicitly elects to Opt In and updates the page, then the Opt In preference is stored automatically in HZ_CONTACT_PREFERENCES table, Preference Code column, as a DO entry.
- **User Explicitly Opts Out** --- If the user elects to Opt Out and updates the page, then the Opt Out preference is stored automatically in HZ_CONTACT_PREFERENCES table, Preference Code column, as DO NOT entry.

13.6.3.3 Table Entry with Creation of New B2B User by Primary User

Primary Users can create/register other B2B users for their companies in Oracle iStore's User Management pages. In this case, no opt in/opt out data is stored for the created B2B user at the time of creation --- when the newly created user logs into the Profile pages for the first time, then the loading of these pages causes a row to be created in the HZ_CONTACT_PREFERENCES table for this user, with an entry of DO NOT in the Preference Code column, and an entry of ALL in the Contact Type column. At this point, the user implicitly is opted out of receiving communications. Only after the user explicitly elects to opt in does the table populate his row with DO in the Preference Code column.

13.7 Managing Business Users with Oracle iStore

This section contains information for managing B2B users in your web sites. Main topics include:

- [Section 13.7.1, "B2B User Management Overview"](#)
- [Section 13.7.2, "Explicitly Approving B2B Users"](#)
- [Section 13.7.3, "Self-Registration Steps for B2B Users"](#)
- [Section 13.7.4, "Oracle iStore B2B User Roles"](#)
- [Section 13.7.5, "Overview of Primary Users and the User Management Pages"](#)
- [Section 13.7.6, "Approval of Self-Registered B2B Users"](#)
- [Section 13.7.7, "Contact Management Page"](#)
- [Section 13.7.8, "Creating B2B Users"](#)
- [Section 13.7.9, "Assigning Roles to B2B Users"](#)
- [Section 13.7.10, "Assigning Sites to B2B Users"](#)
- [Section 13.7.11, "Account Assignment After Approval"](#)
- [Section 13.7.12, "Role Management Page"](#)

See also:

- [Section 13.5, "User Types Overview"](#)
- [Section 13.8, "User and Company Profile Management Overview"](#)

13.7.1 B2B User Management Overview

In a typical setup, primary users manage other business users in their companies. Access to all of the user management screens is provided within the Profile > Administration pages. The Administration screens support the following functionality:

- **Contact and user management** --- See [Section 13.7.7, "Contact Management Page"](#)
- **User approvals** --- See [Section 13.7.2, "Explicitly Approving B2B Users"](#), and [Section 13.7.6, "Approval of Self-Registered B2B Users"](#)
- **Role management** --- See [Section 13.7.9, "Assigning Roles to B2B Users"](#)
- **Account management** -- [Section 13.7.11, "Account Assignment After Approval"](#)

This functionality leverages Oracle TCA schema and the Oracle Common Application Components framework.

Contact and user management functionality provides primary users of a company with the ability to search contacts and users, create contacts and users for their companies, assign roles and sites that have access restricted by responsibilities, and assign accounts for users within their company. If you are integrating Oracle iStore with Oracle Partner Management, partner primary users can define partner profile attributes for a contact.

Both primary and non-primary users can self-register themselves. Once a user has registered, depending on the user type, an approval task will be generated and assigned to an approver. The approver is notified through Oracle Workflow that there are users that require approval. For a list of notification events related to registration, see [Section 34.2.2, "Oracle iStore Seeded Notifications"](#).

Primary users can view all pending approvals assigned to them in the Pending Approval screen, and either approve or reject the requests. If he is a part of an approval group, he will see all pending approvals within his approval group. Once all required approvals are granted, the user will be notified via e-mail and given access to the system.

13.7.2 Explicitly Approving B2B Users

You can set up B2B user registration to require approval or not. If you have set up B2B registration to require approval, then these users must be explicitly approved. An Oracle iStore primary user can approve them by assigning them roles and accounts in the Oracle iStore user management pages.

Users also can be created in the Oracle CRM System Administrator Console. See the *Oracle Common Application Components Implementation Guide* for details.

13.7.3 Self-Registration Steps for B2B Users

Non-administrative and primary B2B users can use the steps below to self-register using Oracle iStore's registration pages.

For Oracle Partner Management steps, see the Oracle Partner Management documentation and [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#).

Note that this flow is the default setup for B2B users registering through Oracle iStore framework. See [Section 13.4, "Ensuring Proper Dependency Setup for User Management"](#), for information about changing the default configuration.

Steps

1. The user navigates to the New User Registration page via one of the methods described in [Section 13.6, "Registering Using Oracle iStore"](#).
2. The user selects the appropriate registration link, as described in [Section 13.6.1, "User Type Registration Selections"](#).
3. The user fills in the required registration data.
4. Optionally, the user checks the Opt In/Opt Out checkbox, *Please send me e-mail about special offers and products*. For more information on opting in/opting out, see [Section 13.6.3, "Opting In/Opting Out"](#).
5. The user submits the registration request. Subsequent activities are different for non-administrative and primary users:
 - a. **For non-administrative users:** Both the primary user for the registering user's company and the user himself receive an e-mail notifying them of the registration request. The primary user's e-mail informs him that the user has requested registration and needs approval or rejection. The registering user's e-mail informs him that his request has been received.

At this point, the user still needs to be approved before he has full access to the Customer UI. The primary user for the user's company can follow the steps in [Section 13.7.6, "Approval of Self-Registered B2B Users"](#), to approve or reject the user.

Following approval, the B2B user receives another e-mail notification informing him that his approval has occurred. If his registration has been rejected, he also receives an e-mail notifying him.

- b. **For primary users:** By default, when this user submits his registration request he is automatically approved and immediately has full primary user permissions in the customer application. See [Section 13.5.1.4, "Primary Users"](#), and [Section 13.7.5, "Overview of Primary Users and the User Management Pages"](#), for more information about the primary user.

Upon approval, a new Registry ID is created for the primary user's company in Oracle TCA schema. To find out his Registry ID, he can log into the Customer UI and navigate to Profile > Company Profile. The Registry ID is also sent to the primary user by e-mail, in the registration confirmation.

A new financial account also is generated for the primary user's company. To find financial accounts available for use, he can navigate to Profile > My Profile > Accounts.

The primary user receives an e-mail notification about his approved registration.

13.7.4 Oracle iStore B2B User Roles

In the context of Oracle iStore, roles typically apply only to B2B users. B2B users can be either regular B2B or primary B2B users. Primary users have administrative abilities, including user management permissions and the ability to update company details in the profile pages. Regular B2B users have view-only permissions in the company Profile pages.

See [Section C.5, "Oracle iStore Customer UI Roles and Permissions"](#), for a list of seeded roles and permissions.

If the seeded B2B user roles do not meet your business needs, you can create new roles with any combination of permissions.

13.7.4.1 Summary of B2B Permissions

You can utilize several B2B user role permissions to control access to specific functionality. For example, there are permissions which control:

- Viewing list prices only, versus viewing net and discount prices -- See [Section C.6.0.32, "IBE_VIEW_NET_PRICE"](#)

- Requesting sales assistance -- See [Section C.6.0.4, "IBE_ASK_SALES_ASSISTANCE"](#)
- Order placement capabilities -- See [Section C.6.0.18, "IBE_CREATE_ORDER"](#)
- Viewing the Checkout button -- See [Section C.6.0.13, "IBE_CHECKOUT"](#)
- Creating bill-to customers, contacts, and addresses -- See [Section C.6.0.14, "IBE_CREATE_BILLTO_CONTACT"](#), [Section C.6.0.15, "IBE_CREATE_BILLTO_CONTACT_ADDRESS"](#), [Section C.6.0.16, "IBE_CREATE_BILLTO_CUSTOMER"](#), [Section C.6.0.17, "IBE_CREATE_BILLTO_CUSTOMER_ADDRESS"](#)
- Creating ship-to customers, contacts, and addresses -- See [Section C.6.0.20, "IBE_CREATE_SHIPTO_CONTACT"](#), [Section C.6.0.21, "IBE_CREATE_SHIPTO_CONTACT_ADDRESS"](#), [Section C.6.0.22, "IBE_CREATE_SHIPTO_CUSTOMER"](#), [Section C.6.0.23, "IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS"](#)
- Creating sold-to customers -- See [Section C.6.0.24, "IBE_CREATE_SOLDTO_CUSTOMER"](#)
- Changing bill-to contacts and customers -- See [Section C.6.0.9, "IBE_CHANGE_BILLTO_CONTACT"](#), [Section C.6.0.10, "IBE_CHANGE_BILLTO_CUSTOMER"](#)
- Changing ship-to contacts and customers -- See [Section C.6.0.11, "IBE_CHANGE_SHIPTO_CONTACT"](#), [Section C.6.0.12, "IBE_CHANGE_SHIPTO_CUSTOMER"](#)
- Allowing customers to bill to or ship to other accounts -- See [Section C.6.0.6, "IBE_BILLTO_ANY_ACCOUNT"](#), [Section C.6.0.27, "IBE_SHIPTO_ANY_ACCOUNT"](#)
- Returning orders -- See [Section C.6.0.19, "IBE_CREATE_RETURN"](#)
- Cancelling orders -- See [Section C.6.0.7, "IBE_CANCEL_ORDER"](#), [Section C.6.0.8, "IBE_CANCEL_ORGANIZATION_ORDER"](#)
- Attaching files to shopping carts -- See [Section C.6.0.28, "IBE_USE_ATTACHMENT"](#)
- Profile pages view and update permissions -- Several common permissions allow the viewing and updating of Profile page information for Oracle iStore Customer UI users, including users associated to Oracle iSupport and Oracle Partner Management applications -- see [Section C.6.0.2, "Common Permissions"](#)
- Primary user permissions --- See [Section C.6.0.39, "IBE_INT_MANAGE_CONTACT"](#), [Section C.6.0.47, "IBE_INT_PRIMARY_USER"](#), [Section C.6.0.50,](#)

["IBE_INT_USER_MANAGEMENT"](#), and [Section C.6.0.48, "IBE_INT_ROLE_MANAGEMENT"](#)

A complete list of the Oracle iStore B2B permissions can be found in [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#).

See the *Oracle Common Application Components Implementation Guide* and the *Oracle Common Application Components User Guide* for instructions on creating new roles and mapping permissions to roles.

13.7.5 Overview of Primary Users and the User Management Pages

Oracle iStore primary users can use the Contact Management and Role Management pages within the Customer UI Profile > Administration menu to create and manage users within their companies.

Rules Regarding Primary User Abilities:

Note: The following rules will not apply, of course, if you have customized your setup to support a primary superuser charged with managing users across organizations.

- By default, a primary user can only perform user management tasks for other B2B users within his company.
- A primary user can only award to others the roles that he possesses.
- A primary user can only assign sites to others that he also can access.
- The primary user can view and assign accounts belonging to his company, even if he is not assigned to them.

13.7.6 Approval of Self-Registered B2B Users

Primary users can access the Pending Approvals page within the Profile > Administration menu to approve or reject the B2B user registrations and enrollments for their companies. See the following for more information:

- [Section 13.7.6.1, "Pending Approvals Page"](#)
- [Section 13.7.6.2, "Approval Types"](#)
- [Section 13.7.6.3, "Conditions for Approving Users"](#)
- [Section 13.7.6.4, "Account Assignment During Approval"](#)
- [Section 13.7.6.5, "Steps to Approve or Reject B2B Users Who Have Self-Registered"](#)

13.7.6.1 Pending Approvals Page

The Pending Approvals page allows primary users to:

- Search for users requesting approval, request names, and approval types
- Approve user registrations and enrollment requests
- Reject user registration and enrollment requests

The pending approval table displays the following information:

- **Request date** -- the date the request was initiated
- **Requester** -- the username of the user requesting approval
- **Request Name** -- registration name or enrollment name of the user type
- **Approval type** -- either user registration or enrollment

13.7.6.2 Approval Types

Approvals displaying in the Pending Approvals page will be one of two types:

- **User Registration** -- This approval is initiated when a user self-registers
- **Enrollment** -- This approval is initiated when an enrollment has been created through the sysadmin console and needs approval

13.7.6.3 Conditions for Approving Users

Following are the conditions for the approvals to display in the Pending Approvals page:

1. Pending approvals display in the Pending Approvals based on the following criteria:
 - Only display approvals assigned to the logged in primary user.
 - Only display approvals of the same company as the logged in primary user.
 - If Approval Groups are being used, only display approvals assigned to the Approval Group (filtered by user's company) of which the logged in user is a part, and only if the user has JTF_PRIMARY_USER_SUMMARY permission. Out-of-the-box, the iStore primary user enrollment already is seeded with a role containing this permission. See [Section 13.4.3.2, "Best Practice: Set up Approval Group"](#), for more information.
 - If Approval Groups are being used, in addition -- if there are any approvals assigned directly to the user -- these are also displayed.

2. Primary users can approve user registrations and enrollments only if they are defined as approvers for their companies, for the approvals defined at the user type and enrollment level.
3. Primary users only have access to the Pending Approvals screen if they are associated to the permission, IBE_INT_PENDING_APPROVAL.

13.7.6.4 Account Assignment During Approval

When approving users, by default, the system will generate an account for the user. The primary user also can assign additional accounts to the user. Oracle iStore also allows primary users to remove accounts from users. See [Section 13.7.6.5, "Steps to Approve or Reject B2B Users Who Have Self-Registered"](#), for steps.

For steps to assign or remove accounts for B2B users in a post-approval scenario, see [Section 13.7.11, "Account Assignment After Approval"](#), and [Section 13.7.11.1, "Removing Accounts from Users"](#).

13.7.6.5 Steps to Approve or Reject B2B Users Who Have Self-Registered

Primary users can use the steps below to approve users within their companies.

For steps B2B users can use to self-register, see [Section 13.7.3, "Self-Registration Steps for B2B Users"](#).

For rejection information, see [Section 13.7.6.6, "Rejecting a Request"](#).

Steps

1. The primary user signs in to the Customer UI and selects a specialty site.
2. The primary user selects the Profile navigation icon. He reauthenticates, if necessary, by signing in again.
3. The primary user selects the Administration subtab, then the Pending Approvals link.
4. The Pending Approvals page displays with a list of pending approval requests, based on a default search criteria.

The request summary table display only requests that are associated to an approval process that the primary user has been assigned to. If the user belongs to an approval group, then pending approvals for the group also are displayed.
5. To approve a pending request, the primary user selects the radio button of the applicable request and then presses the Approve button.

6. If the request type is a user registration and the primary user has pressed the Approve button, the Approve Request page will display the user information and the automatically-assigned account number for the user.
7. If the request type is an enrollment and the primary user has pressed the Approve button, the Approve Request page will display the enrollment information.
8. In the Approve Request page, the primary user can enter comments into the Comments textbox. In the case of an established approval hierarchy, if this user has already been approved by a different approver, the last approver's comments are displayed. If no hierarchy is set up, then no comments by other users are shown.
9. The primary user submits the approval by selecting the Apply button. A confirmation message is displayed. If other approvers are required, a message displays to this effect.
10. If the approval is for a user registration, then the user is created and an e-mail sent to the user notifying him of his approval. If the approval is for an enrollment, then the parameters defined in the enrollment are accomplished, and the primary user(s) are e-mailed about the approval.

13.7.6.6 Rejecting a Request

To reject a pending request, in the Pending Approvals page, the primary user selects the radio button of the applicable request and then presses the Reject button. Comments he enters in the UI are included in the e-mail notification sent to the user.

Upon rejection, the request is removed from the pending requests queue. However, the user still shows up as a contact in the Contact Management page. By assigning roles and accounts to the user, the primary user can move his status from "contact" to "registered user".

13.7.7 Contact Management Page

The Contact Management page within the Profile > Administration menu allows primary users to:

- Create new contacts or users for their companies -- See [Section 13.7.8, "Creating B2B Users"](#)
- Search for users within his company, whether he created them or not -- See [Section 13.7.7.1, "Searching for Contacts and Users"](#)

- Update user contact information and reset passwords -- See [Section 13.7.7.2, "Updating User Details"](#)
- View and modify role assignments -- See [Section 13.7.9, "Assigning Roles to B2B Users"](#)
- Approve or reject user registration requests -- See [Section 13.7.6, "Approval of Self-Registered B2B Users"](#)
- Assign accounts -- See [Section 13.7.11, "Account Assignment After Approval"](#)
- Assign users to specific sites -- See [Section 13.7.10, "Assigning Sites to B2B Users"](#)

The Contact Management page shows the following information in the Contacts Summary table: (Note that the Contact Name, User Name, and Status columns are sortable by selecting the column name header.)

- **Contact names** -- Contact names are combinations of the first and last name of the party as defined in Oracle TCA.
- **User names** -- The list displays all users who are parties belonging to the relationship types "contact of" and "employee of" for the primary user's company.
- **E-mail Addresses** -- The e-mail address entered by the user during registration, or supplied for the user by the primary user, will display.
- **Approval status** -- This column will show either Approved, Rejected, or Pending. It will be empty for a user who is a contact and not yet a user.
- **Status** -- This column, indicates whether the user is active or not, will show either Active or Inactive.
- **Update** -- The Update icon is a link to the contact/user details. The primary user can use the update pages to update contact/user information, and to convert registered contacts into registered users by awarding roles and accounts to them.

Note: In the case of Oracle Partner Management integration, a link to the Partner Profile for partner contacts and users will be provided. Primary users can use the pages within this link to associate the user to a partner profile. The link to PRM pages is shown only when a Contact is selected and the Update Contact/User page is displayed.

13.7.7.1 Searching for Contacts and Users

In the Contact Management page, primary users can search for other contacts or users with their companies. Following are the search options:

- **Contact Name or User Name** -- The Search By LOV can filter the search by contact name or user name. The percent (%) sign can be used as a wildcard in the textbox.
- **Non-registered users filter** -- Selecting the *Show only contacts not registered as users* checkbox limits the search results to only contacts of the company that are not registered as users.

Note that primary users cannot find their own usernames, etc., in the search mechanism.

13.7.7.2 Updating User Details

In the Contact Management page, primary users can select the Update icon for a specific user to update user details for that user. Following is the information the primary user can update:

- **Username and Password** -- If a username is already associated with this user, the primary user can only reset the password, and the username is read-only. If the user is not registered, then the primary user can assign a username and password to the user.
- **Telephone numbers** -- Business and personal telephone and fax numbers are displayed.
- **Default currency** -- This LOV displays for partner users only.
- **Start Date and End Date** -- In the update screen, a start date and (optionally) an end date for the user are displayed.

13.7.8 Creating B2B Users

Primary users can create new B2B contacts for their companies, if they have the IBE_INT_MANAGE_CONTACT permission in their user role.

See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for a list of permissions.

The primary user has the option of creating a contact, or a user. A contact is characterized by contact information only -- no username, password, roles, or responsibilities are awarded. Contacts created belong to the "contact of" relationship type for the primary users's company. When a user is created (with username and

password defined), the party ID of the company is associated with an FND_USER. Users are created as "employee of" the primary user's company.

Steps

1. The primary user signs in to the Customer UI and selects a specialty site.
2. The primary user selects Profile > Administration to retrieve the Contact Management page.
3. The primary user selects Create Contact.
4. The primary user enters the contact information.
5. Depending upon whether he is creating a contact or a user, the primary user selects either Yes or No for the option, *Do you want to register this contact as a user?*
6. If creating a contact, the primary user selects No and then selects Apply to save changes.

Note: To convert a contact to a user, the primary user accesses the Update icon for the user and follows the steps below.

7. If creating a user, the primary user selects Yes and then fills in the user information in the Registration area of the Update Contact page:
 - **User type** -- User selects either Administrator or Business user. When a primary user create a new user with the Administrator user type, the new user receives the standard privileges of this user, as defined by your implementation.

Note that the user types displayed in this page are extensible lookups which you can change. If you create custom user types, you can link them to the lookup and display the user type in this page, so that the primary user can also select the custom user type for the new user, and, therefore, assign the corresponding responsibilities and roles to the user. See [Section 15.6.7, "User Type Lookups"](#), for the lookup seeded values.

 - **Username** -- Should be unique across all users, whether or not they belong to the same B2B organization.
 - **Password** -- When a user is created, the password is set to immediately expire. When the new user logs in, he will be prompted to reset his password.

- **Primary Account** -- Primary user selects the primary account for the new user. If only one account is associated with the company, then only one account will display in the LOV.
- **Default currency** -- (Appears for partner users only) Defines the default currency displayed in the opportunities summary tables.
- **Start date and end date** -- Start date defaults to system date; end date is optional. Note that a username can be end-dated and the contact associated with the record can still be active. End-dated usernames will not be allowed to log in.

Note that the primary user can choose to inactivate the contact and continue creating the user. The user will not be allowed to log in as long as his status is Inactive.

8. The primary user selects Apply to save the changes. The user is automatically approved, and an account number is assigned to him based on the primary account of the primary user. The default business user role and customer responsibility are assigned to the new user. The creation of the user generates the new user approval notification e-mail for the user; the approval e-mail displays username and password.

The user will be asked to enter a new password on attempting to access the Customer UI areas which require sign-in.

9. If integrating with Oracle Partner Management: The partner primary user can select View Profile to launch the partner profile page, where Partner primary users can view and update the contact partner attributes. This button is displayed only if a contact belongs to a partner company and is a primary user for the partner company.

Important: In the case of Oracle Partner Management integration where the user belongs to a partner company, the user must also be created as a CRM Resource. This is required to have this user recognized in the Oracle Sales (OSO) framework. The Resource needs to be assigned to a Resource role and the partner contact Resource needs to be defined as member of the partner company group. To achieve this automatically, Oracle iStore calls an Oracle Partner Management API; there is no need to do this manually.

13.7.9 Assigning Roles to B2B Users

Since the default business user role is automatically assigned when a B2B user is approved, then this procedure would be used to add additional roles to a user. Be sure the primary user granting the roles also has the new roles himself.

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile > Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Roles > Assign Roles.

Note that the roles available for assignment are limited to those not yet assigned to the user but already assigned to the primary user.

3. After marking the desired roles for selection, the primary user presses Select. The user to whom the roles are awarded can immediately utilize those roles.

Note that additional custom roles also can be removed from B2B users, as well as deleted from the application.

13.7.10 Assigning Sites to B2B Users

Primary users can associate other users in their companies to Oracle iStore sites. The sites that a user is associated with initially depend upon the responsibility associated to his user type and sites that have already been restricted by responsibility --- when a site responsibility and a user's responsibility match during registration, the user is assigned to the site.

The permission [IBE_ASSIGN_SITES](#) controls the appearance of this functionality. Partner primary users are not assigned this permission, since Partner Management does not allow manual assignment of sites access, because they assign responsibility programmatically through partner memberships.

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile > Administration.
2. In the Contact Management page, the user selects the Update icon for the user, then selects Sites > Assign Access to launch the Select Sites page, where the primary user can view a list of candidate sites.

Assign sites rules:

- Only sites that have access restrictions by responsibility are displayed in the list of sites for a user. Public (non-restricted) sites are not included in the list, since users can always access these sites, even when they are not assigned the appropriate responsibility.

- Sites available for assignment are limited to those also available to the primary user.
 - The Search and Select Sites page performs a default search on sites assigned to the primary user.
 - If access is removed for a site, the responsibility assignment for the user is end-dated. If this responsibility is also associated to other sites, the user's access to these sites is removed. A warning message is displayed when this occurs.
 - In the case of Oracle Partner Management primary users, these primary users will not have access to this page, since the access to the partner sites is controlled through membership.
3. After marking the desired sites for selection, the primary user presses Select to apply the assignments.

13.7.11 Account Assignment After Approval

Account creation is not explicitly supported in Oracle iStore. No user can create accounts. Accounts are automatically generated by default, when users are approved. Primary users assign accounts to business users at approval time or through the Contact Management screens after approval.

Note: The primary user can assign all accounts for his company, even if the accounts are not assigned to him.

Use the following steps to assign accounts to Oracle iStore B2B users after approval.

For steps to assign accounts during approval, see [Section 13.7.6.4, "Account Assignment During Approval"](#), and [Section 13.7.6.5, "Steps to Approve or Reject B2B Users Who Have Self-Registered"](#).

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile > Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Accounts > Assign Accounts. The accounts displayed are all those available and active for the company. The primary user will not be able to select account numbers already assigned to the user.
3. After marking the desired accounts for selection, the primary user presses Select to apply the selection.

Note that a user must possess at least one account number to complete transactions.

13.7.11.1 Removing Accounts from Users

To remove accounts from users within his organization, the primary user can do the following:

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile > Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Accounts. All assigned accounts display for the user.
3. To remove an account, the primary user selects the Remove icon for the account number. A warning message is displayed, the primary user must confirm the remove action.

13.7.12 Role Management Page

The Role Management pages let primary users:

- View available roles and role permissions
- Create new roles and assign permissions to these roles
- Create, modify, and delete custom roles

13.7.12.1 Creating and Updating Custom Roles

Primary users can create new roles and assign permissions to these roles. Following are points of behavior:

- The permissions assigned to custom roles can be altered.
- After creation, the name and description of custom roles are non-changeable.
- Seeded roles cannot be altered.
- New custom roles are automatically assigned to all the primary users of the company.

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile > Administration > Role Management > Create Role.

2. The primary user enters a name for the role, optionally enters a description, and moves the desired permissions to the Assigned Permissions window.

Note that only those permissions assigned to the primary user will be available for him to select. For a complete list of permissions, see [Appendix C, "Seeded User Data"](#).

3. The primary user selects the Apply button to save the changes. A confirmation message is displayed.

13.7.12.2 Removing Roles from Users

To remove roles from users within his organization, the primary user can do the following:

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile > Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Roles. All assigned roles display for the user.
3. To remove a role, the primary user selects the Revoke icon for the role. Note that no warning is given before the revoke action.

13.8 User and Company Profile Management Overview

User and company information (for example, names, addresses, and phone numbers) is stored in the profile pages of the Oracle iStore Customer UI. Profile pages allow users to view, change, and maintain their user information. In the case of B2B users, access to their company's profile pages allows them to view organizational information, such as Organization ID/Registry ID, web site address, annual revenue, and a list of administrators -- and primary users of the company are allowed to update such data.

Profile page data is stored on the backend in the Oracle customer model, Oracle TCA.

B2B access to many of the profile pages can be controlled through permissions within a user's role. See [Section 13.8.3, "Configuring Profile Menus"](#), for more information.

Note: By default, any user registering using *Register as individual*, *Register your company*, and *Register as a user of an existing company* user types will receive the same level of Profile page permissions in Oracle iStore.

13.8.0.3 Integration with Other Oracle Applications

Two important aspects of the profile pages are their consistent look and feel between integrating applications and their ability to be configurable by application. For example, if you are integrating Oracle iStore with Oracle iSupport and/or Oracle Partner Management, your end-users' profile pages will access a common set of screens provide by Oracle iStore, plus allow you to customize your own display of a subset of the profile screens. This customization ability is provided through Oracle iStore Template Manager -- since each profile page is derived from an Oracle iStore template, you can configure the display of the profile pages to suit your business needs.

For users of the integrating applications, the profile pages present and allow updating of personal and company information whether the users are logged into Oracle iStore, Oracle iSupport, or Oracle Partner Management.

See the following subsections for more information:

- [Section 13.8.1, "Personal Profile Pages"](#)
- [Section 13.8.2, "Company Profile Pages"](#)
- [Section 13.8.3, "Configuring Profile Menus"](#)

For integrating applications' information, see:

- [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#)
- [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#)

13.8.1 Personal Profile Pages

The following sections describe the personal profile pages accessible through the Profile navigation icon:

- [Section 13.8.1.1, "Personal Information Profile Page"](#)
- [Section 13.8.1.2, "Contact Information Profile Page"](#)
- [Section 13.8.1.3, "Payment Book Profile Page"](#)
- [Section 13.8.1.4, "Accounts Profile Page"](#)
- [Section 13.8.1.5, "Preferences Profile Page"](#)

See also: [Section 13.8.2, "Company Profile Pages"](#)

Note: All information in this section related to storage of Oracle TCA data is relevant only to B2B users. B2C users' information is always stored at the person party ID level.

13.8.1.1 Personal Information Profile Page

Within the Details link of the Personal Information page, users can record and update their own personal details, including:

- **Name** -- This information is stored under HZ_PARTIES in Oracle TCA schema.
- **E-mail address** -- Address entered will be the primary e-mail address for the user; stored under contact point of the party in Oracle TCA schema.
- **Password** -- Users can reset their passwords in this screen.

Note on SSO Integration: If Oracle Single Sign-On (SSO) is enabled, this page will only display and allow update of the user's name and e-mail address -- password reset is provided through SSO; see [Chapter 32, "Integrating Oracle iStore with Oracle Single Sign-On"](#), for more information.

Note on Partner Management Integration: If integrated with Oracle Partner Management, two submenus display within the Personal Information page: Details and Profile. The Details page contains the functionality listed above, while the Profile page allows partners to update their profiles. The Profile link is enabled only for users possessing the required permissions (for example, those belonging to a partner company and associated to a partner profile).

13.8.1.2 Contact Information Profile Page

The Contact Information page contains three submenus: Address Book, Email Address, and Phone Book:

- **Address Book** --- Users can create, update and delete addresses in the Address Book page. Address information is stored in HZ_LOCATIONS, is associated to a party site in HZ_PARTY_SITES, and for B2B users is linked to the party ID or party relationship ID (Registry ID) in HZ_PARTIES.

Note on Address Usages: Oracle iStore supports only creating billing or shipping address usage types; however, other usages created in other applications (for example, a delivery address) will display and show their correct usage in Oracle iStore. Users can identify whether an address is preferred for that usage or not.

- **Address creation** --- When B2B users create a billing or shipping address, it is related to the company. The primary address is defaulted into the

shopping cart. For information on the fields that display for each country's address entry, see [Section 2.6.1, "Setting up Country Address Formats"](#).

- Preferred addresses -- Users can flag one billing and one shipping address as preferred. Oracle iStore then uses the preferred addresses when data is defaulted into shopping carts during checkout. Note that if a new address is created and marked as preferred, the previous preferred address is unmarked as preferred.
- Deleted addresses --- Deleted addresses are end-dated in the database, not actually removed.
- **Email Address** --- Users can create new e-mail contact points, or update existing e-mail contact points. Functionality is provided to allow users to set a primary e-mail address. If a primary e-mail address already exists and a user marks a new one as primary, the current primary e-mail address is unchecked and the new one becomes primary. If only one e-mail address is created, it is set as primary by default. Users also can select whether they prefer to receive an e-mail in HTML or text format. If not specified by the user, the primary e-mail address is the e-mail address first used during registration. Users can delete a primary e-mail address if they create another one and mark it as primary.
- **Phone Book** --- Users can create new telephone number contact points, or update existing telephone number contact points. Functionality is provided to allow users to specify the type of number entered, such as mobile, fax, business, or home number, and to specify the country code used in the number. Users are allowed to flag one number as the primary number. Users can delete a primary telephone number if they create another one and mark it as primary.

13.8.1.3 Payment Book Profile Page

In the Payment Book, users can create, update, and delete preferred credit card information. Oracle iStore validates the credit card information upon entry. The preferred credit card is used in defaulting in the checkout phase. Credit card information is stored in Oracle Accounts Receivable schema, in AP_BANK_ACCOUNTS. Credit cards potentially can be org-stripped. If a user deletes a credit card marked as primary and then creates a new credit card, the new card number will be marked as primary automatically.

13.8.1.4 Accounts Profile Page

For B2B users, Oracle iStore supports multiple financial accounts per user. Users can view accounts in the Accounts page. Users also can see and switch accounts in the

Welcome Bin in the Customer UI. Only *active* accounts assigned to the user are displayed, as stored in the HZ_CUST_ACCOUNTS table.

Oracle iStore allows users to set a primary account in the Accounts page. The primary account is used as the default account for any transactions performed in the Customer UI. If the user does not explicitly assign a primary account for himself, then Oracle iStore uses as primary the account assigned during registration for the user (with the first account number created taking precedence).

The account used during a user's session is called the *session account*. B2B users with multiple accounts can switch session accounts in the Customer UI pages through the Welcome Bin. Switching session accounts can allow a customer to complete and view transactions associated to other accounts. The session account for a B2B user is used at checkout and in viewing order details. However, even if an account number is used by the application as the account number for the user's login session, the user still must explicitly mark an account number as primary before it will be stored in TCA as the user's primary account number.

Note that because they do not have multiple accounts, B2C users will not see the Accounts page, nor will they be able to switch accounts in the Welcome Bin.

See [Section 6.4.1.3, "Welcome Bin"](#), for more information on the Welcome Bin.

13.8.1.5 Preferences Profile Page

The Preferences page allows users to set communication preferences, orders preferences, and more.

Important: The Preferences page may include links to Sales and Support pages, if integrating with Oracle iSupport or Oracle Partner Management, and the user has the required permissions.

Following are the Preferences pages within the Profile menu:

General Preferences --- This link always displays, regardless of any integration with other applications. The following options are available:

- **Date format** -- A drop-down menu allows the user to select a date format for dates displaying shopping cart expiration values.
- **Preferred language for e-mail communications** -- This preference sets the preferred language for e-mail notifications and enables smooth functioning of the Workflow directory. The preferred language is stored in the HZ_PERSON_LANGUAGE table. Initially, the language is the one defaulted during registration from the user's session language.

- **Marketing preferences** -- Users can choose whether to receive marketing communications. More information on this functionality can be found in [Section 13.6.3, "Opting In/Opting Out"](#).

Order Preferences --- This link always displays, regardless of any integration with other applications. The following options are available:

- **Order Preferences** --- Users can select a preferred support level and a preferred shipping method. Users also can create shipping and billing addresses to be used when placing orders. Note that if a B2B user changes a shipping or billing address and there is no value in the Contact column, this means that the address is a *company* address and not a *personal* address.
- **Express Checkout Preferences** --- The Enable Express Checkout checkbox allows users to turn on or off express checkout. Note that users must first set up preferred shipping and billing addresses and record valid credit card data in the Express Checkout Preferences area before express checkout will function properly. The preferred shipping method set in the Order Preferences page is used as the default shipping method for express checkout. If express checkout is enabled and the preferred shipping method is not selected, a warning message displays, telling the user to select a preferred shipping method.
- **Support Preferences** --- Provided by Oracle iSupport, this page allows users to select subscriptions, indicate preferred days to receive e-mails, and set the user signature for forums. A user must have the required permissions to see this page. See [Section 13.8.3, "Configuring Profile Menus"](#), [Section C.9, "Site Management Profile Pages Permissions"](#), and the Oracle iSupport documentation for more information.
- **Sales Preferences** --- Provided by Oracle Partner Management, this page allows partner users to set opportunities, forecasts, and partner and general preferences used in Oracle Partner Management applications.

See [Section 13.8.3, "Configuring Profile Menus"](#), [Section C.9, "Site Management Profile Pages Permissions"](#), and the Oracle Partner Management documentation for more information.

13.8.2 Company Profile Pages

The following sections describe the company profile pages accessible through the Profile navigation icon.

Note that in the case of integration with Oracle iSupport or Oracle Partner Management, B2B and partner users can access the same company profile screens, whether logging in from iStore, iSupport, or Partner Management.

- [Section 13.8.2.1, "Company Information Page"](#)
- [Section 13.8.2.2, "Contact Information Page"](#)
- [Section 13.8.2.3, "Administrators Page"](#)
- [Section 13.8.2.4, "Channel Team Page"](#)
- [Section 13.8.2.5, "Memberships Page"](#)

Note: All information in this section related to storage of Oracle TCA data is relevant only to B2B users. B2C users' information is always stored at the person party ID level.

13.8.2.1 Company Information Page

Business and partner users (if Oracle Partner Management is integrated) can view company details in this page, if they have the permission IBE_INT_ORG_DETAILS in their user role.

Note that B2B users with the IBE_INT_UPDATE_ORG_DETAILS permission in their user roles can also update the company details information. See [Section C.9.3, "Permissions for Company Pages"](#), for more information.

The following is displayed for company information:

- **Company Name** --- The company name is stored as the party name of party type "organization", in HZ_PARTIES.
- **Registry ID** --- This read-only field displays Registry ID (Organization ID) in the Oracle TCA schema. Registry ID is stored as party number in HZ_parties, for the party of type "organization". All B2B users can view Registry ID. This would be useful, for example, if primary users need to communicate this information to non-primary users who wish to register.
- **Annual Revenue** --- This field, updateable by primary users with the required permission, shows annual revenue of the company.
- **Currency** --- Primary users can select a currency to associated to the annual revenue entry. The currency drop-list will show all currencies enabled in Oracle General Ledger, along with the description of each currency.
- **Total Employees** --- This field, updateable by primary users with the required permission, shows total employees in the company.
- **Year Established** --- This field, updateable by primary users with the required permission, shows the year the company was established.

- **Web site** --- This field, updateable by primary users with the required permission, indicates the website URL of the customer's company. If defined, the website icon is enabled and user can select the icon and launch the website in a new browser window.

Important: In the case of integration with Oracle Partner Management, the Profile link also appears, allowing access to partner profile attributes. (Partner profile attributes are configurable at implementation time; see the Oracle Partner Management documentation for details.) B2B and partner primary users can update the company details and the partner profile attributes if assigned the appropriate permission -- see [Section 13.8.3, "Configuring Profile Menus"](#), and [Section C.9, "Site Management Profile Pages Permissions"](#). Non-primary users should not be assigned this permission.

13.8.2.2 Contact Information Page

In the Contact Information page, business and partner users (if Oracle Partner Management is integrated) can view the company address book, e-mail addresses, phone numbers, and telex numbers.

Notes Regarding This Functionality:

- "View" permissions for company contact information are awarded through the following permissions: IBE_INT_ORG_DETAILS, IBE_INT_ORG_ADDRESS_BOOK, IBE_INT_ORG_EMAIL_ADDRESSES, IBE_INT_ORG_PHONE_NUMBERS, and IBE_INT_ORG_TELEX_NUMBERS.
- Only B2B users with the IBE_INT_MANAGE_CONTACT_INFO permission can create, update, and delete addresses and company contact points. Users without this permission will not see the corresponding create, update, and delete functionality.
- Note that with addresses, *preferred* and *primary* have different meanings -- *preferred* is a user-defined preference for use, while *primary* is associated to the usage of the company address in Oracle TCA. When a company's primary user registers the company for the first time, the address he uses as the company address is marked as the primary address for the company.
- One primary identifying address must always be available in the corporate address book. Users are never allowed to delete the primary company address, and the Delete icon is disabled for the primary identifying address.
- See [Section C.6.0.1, "Oracle iStore-Specific Permissions"](#), and [Section C.6.0.2, "Common Permissions"](#), for lists of B2B permissions and descriptions.

Contact information includes:

- **Company addresses** --- Displays address information of the company. The address list displays all addresses associated to the party organization, regardless the usage of the address. Displayed are:
 - Address -- The address list displays all addresses associated to a user's party, regardless the usage of the address. At least one address needs to be defined as primary for the company. To update or delete an address, users with the required permission will be able to access the Update and/or Delete icon in the address table row. See also: [Section 13.8.1.2, "Contact Information Profile Page"](#)
 - Address type -- Stored in HZ_PARTY_SITE_USES, this field displays all the business purposes of the address and indicates whether they are primary or not. See also: [Section 13.8.1.2, "Contact Information Profile Page"](#)
 - City, state and zip code
 - Country -- The country selection determines the address style the user needs to follow when creating a new address. For information on the fields that display for each country's address entry, see [Section 2.6.1, "Setting up Country Address Formats"](#).
- **Company e-mail addresses** --- Business and partner users can view, update and create new e-mail addresses for a company if they have the correct permission in their user roles. Users are allowed to set a primary e-mail address. If a primary e-mail address already exists and a user marks a new one as primary, the current primary e-mail address is unchecked and the new one becomes primary. If only one e-mail address is created, it is set as primary by default. Users also can select whether they prefer to receive e-mail in HTML or text format.

Note that e-mail addresses created for B2B users are not the same as those created for a company.
- **Company phone and telex numbers** --- Business and partner users can view, update, delete, and create new phone and telex numbers for a company.

13.8.2.3 Administrators Page

Business and partner users can view the list of their company administrators, if they have the permission IBE_INT_ADMINISTRATORS. The list of administrators includes only those users who are primary users of a company. See [Section 13.8.3, "Configuring Profile Menus"](#), [Section C.9, "Site Management Profile Pages Permissions"](#), and [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#).

13.8.2.4 Channel Team Page

Partner users can view the list of channel managers assigned to their companies, if they have the permission, PV_CHANNEL_TEAM, in their user roles. This screen is provided by Oracle Partner Management, and this link is provided only if your implementation is integrated with Oracle Partner Management. See [Section 13.8.3, "Configuring Profile Menus"](#), [Section C.9, "Site Management Profile Pages Permissions"](#), and the Oracle Partner Management documentation for more information.

13.8.2.5 Memberships Page

Partner users can view the list of partner programs related to their companies, if they have the permission, PV_VIEW_MEMBERSHIPS, in their user roles. This link is provided only if your implementation is integrated with Oracle Partner Management. See [Section 13.8.3, "Configuring Profile Menus"](#), [Section C.9, "Site Management Profile Pages Permissions"](#), and the Oracle Partner Management documentation for more information.

For a list of permissions that control access to these pages, see [Section C.9, "Site Management Profile Pages Permissions"](#).

13.8.3 Configuring Profile Menus

Oracle iStore's user framework allows you to configure the user Profile and user management menus to suit your business needs. This flexibility is useful for implementers who wish to control access to specific screens by specific user types and for users of different applications.

Access to functionality within each screen is controlled through roles associated with each user. Each permission within a user role is associated to a function which renders a portion of a menu. Roles are collections of privileges, and by creating custom roles and then limiting the permissions within these roles, administrators can control access to page elements. In addition, the menu rendering framework supports syntax which can restrict or allow users by users type (B2B or B2C).

At runtime, Oracle iStore's menu rendering framework filters out all functions to which the user has no access.

13.8.3.1 Supported Access Control Scenarios

Each function linked to the Profile menus can have specific levels of access control. Oracle iStore supports the access control scenarios shown in the following table,

[Table 13–1, "Web HTML Syntax for Profile Access Control Setups"](#). This table also shows the syntax to use for web HTML functions in the supported scenarios.

Table 13–1 Web HTML Syntax for Profile Access Control Setups

Case	Scenario	Web HTML Syntax for Functions
1	No permission check	a.jsp
2	No B2C users can access the page Only some B2B users (with correct permissions) can access the page	a.jsp?pcc=<permission_code>&utc=b2b
3	All B2C users can access the page B2B users (with correct permissions) can access the page	a.jsp?pcc=<permission_code>&utc=b2c
4	All users (regardless of B2C or B2B) with specific permissions can access the page	a.jsp?pcc=<permission_code>

13.8.3.2 Implementation Guidelines

Use the following guidelines to assist your setup:

1. In order for the Oracle iStore menu rendering framework to know which permission and which user type is linked to each function, each function should append the permission code and user type to its web_html definition. See [Table 13–1, "Web HTML Syntax for Profile Access Control Setups"](#), for supported scenarios and syntax. For security reasons, when the Oracle iStore framework renders the menu, it hides the permission code in the UI.
2. Profile menus are consistent across all sites, regardless of which responsibility is associated to the site. Therefore, if you configure the Profile menus, the configuration will affect all of your sites.
3. You cannot entirely turn off a user’s ability to see some Profile information. At a minimum, users will be able to see the My Profile menu within the Profile area.
4. Common screens associated to common permissions (those with INT in their names) can be assigned to Oracle iStore, Oracle iSupport and Oracle Partner user roles.
5. Profile screens that are application-specific should only be associated to permissions and roles owned by the integrating applications. For example, only Oracle iStore users who have been granted the business user role can access the

company profile screens. Only Oracle iStore users that have been granted the primary user role can access the administration screens.

6. All Profile pages are identified as secure pages.

For a complete list of permissions which control the user and company profile page access, see [Section C.9, "Site Management Profile Pages Permissions"](#).

13.8.3.3 Steps to Configure Profile Menus

You may use the following steps to configure the profile menus for different responsibilities. For complete information on Oracle Applications menus functionality, see the *Oracle Applications System Administrator's Guide*.

1. Using Oracle Applications (FND) menus functionality, create a new profile menu tree.
2. Link the profile menu to the user menu of the responsibility, IBE_CUSTOMER.
For performance reasons, the profile menu root must be set up directly under the responsibility menu root, at the second level of the entire menu tree.
3. Set the profile option, IBE: Use Profile Menu, at site level to the new profile root menu (see [Section A.7.0.66, "IBE: Use Profile Menu"](#)). This will override the seeded Oracle iStore profile menus attached to IBE_CUSTOMER responsibility.

13.9 Setting up Self-Service Login Assistance

If customers forget their user names or passwords, they can select the *Forgot Your Username/Password information?* link in the Login page to retrieve their login information. Oracle iStore Alert Workflow sends the seeded Forgot Password e-mail notification to the user with his username and password.

Important: If your implementation is integrated with Oracle Single Sign-On (SSO), then the password assistance feature is provided through the SSO server. In this case, Oracle iStore's Forgot Password e-mail notification is not used. See [Chapter 32, "Integrating Oracle iStore with Oracle Single Sign-On"](#), for more information.

13.9.1 Self-Service Login Assistance Process Flow

Following is the process flow for Self-Service Login Assistance:

1. User selects the *Forgot your Username/Password information?* link in the Login page. The Login and Password Assistance page opens.

In this page, the customer can enter:

- Username only
- E-mail address only
- Username and e-mail address

Note that if Oracle iStore cannot find a unique match for either username or e-mail address, then the user must enter both values.

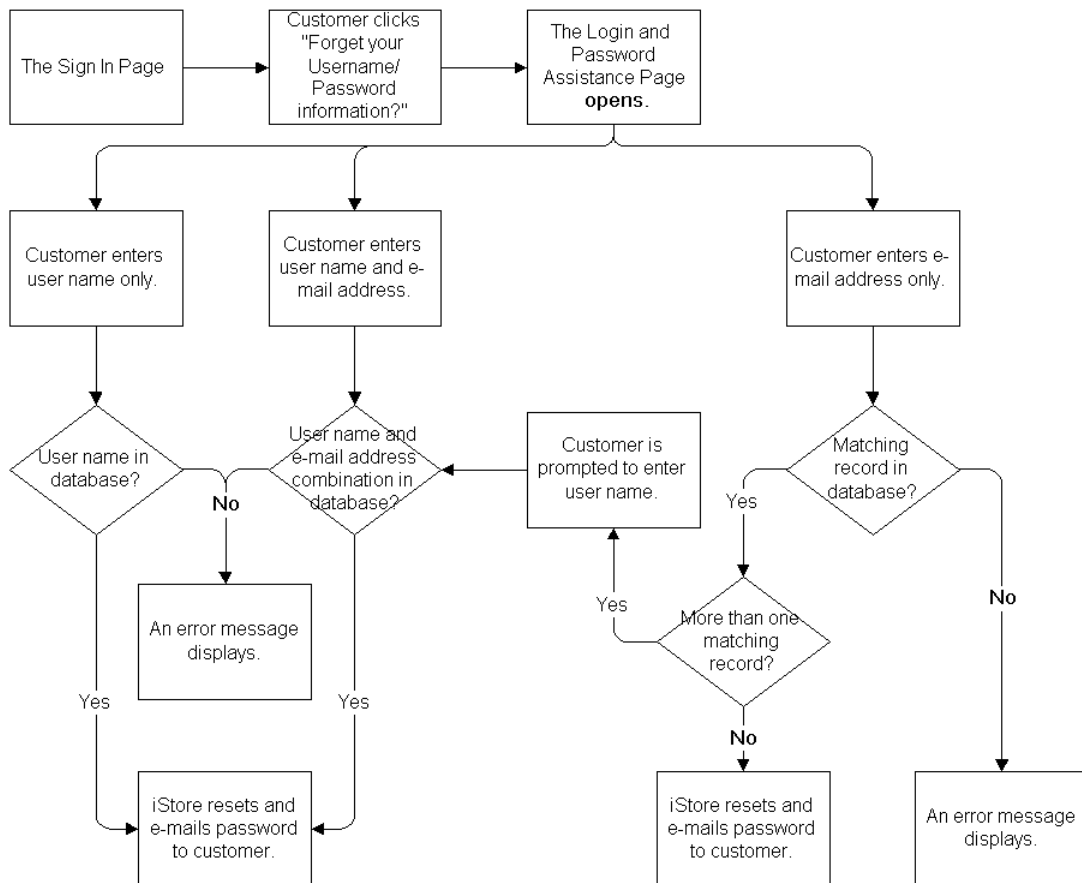
If a user does not remember either username or e-mail addresses, he must contact the site administrator to reset the password.

2. User submits the request.

- If the user has entered username only, Oracle iStore validates the username in the database. If a record of the user name exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If a record of the user name does not exist, an error message displays.
- If the user has entered username and e-mail address, Oracle iStore validates the user name and e-mail address combination in the database. If a record with the combination exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If a record with the combination does not exist, an error message displays.
- If the user has entered an e-mail address only, Oracle iStore validates the e-mail address in the database. If only one record with the e-mail address exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If no record with the e-mail address exists, an error message displays.

If more than one record with the e-mail address exists, the application prompts the customer to enter a username. The application then validates the user name and e-mail address combination in the database. If the combination exists, the application resets the password and e-mails it to the customer. If the combination does not exist, an error message displays.

The following diagram, [Figure 13–2, "Process Flow for Self-Service Login Assistance"](#), shows the process flow that Oracle iStore follows to retrieve a user's login information.

Figure 13–2 Process Flow for Self-Service Login Assistance

See [Chapter 15, "Implementing Messages and Prompts"](#), for details on how to access and modify the messages associated with this process.

Implementing Customer Assistance

This chapter describes how to implement Oracle iStore 11i's customer assistance features.

Main topics in this chapter include:

- [Section 14.1, "Customer Assistance Features Overview"](#)
- [Section 14.2, "Sales Assistance"](#)
- [Section 14.3, "Call Me Back Assistance"](#)

14.1 Customer Assistance Features Overview

Oracle iStore provides mechanisms that allow customer assistance in your specialty sites. These include:

- **Sales Representative Assistance** --- See [Section 14.2, "Sales Assistance"](#).
- **Call Me Back Assistance** --- See [Section 14.3, "Call Me Back Assistance"](#).

14.2 Sales Assistance

During the checkout process, users can request assistance from a sales representative to help them finalize their orders. Using the sales assistance feature is optional.

For Sales Assistance functionality, implement Oracle Quoting. Without Oracle Quoting, sales representatives will be unable to view carts that have become quotes when customers request Sales Assistance -- nor will sales representatives be able to update quotes and have the changes appear to customers in specialty sites. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.

This section contains:

- [Section 14.2.1, "Sales Assistance Business Flow"](#)
- [Section 14.2.2, "Implementing Sales Assistance"](#)

Note: You can control a B2B customer's ability to request Sales Assistance at the user role level, by adding or removing the permission, IBE_ASK_SALES_ASSISTANCE. See [Section C.6.0.4, "IBE_ASK_SALES_ASSISTANCE"](#), for more details.

14.2.1 Sales Assistance Business Flow

Sales assistance events proceed as follows:

See [Section 12.3.7, "Requesting Assistance or Rejecting T&Cs with Shared Carts"](#), for information on this functionality with shared carts.

This flow assumes that the IBE: Use Sales Assistance Feature profile option has been enabled.

1. A user logs into a specialty site.
2. The user browses the catalog, creates a shopping cart, activates a saved shopping cart, or views a published quote.
3. The user proceeds to checkout.
4. In the Review Order Details and Confirm page, the user selects the Need Salesrep Assistance button. Note that B2B users must have the [IBE_ASK_SALES_ASSISTANCE](#) in their user role to request assistance.
5. The *How can we assist you in finalizing your order?* page opens. If the cart is not saved, Oracle iStore prompts the user to save the shopping cart with a name, according to these rules:
 - a. If the cart is not a saved cart or published quote, the user must save the cart.
 - b. For saved carts and published quotes, existing names will display on the page; the customer will not be able to change the name.
6. The user must choose from a list of reasons why he needs assistance, and enter comments. The sales representative can view these comments in the quote's Notes section. The user contact information is displayed.

Note that these reasons are extensible lookups which can be changed; see [Section 15.6.1, "Sales Assistance Reasons Lookups"](#), for details.
7. The user submits the request by selecting the Submit Request button.

8. Oracle iStore displays the confirmation page, Request Sales Assistance Confirmation.

This page informs the user that his request has been received and that a sales representative will contact him. The page also shows the quote number, and summarizes the cart or quote details, including any shipping and payment information entered.

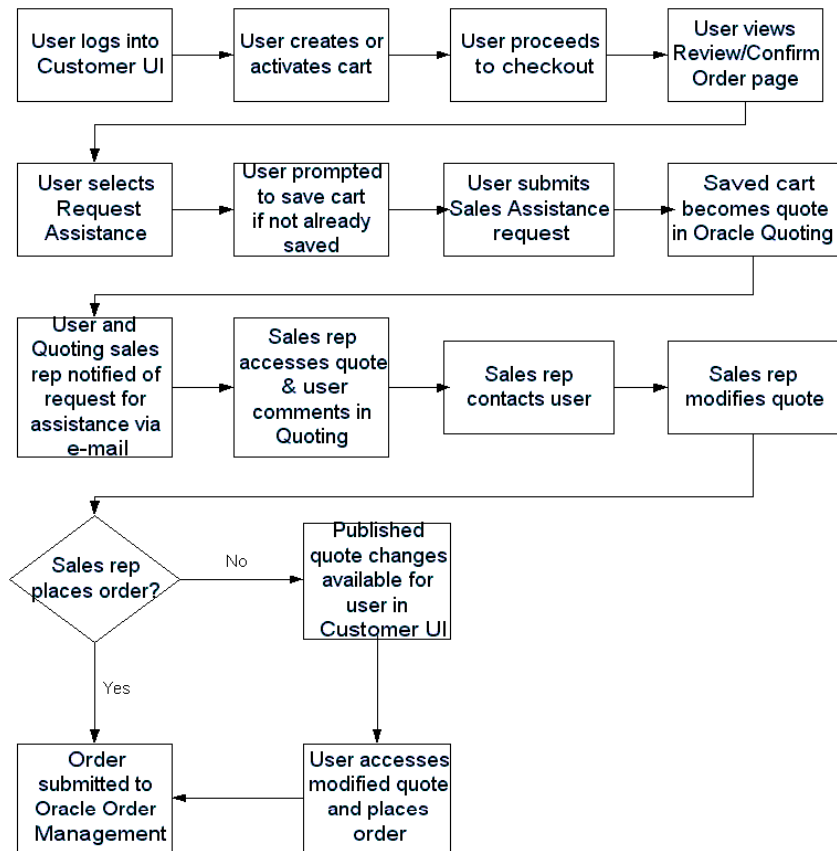
Note: When a user submits a sales assistance request, T&Cs are not attached to the quote. In this scenario, only when the order is placed are the T&Cs attached.

9. The user can access the quote in the My Quotes subtab under the Cart menu, and place the order if desired.
10. Using Oracle Workflow, Oracle iStore sends an e-mail notification to the user notifying him that his request has been received.
11. The Oracle iStore cart becomes a quote in Oracle Quoting.
12. Oracle iStore sends the sales representative an e-mail notification about the user's request for assistance. The user's comments are included in the e-mail sent to the sales representative.

Note: The sales representative receiving the e-mail notification depends upon whether automatic sales representative assignment is set up through Oracle Territory Manager, and the value of the profile option, ASO: Default Salesrep. See [Section A.14.0.116, "ASO: Default Salesrep"](#), for more information.

13. The sales representative can then contact the user and provide the necessary assistance. Then, if desired, he can access the quote in Oracle Quoting, view comments in the Notes section. If he modifies the quote, the changes are viewable by the user in the specialty site.
14. Anytime a quote has a status with a valid transition **to** the quote status, Order Submitted, the user can submit the quote as an order. See *Oracle Quoting Implementation Guide* for information about quote statuses and status transitions. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information on the integration between Oracle iStore and Oracle Quoting.

The following figure, [Figure 14–1, "Oracle iStore Sales Assistance Process Flow"](#), shows the process flow.

Figure 14–1 Oracle iStore Sales Assistance Process Flow

14.2.2 Implementing Sales Assistance

To set up the Sales Assistance feature, follow these steps:

- [Section 14.2.2.1, "Step 1 - Verify Oracle Quoting Integration"](#)
- [Section 14.2.2.2, "Step 2 - Verify Oracle Workflow Integration"](#)
- [Section 14.2.2.3, "Step 3 - Set Sales Assistance Profile Options"](#)
- [Section 14.2.2.4, "Step 4 - Ensure B2B User Permissions"](#)

14.2.2.1 Step 1 - Verify Oracle Quoting Integration

See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), and the *Oracle Quoting Implementation Guide* for details.

14.2.2.2 Step 2 - Verify Oracle Workflow Integration

See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), and the *Oracle Workflow Guide* for details.

14.2.2.3 Step 3 - Set Sales Assistance Profile Options

When you are ready to activate the Sales Assistance feature, set the following profile options:

- **IBE: Use Sales Assistance Feature** --- This profile option specifies whether Sales Assistance is enabled in your specialty sites. Set to Yes to enable the feature. See [Section A.7.0.69, "IBE: Use Sales Assistance Feature"](#).
- **ASO: Default Quote Status** --- Set this to Store Draft at the iStore application level. See the Oracle Quoting documentation for more information on quote statuses. See [Section A.14, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#).
- **ASO: Default Salesrep** --- Set this to the default sales representative name, unless using territory-based sales representative assignment. See [Section A.14.0.116, "ASO: Default Salesrep"](#), for more information.

14.2.2.4 Step 4 - Ensure B2B User Permissions

Verify that the B2B users who will be requesting assistance have the [IBE_ASK_SALES_ASSISTANCE](#) in their user role.

14.3 Call Me Back Assistance

Oracle iStore's Call Me Back feature allows you to offer your customers Call Me Back Assistance. With the callback feature, users can select a link in the Welcome Bin to request that a merchant representative call them back.

This section provides an overview of the call-back functionality in Oracle iStore.

For information related to the applications that provide the underlying technology for the Call Me Back feature, consult relevant Call Center Technology product documentation on [OracleMetaLink](#).

This section includes:

- [Section 14.3.1, "Call Me Back Business Flow"](#)
- [Section 14.3.2, "Implementing Call Me Back"](#)

14.3.1 Call Me Back Business Flow

The business flow for the Call Me Back functionality is:

1. In Oracle iStore, a customer selects the Call Me Back link in the Welcome bin.
2. Once the call-back entry is made by the user, Oracle iStore sends the request to the CCT server group specified during implementation.
3. Oracle iStore calls the CCT APIs to provide the list of available call center server groups.
4. The CCT applications and hardware route the request to the Universal Work Queue (UWQ) server.
5. The UWQ server decodes the customer information (the Notes module captures comments from user) and assigns it to the UWQ client, and the call request immediately pops up in an agent's screen in Oracle Customer Care.

14.3.2 Implementing Call Me Back

To set up the Call Me Back feature, follow these steps:

- [Section 14.3.2.1, "Step 1 - Ensure Setup of Dependencies"](#)
- [Section 14.3.2.2, "Step 2 - Set Profile Option"](#)

14.3.2.1 Step 1 - Ensure Setup of Dependencies

The web call-back requires implementation of:

- CRM Interaction Center (formerly Call Center Technology - CCT) suite
- Oracle Universal Work Queue (UWQ)
- Oracle Customer Care
- Oracle CRM Foundation, Notes module

The purchase of call center hardware also is required.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products which enable the Call Me Back functionality in Oracle iStore.

14.3.2.2 Step 2 - Set Profile Option

Once the dependencies listed above are installed and functioning properly, set the profile option, IBE: Use Call Me Back at the application level for Oracle iStore. See [Section A.7.0.55, "IBE: Use Call Me Back"](#), for more information.

Implementing Messages and Prompts

This chapter provides an overview of the tasks required to configure and customize Oracle iStore 11i message text and message prompts.

Main topics in this chapter include:

- [Section 15.1, "Site Text Messages Overview"](#)
- [Section 15.2, "Modifying Text Messages"](#)
- [Section 15.3, "Site-Specific Messaging"](#)
- [Section 15.4, "Oracle iStore Login Page Messages"](#)
- [Section 15.5, "Self-Service Login Assistance Messages"](#)
- [Section 15.6, "Modifying Oracle Application Object Library Lookups"](#)

15.1 Site Text Messages Overview

In Oracle iStore, the Customer UI pages display various messages. The text for most of the messages comes from the Oracle Applications Message Dictionary (AOL). Each Message Type or Message Name in AOL is associated to a single block of content for every supported language. Oracle iStore ships with hundreds of seeded AOL messages and associated seeded message text for the Customer and Site Administration UIs. The seeded text can be found in the FND_NEW_MESSAGES table.

Several of the AOL text messages are seeded as media objects in the Site Administration Media Objects pages. See [Section 9.3.1, "Using Media Objects to Present Message Text"](#), for details.

The following table, Site Administration and Customer UI Seeded Text Messages Sample, lists a few examples of seeded message text for the Customer and Site Administration UIs.

Table 15–1 Site Administration and Customer UI Seeded Text Messages Sample

Message Name	Message Text	User Interface	Context
IBE_M_ADD_PRODUCTS_LBL	Add products to the section	Site Administration UI: Product Catalog	Description for adding products to a section page
IBE_M_CONFIRM	Are you sure?	Site Administration UI	Confirmation message for deleting a site
IBE_PRMT_EXPRESS_CHKOUT_PREF_G	Express Checkout	Customer UI: Personal Information Profile Pages	Text that appears on top of Personal Information Page
IBE_PRMT_WELCOME_G	Welcome	Customer UI: Welcome Message Bin	Text that appears in the Welcome Message Bin

15.2 Modifying Text Messages

The seeded messages text may not meet your business requirements, and you may want to change the default text. Use the following procedure to change the text of an Oracle Application Object Library (AOL) message.

Note that text content imbedded against an AOL prompt cannot be deleted. A new FND prompt should be created if new text needs to be added to a prompt, or the prompt should be deleted and a new one created. If a prompt is deleted, bounce the server in order for the existing message attached to the prompt to be removed from the Customer UI.

For instructions on how to find the name of a specific message, see [Section 15.2.1, "Locating Text in JSPs"](#), below.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility and select Application > Messages. The Messages window opens.
2. Choose View > Find. The Messages search window opens.

3. All seeded Oracle iStore text messages begin with the product code, IBE. In the Find field, enter IBE% and select Find. Your search results display in the Messages search window.
4. Select the message that you want to modify and select OK. The Messages window is populated with the selected message.
5. Modify the message text for the appropriate language.
6. It is recommended that you bounce the Apache server after making any message text changes.

15.2.1 Locating Text in JSPs

It may be cumbersome for you to locate specific messages found in the Customer or Site Administration UI. To simplify the process, you can find a specific message name by viewing the source code of the JSP file displaying it. Use the following procedure to locate AOL message text found in the Oracle iStore JSPs.

Prerequisites

UNIX account and access to the OA_HTML directory

Steps

1. In the Customer UI, navigate to a page containing message text. For example, navigate to the Site Home Page (ibeCZzpHome.jsp) that displays the Welcome Bin.
2. From the browser menu bar choose View > Source.
3. Search for the text you wish to locate.
4. In the source file, search for the JSP that correlates to the bin containing the associated message.
 - For example, the Welcome text is found in the ibeCAcdWelcome.jsp.
5. Log onto the application server and navigate to the OA_HTML directory. Once here, do a search for the `ibe*.jsp` that you are looking for.
 - In the Welcome example, locate ibeCAcdWelcome.jsp.
6. Open the JSP file and locate the AOL Message Name that correlates to the text you are looking for.
 - In the Welcome example, the AOL Message name is IBE_PRMT_Welcome_G.

7. Modify the message if desired, using the steps in [Section 15.2, "Modifying Text Messages"](#).

15.2.2 Translating Message Text

Specialty site text messages, prompts, and labels can be translated into 37 different languages. If you have properly installed and implemented multiple languages, the seeded content will be translated automatically. However, if you have modified the seeded messages, then you will need to manually translate the text, prompt, or label.

For example, the Welcome Bin has the default text in American English -- *Welcome*. If Spanish has been properly implemented as an additional language, then the seeded text *Welcome* is automatically translated to *Bienvenido* in the Spanish site. If the seeded content has been altered, then the translation will not happen automatically and must be configured manually.

For information on implementing multiple languages, see [Section 2.4.1, "Multi-Language Setup \(MLS\)"](#).

To manually translate message text, see [Section 15.2, "Modifying Text Messages"](#).

15.3 Site-Specific Messaging

In addition to translating messages and customizing default text for messages, you can also display different messages for particular types of sites. For example, a single Oracle iStore implementation may have three different sites that are active. In this example, one of the three sites is a B2B site which allows customers to place an order by faxing a purchase order. The other two sites are B2C sites and do not accept purchase orders. The B2B site, then, must have a specific text message that communicates this functionality in the Customer UI.

In Oracle iStore it is possible to map specific messages to specific sites using the Site Administration UI's media object functionality. The site-specific message is created and saved as an HTML file. Then, the new message (HTML file) is added as a source file for a media object and mapped to a particular site using the Site Administration UI.

- See [Section 9.3, "Understanding Media Objects"](#), to learn how to map media objects.
- See [Section 9.3.1, "Using Media Objects to Present Message Text"](#), for a list of the media objects that can be used to present messages.

- [Section 9.3.4, "Assigning Content Items to Media Objects"](#), contains steps to associate content items (files) to media objects.

15.3.1 Creating Custom Site Messages

You can add custom messages for sites using the Oracle Applications Message Dictionary, the Oracle iStore media objects functionality, and the Java API `DisplayManager.getTextMediaOrFndMsg()`.

Use the following procedure to add a custom message.

Prerequisites

- Create an HTML file with the desired text message.
- If you are storing your media source files in the file system, place the HTML file in the `/OA_MEDIA` directory.
- If you are storing your media source files in the database, upload the HTML file to the database or place it in your local directory for upload during the procedure.

Steps

1. Create the default message in Oracle Applications Message Dictionary as follows:
 - a. Log in to Oracle Forms with the Application Developer responsibility.
 - b. Choose Application > Messages. The Messages window opens.
 - c. Create a new message. The Oracle convention for an Oracle iStore message name begins the name with **IBE**.
 - d. Create translations if necessary.
 - e. Save the message.
2. In Oracle iStore, create a media object with the same programmatic access name as the Oracle Applications Message Dictionary message name. See [Section 9.3, "Understanding Media Objects"](#), for instructions.
3. Add the HTML source file to the media object as described in [Section 9.3.4, "Assigning Content Items to Media Objects"](#). Use the following guidelines:
 - Map the HTML file to the specialty site where you want it to appear.
 - Do not set the HTML file as the default source file.

4. In the JSP that should display the message, use the `DisplayManager.getTextMediaOrFndMsg()` API to call the message.
- For example, if the message name is `IBE_STORE_WELCOME` and you want to display it in your sites' home pages (`ibeCZzpHome.jsp`), you would add the following API call in the common section page, `ibeCCtdCmnSt.jsp`:
- ```
DisplayManager.getTextMediaOrFndMsg("IBE_STORE_WELCOME")
```

You can use the "get msg" API in any JSP that is not a processing page, using the programmatic name of the message from Forms.

## 15.4 Oracle iStore Login Page Messages

Oracle iStore is seeded with Oracle Applications (AOL) Message Dictionary messages for both B2B and B2C user registration. These messages display in the Login page to label the links to the B2B and B2C registration pages, if the corresponding registration types are enabled by the setting of the profile options discussed earlier in this chapter (IBE: Use Business to Customer Features and IBE: Use B2B Features).

Oracle iStore is also seeded with a Login page message to display for returning users. You can change the text of the seeded messages.

The following table summarizes the seeded Login page messages.

**Table 15-2 Oracle iStore Login Page Messages**

| Message Function                      | Message Name         | Seeded Text                                                                     |
|---------------------------------------|----------------------|---------------------------------------------------------------------------------|
| Label for B2B registration link       | IBE_PRMT_BIZ_REG_MSG | If you are representing your business or organization, click above to register. |
| Label for B2C registration link       | IBE_PRMT_IND_REG_MSG | If you are an individual or consumer, click above to register.                  |
| Link to self-service login assistance | IBE_PWD_FORGET       | Forgot your Username/Password information?                                      |

## 15.5 Self-Service Login Assistance Messages

The prompts in the Login and Password Assistance page are seeded Oracle Applications Message Dictionary messages. Oracle iStore also uses Oracle

Applications Message Dictionary messages when it sends an e-mail with a customer's login information after the customer uses self-service login assistance. These messages are listed in the following table.

The following table, Self-Service Login Assistance Messages, shows the Self-Service Login Assistance messages that are seeded in the Customer UI.

**Table 15–3 Self-Service Login Assistance Messages**

| Message Name          | Description                                                               | Seeded Text <sup>1</sup>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IBE_PWD_EMAIL_BODY    | The body of the e-mail sent to users with their login information         | <p>Dear &amp;0,</p> <p>You are receiving this email because we recently received a request to e-mail your login information to you.</p> <p>You do not have to respond to or act on this email.</p> <p>Your account details are given below:</p> <p>Username: &amp;1</p> <p>Password: &amp;2</p> <p>As a security measure you should change your password immediately after logging on.</p> <p>IMPORTANT: Do not reply to this email. If you need to contact us, send an email to storehelpers_us@oracle.com.</p> <p>We appreciate your interest with us.</p> <p>Customer Care</p> |
| IBE_PWD_EMAIL_SUBJECT | The subject line of the e-mail sent to users with their login information | Login information assistance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| IBE_PWD_HELP_FOOTER   | Tells customers who to contact for additional help                        | If you need additional help regarding your login information, feel free to send email to storehelpers_us@oracle.com. We will be happy to assist you.                                                                                                                                                                                                                                                                                                                                                                                                                              |

<sup>1</sup> The strings preceded by an ampersand (&) are dynamically replaced with user-specific information by Oracle iStore.

You must modify the messages IBE\_PWD\_EMAIL\_BODY and IBE\_PWD\_HELP\_FOOTER to change the seeded e-mail address storehelpers\_us@oracle.com to your own site administrator's e-mail address.

## 15.6 Modifying Oracle Application Object Library Lookups

Oracle Application Object Library lookups (FND\_LOOKUPS) provide some of the lists of values in the Customer UI and the Site Administration UI. The modifiable LOVs and their lookup names include:

- **Sales Assistance Prompts** --- IBE\_SALES\_ASSIST\_REASONS\_LK. See [Section 15.6.1, "Sales Assistance Reasons Lookups"](#).
- **Shared Cart Access Levels** --- IBE\_QUOTE\_UPDATE\_PRIVILEGE. See [Section 15.6.2, "Share Cart Roles Lookups"](#).
- **Media Object and Content Component Classes** --- IBE\_M\_MEDIA\_OBJECT\_APPLI\_TO. See [Section 15.6.3, "Media Objects and Content Components Classes Lookups"](#).
- **Site Group Names** --- IBE\_M\_SITE\_GROUP. See [Section 15.6.4, "Site Group Names Lookup"](#).
- **Return Reasons** --- See [Section 15.6.5, "Returns Reasons Lookup"](#).
- **Order Tracker Search Lookup** --- See [Section 15.6.6, "Order Tracker Search Lookup"](#).
- **User Type Lookups** --- See [Section 15.6.7, "User Type Lookups"](#).

You can change the values of the names and descriptions for these lookups by using the following procedure.

### Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose Application > Lookups > Application Object Library. The Application Object Library Lookups window opens.
3. Choose View > Find. The Lookup Types search window opens.
4. Query for the lookup which you are modifying.
5. In each row of the Application Object Library Lookups window, you can add a lookup code as follows:
  - a. In the Code field, enter the lookup code.
  - b. In the Meaning field, enter a meaning for the lookup code.
  - c. In the Description field, enter a description for the lookup code. This is the description that will show up in the Customer UI drop down list.



- d. Optional: In the From and To fields, select the effective dates for the lookup code.
  - e. Check the Enabled checkbox.
6. Save the form.

### 15.6.0.1 Disabling Lookups

To disable a lookup code, end date it and uncheck the Enable flag for the code.

## 15.6.1 Sales Assistance Reasons Lookups

Customers can request help from a sales representative through iStore's Sales Assistance feature. You can use AOL to activate and set up the list of reasons for needing assistance that customers choose from when using the Sales Assistance feature. You accomplish this by setting up lookup codes with meanings for the AOL lookup type IBE\_SALES\_ASSIST\_REASONS\_LK.

The following table, Oracle iStore Sales Assistance Seeded Prompts, shows the five seeded Sales Assistance Prompts that Oracle iStore ships with.

**Table 15–4 Oracle iStore Sales Assistance Seeded Prompts**

| Message Name             | UI Prompt Content    |
|--------------------------|----------------------|
| IBE_SA_FIN_OPTIONS       | Financing Options    |
| IBE_SA_MORE_PRODUCT_INFO | More Product Info    |
| IBE_SA_OTHERS            | Others               |
| IBE_SA_PRODUCT_AVAIL     | Product Availability |

For more information on Oracle iStore's Sales Assistance feature, see [Section 14.2, "Sales Assistance"](#) in [Chapter 14, "Implementing Customer Assistance"](#).

## 15.6.2 Share Cart Roles Lookups

Site administrators can change the seeded names and descriptions for shared cart roles. You accomplish this by changing lookup codes with meanings for the AOL lookup type, IBE\_QUOTE\_UPDATE\_PRIVILEGE.

See [Section 12.3.3, "Shared Cart Roles"](#), for the seeded values.

### 15.6.3 Media Objects and Content Components Classes Lookups

Site administrators can change the class designations for the media objects and content components in the Site Administration UI. To do this, you must modify the lookup, IBE\_M\_MEDIA\_OBJECT\_APPLI\_TO.

The following table, Seeded Media Object and Content Component Classes, shows the seeded classes for these items:

**Table 15–5 Seeded Media Object and Content Component Classes**

| Access Level Name   | Description                                                               |
|---------------------|---------------------------------------------------------------------------|
| Product             | For media objects or components applicable to product display             |
| Section             | For media objects or components applicable to section display             |
| Section and Product | For media objects or components applicable to section and product display |
| Message             | For media objects applicable to message display                           |
| Logo                | For media objects applicable to logo display                              |
| Others              | For all other classes                                                     |

### 15.6.4 Site Group Names Lookup

Oracle iStore’s site management functionality allows you to categorize specialty sites into groups. The specialty sites then display in the Site Selection Page according to the group(s) in which they belong. The names of the groups are extensible lookups which you can alter according to your business needs. You also can disable the groups. To do this, you must modify the lookup, IBE\_M\_SITE\_GROUP.

When you create a new group lookup or alter an existing group lookup in Oracle Forms, the changes appear immediately in the Store Administration UI, but you need to bounce the server for the changes to be visible in the Customer UI.

The following table, Site Group Names, shows the seeded groups:

**Table 15–6 Site Group Names**

| Site Group Name | Description                               |
|-----------------|-------------------------------------------|
| Store Sites     | A group for Oracle iStore specialty sites |

**Table 15–6 Site Group Names**

| Site Group Name | Description                                           |
|-----------------|-------------------------------------------------------|
| Support Sites   | A group for Oracle iSupport specialty sites           |
| Partner Sites   | A group for Oracle Partner Management specialty sites |

### 15.6.5 Returns Reasons Lookup

In Oracle iStore's Returns pages, you can modify the LOV that displays the reasons a user is returning an order. The name of the Return Reasons lookup is IBE\_RETURN\_REASONS\_LOOKUP.

The seeded reasons are:

- Damaged Product
- Wrong Product

**Important:** When entering new lookup values, you must use values that exist in the lookup, CREDIT\_MEMO\_REASON. This is an Oracle Receivables lookup. If you do not use one of these values, and a user submits a return using an invalid reason, the return will fail.

You also can modify the values displayed in the Returns search mechanism. See [Section 15.6.6, "Order Tracker Search Lookup"](#).

### 15.6.6 Order Tracker Search Lookup

In Order Tracker's Track Orders page, the search utility lookup is displays as Orders in Last Days. The same lookup is used for Orders, Invoices, Payments, and Returns queries.

Following is the data:

- Lookup Name --- IBE\_QUERY\_ORDERS\_RANGE\_LOOKUP
- Description --- Lookup for defining data range to query orders
- Values --- 7, 14, 30, 60, 90 days
- Default value --- 7 days

Note that the search will default to the lookup's first entered value.

If you have set up values with decimals, Oracle iStore rounds off this value, before displaying the results. For example, 1.5 would be treated as 1 and search results would be returned for 1 day.

## 15.6.7 User Type Lookups

The lookups for user types are as follows:

- **Oracle iStore/Oracle iSupport user types lookup** --- IBE\_UM\_STORE\_USER\_TYPES. Seeded values:
  - Business --- IBE\_BUSINESS
  - Administrator --- IBE\_PRIMARY
- **Oracle Partner Management user type lookup** --- IBE\_UM\_PARTNER\_USER\_TYPES. Seeded values:
  - Business --- IBE\_PARTNER\_BUSINESS
  - Administrator --- IBE\_PARTNER\_PRIMARY

---

# Implementing Reports

This chapter describes how to implement and use Oracle iStore 11*i* Reports and Bins.

Main topics in this chapter include:

- [Section 16.1, "Overview of Oracle iStore Reports"](#)
- [Section 16.2, "Implementing Oracle iStore Reports"](#)
- [Section 16.3, "Using the Bins Dashboard"](#)
- [Section 16.4, "Setting Bin Preferences"](#)
- [Section 16.5, "Setting up E-mail Delivery for Reports"](#)
- [Section 16.6, "Oracle iStore Business Reports Details"](#)
- [Section 16.7, "Oracle iStore Operational Reports Details"](#)
- [Section 16.8, "Understanding Oracle iStore Reports Architecture"](#)
- [Section 16.9, "Oracle iStore Reports Lookup Types"](#)

## 16.1 Overview of Oracle iStore Reports

Oracle iStore features pre-defined business and operational reports that collect and present valuable data about your sites and your customers.

**Business Reports and Bins** present the following data:

- Number of orders placed for a given time period
  - **Note:** Orders must be in **Booked** state before they appear in Oracle iStore reports.
- The types of users making purchases and the top customers

- Top product sales for specific time periods
- Number of shopping carts converted to orders

**Operational Reports and Bins** present the following data:

- Product assignment and published/unpublished status reports
- Section assignment and published/unpublished status reports

Drawing on Oracle Discoverer 4i and Oracle iStore Dashboard Reports and Bins, the reports are presented within the Site Administration UI Reports tab. Integration with Oracle Workflow allows you to configure e-mail notification of two of the reports.

Using Oracle iStore Reports is optional.

Oracle iStore reports are of three types:

- Oracle iStore Dashboard Reports and Bins
- Oracle Discoverer 4i Reports
- E-Mail Notifications

**16.1.0.1 Business Reports Overview**

The table below, Business Reports in Oracle iStore, summarizes the business reports and their available formats.

**Table 16–1 Business Reports in Oracle iStore**

| Report Name                     | Dashboard Report/Bin | Discoverer Report | E-Mail Notification |
|---------------------------------|----------------------|-------------------|---------------------|
| Top Product Sales Report        | Yes                  | Yes               | No                  |
| Customer Sales Report           | Yes                  | Yes               | No                  |
| Top N Orders Report             | Yes                  | Yes               | Yes                 |
| Site Order Summary Report       | Yes                  | No                | Yes                 |
| Sales by Agreement Report       | No                   | Yes               | No                  |
| Shopping Cart Conversion Report | No                   | Yes               | No                  |
| Sales by End User Type Report   | No                   | Yes               | No                  |

### 16.1.0.2 Operational Reports Overview

The table below, Operational Reports in Oracle iStore, summarizes the operational reports and their available formats.

**Table 16–2 Operational Reports in Oracle iStore**

| Report Name                                             | Dashboard Report/Bin | Discoverer Report | E-Mail Notification |
|---------------------------------------------------------|----------------------|-------------------|---------------------|
| <a href="#">Unassigned Products Report</a>              | No                   | Yes               | No                  |
| <a href="#">Assigned Products Report</a>                | No                   | Yes               | No                  |
| <a href="#">Products by Site Report</a>                 | No                   | Yes               | No                  |
| <a href="#">Products Excluded by Site Report</a>        | No                   | Yes               | No                  |
| <a href="#">Unpublished Products Bin</a>                | Yes                  | No                | No                  |
| <a href="#">Sections With Site Assignment Report</a>    | No                   | Yes               | No                  |
| <a href="#">Sections Without Site Assignment Report</a> | No                   | Yes               | No                  |
| <a href="#">Sections With Site Exclusion Report</a>     | No                   | Yes               | No                  |
| <a href="#">Empty Sections Report</a>                   | No                   | Yes               | No                  |
| <a href="#">Unpublished Sections Bin</a>                | Yes                  | No                | No                  |

All of the reports except those delivered through e-mail notifications are accessible in the Reports tab of the Oracle iStore Site Administration UI. E-Mail delivery is configured in the Reports > Email Report menu and utilizes seeded Oracle iStore Notification Events to mail the reports to users' e-mail inboxes.

Descriptions of each report can be found in [Section 16.6, "Oracle iStore Business Reports Details"](#), and [Section 16.7, "Oracle iStore Operational Reports Details"](#).

## 16.2 Implementing Oracle iStore Reports

Reports in Oracle iStore leverage the following:

- Oracle General Ledger Calendar
- Oracle Order Capture and Oracle Order Management data tables
- Oracle iStore fact tables and related concurrent program

- Oracle iStore materialized views and related concurrent program
- Oracle iStore Order Facts Sources lookup types
- Oracle iStore Data Out Bins, which use the Oracle DCF framework
- Oracle iStore Dashboard Reports
- Oracle iStore Notification Events
- Oracle Discoverer 4i application
- Oracle Workflow iStore Reports

The following are required to successfully set up the Oracle iStore Reports:

- [Section 16.2.1, "Set up Calendar in General Ledger"](#)
- [Section 16.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 16.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 16.2.4, "Set Conversion Rates"](#)
- [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#)
- [Section 16.2.6, "Verify Discoverer Implementation"](#)

Optional setup steps are covered in:

- [Section 16.3, "Using the Bins Dashboard"](#)
- [Section 16.5, "Setting up E-mail Delivery for Reports"](#)

## 16.2.1 Set up Calendar in General Ledger

You must create a single calendar in Oracle General Ledger (GL) with the periods types: Day, Week, Month, Quarter, and Year, in order for the Reports to work.

Or, if you do not want to add all of these periods to the GL calendar, for reporting purposes you can create a separate calendar for iStore in GL with the needed period types.

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

## 16.2.2 Set up Oracle Discoverer 4i for Use in Oracle iStore

Oracle Discoverer 4i is a required dependency for Oracle iStore's Reports. This section contains Oracle iStore-specific steps required for Oracle Discoverer 4i implementation.



**Note:** iStore Discoverer Reports are available only from Minipack 11i.IBE.M and onwards.

---

**Important: Before beginning Discoverer setup:**

Read [OracleMetaLink](#) Note 185342.1, *Oracle Discoverer End User Layer (EUL) Release Notes*.

**To obtain Note 185342.1:** Log into [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and query with **Note 185342.1** in the search utility to retrieve the note.

---

- [Step 1 - Ensure Application of Oracle iStore Release Minipack 11i.IBE.M or Oracle Applications Release 11.5.8](#)
- [Step 2 - Set up Oracle Discoverer for Oracle 11i Applications](#)
- [Step 3 - Post Installation Steps - Specific to iStore Setup](#)
- [Step 4 - Test iStore Discoverer Reports](#)

### **16.2.2.1 Step 1 - Ensure Application of Oracle iStore Release Minipack 11i.IBE.M or Oracle Applications Release 11.5.8**

Ensure that you have applied either Oracle iStore Release Minipack 11i.IBE.M or Oracle Applications Release 11.5.8. This will ensure that all of the database objects, seed data, and Discoverer eex files for the Oracle iStore Reports are installed.

### **16.2.2.2 Step 2 - Set up Oracle Discoverer for Oracle 11i Applications**

Please follow the steps mentioned in the [MetaLink](#) Note 185342.1 for generic setup steps.

### **16.2.2.3 Step 3 - Post Installation Steps - Specific to iStore Setup**

1. Grant **EUL User Edition** privileges to the Oracle iStore Administrator (manager) responsibility.

**Example:** Grant privileges to responsibility, iStore Administrator.

### **Steps**

- a. Log in to Oracle Discoverer 4i Administration Edition using the database username, password, and database created in [Section 16.2.2.2, "Step 2 - Set up Oracle Discoverer for Oracle 11i Applications"](#), above.

**Example:** Log in as EUL4\_US/EUL@customDB.

- b. Open the Privilege dialog box using Tools > Privileges.
- c. In the Privileges tab, from the LOV select the application responsibility to which you are granting the privileges.

**Example:** Select iStore Administrator from the LOV.

- d. Select checkboxes for the following privileges:

--- User Edition ---

--Create/Edit Query

--Collect Query Statistics

--Item Drill

--Drill Out

--Grant Workbook

--Save workbooks to database

- e. Select Apply to save changes.

#### 16.2.2.4 Step 4 - Test iStore Discoverer Reports

This section details how to test that you have properly set up the Discoverer Reports for Oracle iStore.

**Important:** Before you begin testing, you will need to bounce the Apache port. This is necessary to reload the site-level profile options.

##### 16.2.2.4.1 Testing on Discoverer Viewer

Use the following steps to test the iStore Discoverer Reports on Discoverer Viewer.

1. Connect to the following URL:

`http://<discoverer server>:<port>/discoverer4i/viewer/`

2. Log in using:

**User Name** = `ibe_admin:` (Note the ":" at the end of the apps username.)

**Password** = <enter the appropriate password>

**Database** = <database> *For example:* CustomDB

**Language** = <select from language list>

3. After logging in, select the iStore Administrator responsibility hyperlink.
4. Ensure that you are connected to the correct EUL:
  - a. Select the Options menu.
  - b. Check the current EUL from the End User Layer Access section.  
If the EUL is not correct, change it, and select Apply to save changes.
5. You should see a list of the available iStore Discoverer reports. To view any of the reports, select the appropriate hyperlink.

#### **16.2.2.4.2 Testing on iStore Site Administration UI**

Use the following steps to test the iStore Discoverer Reports in the iStore Site Administration UI:

1. Log in to the Site Administration UI as a user with the iStore Administrator responsibility.
2. Navigate to the Reports tab.
3. Select Discoverer Reports. You should see a list of six reports on the page.

In this page, if you see the message: `Post installation/Configuration steps are required to correctly run the reports`, then please verify that you have followed all of the steps mentioned above, and bounce the Apache port.

The cause for this message can also be viewed by looking at the source of the JSP page. The possible error would be prefixed and suffixed with the string `ERROR LOG:`.

Also, you may be able to refer to the error message and Discoverer profile setting details which are logged into the IBE middle-tier log files.

4. Select any of the report hyperlinks to launch the desired report.

### **16.2.3 Set iStore Profile Options for Reports**

Set the following required IBE profile options for Oracle iStore Reports:

#### **iStore Profile Options**

- IBE: Currency Code
- IBE: GL Conversion Type

- IBE: GL Period Set Name

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

- IBE: Enable Force Refresh
- IBE: Enable Parallel Data Extraction for Reporting
- IBE: iStore Materialized Views Usage
- IBE: Quarter Begin Data
- IBE: Truncate Records
- IBE: YTD Data Availability in Bins

See [Section A.10, "Reports Profile Options"](#), for profile option descriptions and setup procedures.

## 16.2.4 Set Conversion Rates

Oracle iStore can have business transactions from multiple sites, each of which can support multiple currencies. This results in the Oracle iStore Reports functionality compiling business reports from transactions in multiple currencies. These currencies must be resolved to a single currency for Oracle iStore Reports.

The Oracle iStore Reports currency is specified at three different stages:

- The currency for the fact tables is determined by the profile options, IBE: Currency Code and IBE: GL Conversion Type, and the daily currency conversion rate in Oracle General Ledger. See [Section 16.2.3, "Set iStore Profile Options for Reports"](#), for more information.
- The currency for the Data Out Bin fact tables is determined by the lookup, iStore Reporting Currencies (IBE\_ECR\_REPORTING\_CURRENCY). See [Section 16.9, "Oracle iStore Reports Lookup Types"](#), for more information.
- The currency for the Data Out Bins is determined by the user when setting bin preferences. See [Section 16.4, "Setting Bin Preferences"](#), for more information.

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

## Steps

1. Log in to Oracle Forms with the General Ledger Super User responsibility.
2. Choose Setup > Currencies > Rates > Daily. The Daily Rates window opens.
3. Review or enter your desired currency conversions, using the following guidelines:
  - There should be a line for every currency conversion that you need, for every date for which the Oracle iStore Reports will request data.
  - The From fields should have the currencies in which your sites provide transactions.
  - The To fields should contain the value for the currency that you want the fact tables to use. This value is the same as the setting of the profile option IBE: Currency Code.
  - The values in the Conversion Type fields should equal the value of the profile option IBE: GL Conversion Type.

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

4. Save your changes.

For more information on setting currency conversion rates, see *Oracle General Ledger User's Guide*.

## 16.2.5 Prepare Data (Run Concurrent Programs)

Two sets of concurrent programs populate the Oracle iStore Reports' fact tables and materialized views with data:

- **iStore Reports Complete Data Refresh Set** -- Refreshes data for entire time-frame specified; provides completely updated, accurate data, but may be very time consuming due to the amount of data refreshed.
- **iStore Reports Increment Data Refresh Set** -- Adds only data for the time period between the last data refresh and your new desired end date; much faster, but may not be accurate if the unrefreshed data has changed since it was last captured.

See below for steps on how to run these seeded concurrent program sets.

Each of these program sets contains the following three concurrent programs:

1. **iStore Reports Fact Tables Refresh** - Pulls data that is within a certain user-specified time-frame from Oracle Order Capture and Oracle Order Management data tables into the Oracle iStore fact tables, which act as data summaries.
2. **iStore Reports Materialized Views Refresh** - Refreshes materialized views of the Oracle iStore fact tables
3. **iStore Alert Reports** - Triggers delivery of the reports that are available as e-mail notifications.

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

---

#### 16.2.5.1 iStore Reports Complete Data Refresh Set

This program set refreshes data for the entire time-frame specified and provides completely updated, accurate data, but may be very time consuming due to the amount of data refreshed. If you require a less time-consuming refresh, use the iStore Reports Increment Data Refresh Set.

The beginning date of this program set is controlled by:

- User-entered date
- Profile option: **IBE: Quarter Begin Data**
- Profile option: **IBE: YTD Data Availability in Bins**

The table below, [Table 16–3, "iStore Reports Complete Data Refresh Set Begin Date Selection Summary"](#), summarizes how the system determines the beginning date when running the concurrent program set.

**Table 16–3 iStore Reports Complete Data Refresh Set Begin Date Selection Summary**

| <b>Profile: IBE:YTD<br/>Data Avail. in Bins</b> | <b>Profile: IBE: Quarter<br/>Begin Data</b>                     | <b>Begin Date Selection</b>                                                                                                                                                                            |
|-------------------------------------------------|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| If set to Yes                                   | Value irrelevant if YTD Data Availability in Bins is set to Yes | System uses the earlier of the user-entered date and the first day of the current Oracle General Ledger year. Defaults to first day of the current year if user does not enter a begin date.           |
| If set to No                                    | If set to Yes                                                   | System uses the earlier of the user-entered date and the first day of the current Oracle General Ledger quarter. Defaults to the first day of the current quarter if user does not enter a begin date. |
| If set to No                                    | If set to No                                                    | System uses the earlier of the user-entered date and the system date. Defaults to the system date if user does not enter a begin date.                                                                 |

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

### Prerequisites

- [Section 16.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 16.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 16.2.4, "Set Conversion Rates"](#)

### Steps

1. Log in to Oracle Forms with the iStore Concurrent Program Responsibility. The Submit a New Request window opens.
2. Choose Request Set and select OK. The Submit Request Set window opens.
3. Choose the request set, iStore Reports Complete Data Refresh Set, from the Request Set LOV.

The Submit Request Set window is populated with the concurrent programs that are in iStore Reports Complete Data Refresh Set.

4. Place your cursor in the Parameters field for iStore Reports Fact Tables Refresh. The Parameters window opens.
5. Set the parameters as follows:
  - a. **Refresh Mode:** Complete

- b. **Begin Date:** The start date for the time period for which data should be pulled from the Oracle Order Capture and Oracle Order Management tables.
- c. **End Date:** The end date for the time period. If you leave this blank, it defaults to the current system date.
- d. **Conversion Rate Check:** If this is set to Yes, the concurrent program will abort whenever the currency rates are not maintained. The details of the missing rates would be logged in the concurrent program log files (up to a maximum of 25 missing rates). If this is set to No, the program will execute with "default" values for the missing conversions. By default, this parameter is set to No.

Select OK to save.

The Parameters field for iStore Reports Fact Tables Refresh is populated with the parameters.

- 6. Place your cursor in the Parameters field for iStore Reports Materialized Views Refresh. The Parameters window opens.
- 7. Verify that the Fact Refresh Mode parameter is set to Complete, and select OK. The Parameters field for iStore Reports Materialized Views Refresh is populated with the parameter.
- 8. Place your cursor in the Parameters field for iStore Alert Reports. The Parameters window opens.
- 9. Set the Enabled parameter to Yes if you want to send the available e-mail reports as e-mail notifications, or No if you do not want to trigger the notifications. Select OK. The Parameters field for iStore Alert Reports is populated with the parameter.

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**Note:** See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for information on specifying notification recipients and message format.

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



When the concurrent programs are finished, the data for the Oracle iStore Reports is available for report queries from the Site Administration UI.

### 16.2.5.2 iStore Reports Increment Data Refresh Set

This program set adds only data for the time period between the last data refresh and your new end date. It is much faster than iStore Reports Complete Data Refresh Set, but may not be accurate if the unrefreshed data has changed since it was last captured.

The table below, [Table 16–4, "Oracle iStore Reports Increment Data Refresh Set Begin Date Selection"](#), summarizes how the system determines which beginning date to use when running this concurrent program set.

**Table 16–4 Oracle iStore Reports Increment Data Refresh Set Begin Date Selection**

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

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

---

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

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### Prerequisites

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

### Steps

1. Log in to Oracle Forms with the iStore Concurrent Program Responsibility. The Submit a New Request window opens.
2. Choose Request Set and select OK. The Submit Request Set window opens.

3. Choose the request set, iStore Reports Increment Data Refresh Set, from the Request Set LOV. The Submit Request Set window is populated with the concurrent programs that are in iStore Reports Increment Data Refresh Set.
4. Place your cursor in the Parameters field for iStore Reports Fact Tables Refresh. The Parameters window opens.
5. Set the parameters as follows:
  - a. **Refresh Mode:** Increment
  - b. **End Date:** The ending date for the time period for which data should be pulled from the Oracle Order Capture and Oracle Order Management tables. If you leave this blank, it defaults to the current system date.
  - c. **Conversion Rate Check:** If this is set to Yes, the concurrent program will abort whenever the currency rates are not maintained. The details of the missing rates would be logged in the concurrent program log files (up to a maximum of 25 missing rates). If this is set to No, the program will execute with "default" values for the missing conversions. By default, this parameter is set to No.

Select OK to save.

The Parameters field for iStore Reports Fact Tables Refresh is populated with the parameters.

6. Place your cursor in the Parameters field for iStore Reports Materialized Views Refresh. The Parameters window opens.
7. Verify that the Fact Refresh Mode parameter is set to Increment, and select OK. The Parameters field for iStore Reports Materialized Views Refresh is populated with the parameter.
8. Place your cursor in the Parameters field for iStore Alert Reports. The Parameters window opens.
9. Set the Enabled parameter to Yes if you want to send the available e-mail reports as e-mail notifications, or No if you do not want to trigger the notifications. Select OK.

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

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

10. Click Submit to submit the concurrent program requests.
11. Choose View > Requests to see the status of your requests.

When the concurrent programs are finished, the data for the Oracle iStore Reports is available for report queries from the Site Administration UI.

## 16.2.6 Verify Discoverer Implementation

1. If you imported the eex files using `adupdeul.sh`, go to Oracle Discoverer 4i Admin Edition and log in with apps user ID to validate the folders.  
**Example:** If the applications user ID is `ibe_admin`, then log in to Discoverer Admin edition with this user ID and give the responsibility as iStore Administrator.
2. After you log in with the apps user ID, open the Business area, then select View > Validate Folders to verify the Business Area E-Commerce Report.
3. If any of the folders are not valid (database objects missing), then check if Oracle iStore Minipack 11i.IBE.M has been applied or whether import was successful.
4. Launch the Site Administration UI and select the Reports tab. Verify that all reports are viewable.

## 16.3 Using the Bins Dashboard

Oracle iStore Data Out Bins are available within the Dashboard pages under the Reports tab in the Site Administration UI. Oracle iStore Bins utilize the Oracle Declarative Components Framework (DCF) to present both business and operational reports. The Dashboard page displays both bins and reports, as described below.

In the left portion of the Dashboard page, the following bins display:

- **Site Order Summary Bin** -- See [Section 16.6.4.1, "Site Order Summary - Dashboard Bin"](#), for details about this bin.
- **Unpublished Products Bin** -- See [Section 16.7.1.6, "Unpublished Products Bin"](#), for details about this bin.
- **Unpublished Sections Bin** -- See [Section 16.7.2.5, "Unpublished Sections Bin"](#), for details about this bin.

By default, when you initially enter the Reports > Dashboard pages the *daily* versions of the following three Oracle iStore Dashboard reports are displayed in the center of the page:

- **Top Orders Report** --- See [Section 16.6.3, "Top N Orders Report"](#), for details about this report.
- **Top Products Report** --- See [Section 16.6.1, "Top Product Sales Report"](#), for details about this report.
- **Top Customers Report** --- See [Section 16.6.2, "Customer Sales Report"](#), for details about this report.

Reports are summarized in [Section 16.1, "Overview of Oracle iStore Reports"](#).

## 16.4 Setting Bin Preferences

Using bin preferences, you can configure how the Oracle iStore bins display their data. After selecting the **Edit** link at the top of a bin, you can set preferences per session or cross sessions, utilizing the following submenus:

- **Parameters** -- Use this submenu to set **session-only** preferences.
- **Personalize** -- Use this submenu to set **cross-session** preferences.

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

- [Section 16.4.0.1, "Setting Preferences for Business Bins"](#)
- [Section 16.4.0.2, "Setting Preferences for Operational Reports"](#)

### 16.4.0.1 Setting Preferences for Business Bins

This section describes the parameters available for business bin preferences.

- For step-by-step instructions on how to access the preferences screens, see [Section 16.4.0.3, "Steps to Set Bin Preferences"](#).
- For a list of business reports, see [Section 16.1.0.1, "Business Reports Overview"](#).
- Details of the business reports are presented in [Section 16.6, "Oracle iStore Business Reports Details"](#).

For the business reporting bins, you can specify the following in the **Parameters** or **Personalize** pages:

- **Default currency** --- Use this LOV to select the default currency in which the bin should display monetary data. Currencies must be set up in Oracle General Ledger before they will appear in the Site Administration UI.
- **Number of Rows** --- Use this LOV to set the default number of rows in the bin.

- **Frequency** --- Use this LOV to specify the time period for the data that the bin should display.

Remember, no matter which frequency you select, the data displayed is dependent upon the End Date of the concurrent program which last populated the data tables. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#), for additional details.

Frequency time periods are the Oracle General Ledger period types, and the data displayed will be from the start of the period containing the end date of the concurrent program to the end date itself. For example, if the End Date of the concurrent program is July 15, the month period displayed will be July 1 to July 15. See [Section 16.2.1, "Set up Calendar in General Ledger"](#).

Frequency options are:

- **Day** — Select this option to view business data from the previous one day.
- **Week** — Select this option to view business for the previous one week, (specifically, between the end date of the concurrent program and the Monday that most recently preceded it).
- **Month, Quarter, and Year** — Select these options to view the business data from the past month, quarter, or year.
- **Scaling** --- Use this LOV to set the default scaling of numerical values. To display amounts in standard format, select Tens.

### 16.4.0.2 Setting Preferences for Operational Reports

This section describes the parameters available for operational bin preferences.

- For step-by-step instructions on how to access the preferences screens, see [Section 16.4.0.3, "Steps to Set Bin Preferences"](#).
- For a list of operational reports, see [Section 16.1.0.2, "Operational Reports Overview"](#).
- Details of the operational reports are presented in [Section 16.7, "Oracle iStore Operational Reports Details"](#).

For the operational reports, you can set the following preferences in the **Parameters** or **Personalize** pages:

- **Maximum Number of Days** --- Use this LOV to set the maximum number of product/section creation days prior to the current date.

- For the **Unpublished Products** bin, this means only unpublished products **created** between the current date and the current date minus the maximum number of days are displayed.
- For the **Unpublished Section** bin, this means only unpublished sections **created** between the current date and the current date minus the maximum number of days are displayed.
- **Maximum Number of Sections/Products** --- Use these LOVs to set the maximum number of sections or products to display in the bin.
- **Title** --- Use this textbox to create your own bin title. Note that this will overwrite the current bin title. To use the seeded bin title, remove all text from the textbox.
- **Footer** --- Use this textbox to create your own bin footer. Note that this will overwrite the current bin footer. To use the seeded bin footer, remove all text from the textbox.
- **Available Columns/Displayed Columns** --- Use the column shuttle windows to set the columns which will display in the bins.

### 16.4.0.3 Steps to Set Bin Preferences

Use the following procedure to set bin preferences.

#### Prerequisites

- [Section 16.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 16.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 16.2.4, "Set Conversion Rates"](#)

#### Steps

1. Launch the Site 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 16.4.0.1, "Setting Preferences for Business Bins"](#)
  - [Section 16.4.0.2, "Setting Preferences for Operational Reports"](#)

## 16.5 Setting up E-mail Delivery for Reports

Oracle iStore can deliver the Top N Orders Report and Site 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 Site Administration UI.

For the e-mail notifications, the names of these reports change:

- Site Order Summary is the Historical Summary Report in e-mail notification form
- Top N Orders is Top 10 Orders in e-mail notification form

Both e-mail versions contain data that is identical to the report version, except that for the Historical Summary Report, only daily information is presented. For the Top N Orders report, the e-mail notification contains the top 10 orders for the previous day. The e-mail reports are delivered every time the data is refreshed and the iStore Alert Reports concurrent program is run.

The e-mail notifications utilize Oracle iStore Notification Events to deliver the report data. The Top 10 Orders Report and Historical Summary Report are seeded notification events. If you wish to alter the seeded e-mail message, you can map a new e-mail message for these notification events. See the [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#), for more information.

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

### Prerequisites

- Set up Oracle iStore to use Oracle Workflow (See [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#).)
- [Section 16.2.2, "Set up Oracle Discoverer 4i for Use in Oracle iStore"](#)
- [Section 16.2.3, "Set iStore Profile Options for Reports"](#)
- [Section 16.2.4, "Set Conversion Rates"](#)

- [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#)

### Steps

1. Log in to the Site Administration UI and select the Reports tab. Select the Email Reports subtab. The Email Reports page displays. The User List for Selected Report area shows a list of users who are already set up to receive an e-mail delivery of the report selected in the Select Report LOV.
2. Optionally, you can turn on or off the e-mail delivery of these reports by using the Enable Email Reports checkbox. If the checkbox is not active, then the reports do not get mailed. Note that this does not toggle any profile option value.
3. From the Select Report pull-down menu, select the report for which you want to designate recipients, and then select the Go button. The User List for Selected Report refreshes with a list of the current e-mail report recipients for the report which you have selected.
4. Optionally, you can delete an e-mail delivery by selecting the Delete icon next to the applicable row.
5. **Adding a new delivery:** To add a recipient, select Add User button. The Email Preferences: Add User page opens.
6. In the User Name field, enter the recipient's name.
7. In the Email Address field, enter the recipient's full e-mail address.  
**Example:** john.doe@company.com
8. From the Language pull-down menu, select the language of the e-mail report.
9. Press the Apply button to save the changes.
10. The Email Reports page displays. To view the changes, may need to select the report again in the Select Report LOV and press the Go button.

## 16.6 Oracle iStore Business Reports Details

This section provides details about each business report available in Oracle iStore.

For a summary of the business reports that are available with this release, see [Section 16.1.0.1, "Business Reports Overview"](#).

- [Top Product Sales Report](#)
- [Customer Sales Report](#)



- [Top N Orders Report](#)
- [Site Order Summary Report](#)
- [Sales by Agreement Report](#)
- [Shopping Cart Conversion Report](#)
- [Sales by End User Type Report](#)

## 16.6.1 Top Product Sales Report

This report shows the most frequently ordered products and their sales amounts for selected time periods.

**Note:** Orders must be in Booked state before they appear in Oracle iStore reports.

The Oracle iStore Dashboard version of this report is called Top Products. For this report, the concurrent program captures each line item of the order. For example, a single order might have the same product appear twice, and each line will be counted in the report. Additionally, there may be other lines with different products other than the "top" products on a given order, and the order totals in this report will not reflect these.

**Note:** For model bundles created through Oracle Bills of Material (BOM), sales amounts are rolled up to the base model level; therefore, the user will not see any option items/option classes. Children items are rolled up into the sales amount with the parent item. Also, any non-optional components are ignored.

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**Note:** Sales Amount totals in Oracle iStore Reports do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.

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### Available as:

- [Top Product Sales - Discoverer Report](#)
- [Top Products - Dashboard Report](#)

### 16.6.1.1 Top Product Sales - Discoverer Report

This report features the ability to rank products based on the number of times ordered and the sales amount (in currency). Rankings are provided to make the report easy to understand and analyze.

Two Discoverer worksheets within this report are available:

- **Top Product Sales Ranked by Number of Times Ordered** - Ranks products based on the number of times ordered and displays them in descending order.

In the case of bundle items created through Oracle Bills of Material, the number of times ordered does not include any option class, options, or non-optional items.

This worksheet also does not include any shipping/handling, taxes, cancelled orders, or returned orders.

- **Top Product Sales Ranked by Sales Amount** -- Ranks products based on the sales amount and displays them in descending order by highest sales amount (in currency).

In the case of bundle items created through Oracle Bills of Material, the sales amount is rolled up at the base model level.

This worksheet also does not include any shipping/handling, taxes, cancelled orders, or returned orders.

#### ***Example 16–1 Product Inclusion in Top Product Sales Report***

##### Product A

sales total = \$5,000

lines ordered = 1

Product A = likely candidate for Top Product Sales Ranked by Sales Amount report

##### Product B

sales total = \$5,000

lines ordered = 50

Product B = likely candidate for Top Product Sales Ranked by Number of Times Ordered report

To retrieve either worksheet, first access the list of available reports by selecting Reports > Discoverer Reports > Business Reports in the Site Administration UI. Select the Top Product Sales Report hyperlink, and then select the desired worksheet to display a screen where you can enter the following parameters:

- **Date range** - Use the Begin Date and End Date fields to set the date range for which to run the report. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since concurrent programs populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer Viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default

dates and show the report. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information on how to run the concurrent programs.

- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Top N Product** -- Using the Top N Product field, the user can set the number of products ranked by the report. Entering a 10 in this field, for example, will return the top 10 best selling products.
- **Sorting** -- Using the Sort By drop-list, the user can sort the returned data by:
  - **Number of Times Ordered** - Sorts the report by the highest number of orders for a given product for the selected time period. Cancelled and returned orders are not included in the data. Orders must be in Booked state before they appear in Oracle iStore reports.
  - **Product Name** - Sorts the report by the product names in ascending alphabetical order (a to z, with numbers and special characters first).
  - **Sales Amount** - Sorts the report by highest amounts for the selected time period. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.

**Note:** If the user chooses no Sort order, then the system will return the data in the Number of Times Ordered column or Sales Amount column in *descending* alphabetical order (z to a, with numbers and special characters last).

After selecting parameters, the user then presses the Apply Parameters button, and the system brings up the report data in table format with the following columns:

- **Percentage columns** -- The columns Percent of Total Number of Times Ordered and Percent of Total Sales Amount show how much a given product has sold as a percentage of all the products sold during the selected time period. Therefore, if a user has selected the top five products in his parameters, the percent columns will reflect those top five products in light of all products sold during the time period. Not included in the data are returned or cancelled orders.
- **Product Number** -- Displays the Product SKU or ID number from Oracle Inventory.
- **Product Name** -- Displays the Product Name as stored in Oracle Inventory.
- **Number of Times Ordered** -- Displays the number of times each product has been ordered in the selected time period.
- **Sales Amount** -- Displays the total amount of sales generated a product in a given time period. Sales Amount totals do not include: taxes,

shipping/handling charges, cancelled orders, or returned orders. Sales amount is considered to be net amount after any adjustments have been made. The currency will depend upon the currency selected for the report.

**Note:** Use the Presentation Options link to change the display preferences of the page.

Grand totals are computed for the columns:

- Number of Times Ordered
- Percent of Total Number of Times Ordered
- Sales Amount (not including taxes or shipping/handling)
- Percent of Total Sales Amount

### 16.6.1.2 Top Products - Dashboard Report

This Oracle iStore Dashboard report identifies:

- Top selling products
- Number of orders per product
- Total sales amounts

**Note:** Orders must be in Booked state before they appear in Oracle iStore reports.

This report displays in the central area of the page when you select the Reports tab, and then the Dashboard subtab in the Site Administration UI. Information on using the bins dashboard can be found in [Section 16.3, "Using the Bins Dashboard"](#).

The Top Products in the Dashboard page displays the following columns:

- **Product** -- Displays a list of the top selling products.
- **Order Lines** -- Displays the number of orders for the product. Returned and cancelled orders are not included.
- **Sales** -- Displays the total amount of the sales for the product. Taxes and shipping/handling charges are not included.

## 16.6.2 Customer Sales Report

The Customer Sales Report allows you to identify your top customers in terms of sales figures. The Oracle iStore Dashboard Reports version of this report is called Top Customers.

This report also allows you to run reports using Customer Classes. Customer Classes are categories for customers that you define in Oracle Receivables. You can choose to classify your customers by industry, location, or size. You must first set up these customer classes in Oracle Receivables. See the *Oracle Receivables User Guide* for details.

**Available as:**

- [Customer Sales - Discoverer Report](#)
- [Top Customers - Dashboard Report](#)

### 16.6.2.1 Customer Sales - Discoverer Report

This report shows historical sales totals as:

- Total amount (in currency) to a customer or a Customer Class.
- Total number of orders to a customer or Customer Class.
- Statistical percentages that indicate the performance of a particular customer or Customer Class against that of all customers.

**Note:** Sales Amount totals in Oracle iStore Reports do not include:

- Taxes
- Shipping/handling charges
- Cancelled orders
- Returned orders

Also, orders must be in Booked state before they appear in Oracle iStore reports.

Retrieve this report by selecting Reports > Discoverer Reports in the Site Administration UI. In the Business Reports table, select the Customer Sales Report worksheet to bring up the input parameters screen with the following options:

- **Date range** - Set the date range for which to run the report. Use the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Customer Class** - Select one or multiple pre-defined Customer Classes previously set up in Oracle Receivables. UNASSIGNED means customers who are not assigned to a Customer Class.

**Note:** If you do not make a selection in this field, report returns data across all Customer classes.

- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
  - **Sales Amount** -- Sorts the report by total sales amount for the selected time period. Taxes and shipping/handling charges are not included.
  - **Average Sales Amount** -- Sorts the output by average size of transaction.
  - **Number of Orders** -- Sorts the report by number of orders. Cancelled and returned orders are not included.

**Note:** If you make no selection in the Sort By drop-list, then the report defaults to doing a sort on the Customer Class column.

After making parameter selections, the user selects the **Apply Parameters** button to retrieve the report with the following columns:

- **Customer Class** -- Displays the customer class(es) selected in the input parameters screen.
- **Customer Name** -- Displays the customer name, which is based on the Bill to customer record.
- **Number of Orders** -- Displays the number of orders the customer has placed for the selected time period. Returned and cancelled orders are not considered in the data.
- **Percent of Total Number of Orders** -- The percentage figure represents the number of orders that a given customer (shown in Customer Name column) has placed in relation to the total number of orders placed during the selected time period.
- **Sales Amount** -- Displays the total amount of sales for the customer for the selected time period. Sales amount does not include shipping/handling or taxes.
- **Percent of Total Sales Amount** -- The percentage figure represents the sales amount of the customers' orders in relation to total sales for all orders during the selected time period.

- **Average Sales Amount** -- Displays the average sales amount for orders placed by the customer for the selected time period.

**Drill Up/Down Feature in Customer Sales Report:** The Drill Up/Down feature allows you to roll data up for a summary view of order totals at the Customer Class-level, or drill down to see data at the individual customer level.

Grand totals are computed for the columns:

- Number of Orders
- Percent of Total Number of Orders
- Sales Amount
- Percent of Total Sales Amount
- Average Sales Amount

### 16.6.2.2 Top Customers - Dashboard Report

The Oracle iStore Reports Dashboard bin version of this report is a high-level, summary view of customer sales totals featuring drill-down capability on Customer Name.

This report displays in the central area of the page when you select the Reports > Dashboard in the Site Administration UI. You set display preferences for this report by selecting the Edit link at the top of the Site Order Summary bin. See [Section 16.4, "Setting Bin Preferences"](#), for instructions. Information on using the bins dashboard can be found in [Section 16.3, "Using the Bins Dashboard"](#).

The Top Customers Report in the Dashboard page displays the following columns:

- **Customers** -- The customers with the highest sales numbers appear in drill-down fashion. Drilling down on this field returns a list of the top orders for that customer. You can further drill down into order details.
- **Orders** -- Displays the total number of orders for a customer. Returned and cancelled orders are not included in the totals. Orders must be in Booked state before they appear in Oracle iStore reports.
- **Amount** -- Displays the total amount of the sales for a customer. Shipping/handling and taxes are not included.

## 16.6.3 Top N Orders Report

This report summarizes top orders by operating unit. Data returned is the last capture date of the concurrent program set.

**Note:** Orders must be in Booked state before they appear in Oracle iStore reports.

**Available as:**

- [Top N Orders - Discoverer Report](#)
- [Top Orders - Dashboard Report](#)
- [Top 10 Orders - E-mail Notification](#)

### 16.6.3.1 Top N Orders - Discoverer Report

This report shows the top orders by all sites within a single operating unit or multiple operating units, if more than one operating unit has been implemented.

To retrieve the report, first access the list of available reports by selecting Reports > Discoverer Reports > Business Reports in the Site Administration UI. Select the Top N Orders Report hyperlink to bring up a screen where you can enter the following parameters:

- **Date range** -- Use the Begin Date and End Date fields to set the date range for which to run the report. Use the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report.

See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information on running the concurrent programs.

- **Operating Unit** -- Select one, multiple, or all operating units from the list. (Hold down the Ctrl key while selecting to select more than one operating unit).

**Note:** If the user does not select an operating unit in this field, then the data is returned across all operating units.

- **Top N Orders** -- Using the Top N Orders field, the user can set the number of top selling orders that the report should return. Entering a 10 in this field, for example, will return the top 10 best orders by amount.
- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting** -- Using the Sort By drop-list, the user can sort the returned data by:



- **Customer Name** -- Sorts the report by the customer names in alphabetical order.
- **Sales Amount** -- Sorts the report by highest sales amounts for the selected time period. Sales Amount totals in Oracle iStore Reports do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Order Number** -- Sorts the report by the unique Order Number given to the order when the order is placed.

**Note:** If the user chooses no **Sort** order, then the system will return the data on Sales Amount in *descending* order.

After selecting parameters, the user then selects the **Apply Parameters** button, and the system brings up the report data in table format with the following columns:

- **Order Number** -- Unique Order Number given to the order when the order is placed.
- **Customer Name** - Displays the customer name that is associated with the orders returned.
- **Sales Amount** - Displays the total sales value of the order. Sales Amount totals in do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Operating Unit** - Displays the operating unit.

The grand total is computed on the Sales Amount column, which does not include taxes, shipping/handling, returned or cancelled orders.

### 16.6.3.2 Top Orders - Dashboard Report

The Oracle iStore Dashboard version of this report offers a summary view of the top orders by sales amount.

This report displays in the central area of the page when you select the Reports tab, and then the Dashboard subtab in the Site Administration UI. Information on using the bins dashboard can be found in [Section 16.3, "Using the Bins Dashboard"](#).

The data retrieved is for all operating units and specialty sites. You cannot run the report on specific operating units or sites. Data is current as of the last day that the concurrent program set was run. The Top Orders Report in the Dashboard page includes the following columns:

- **Order Number** -- This column is a drill-down field that allows the user to view order details, including:

- Order number
- Purchase order number
- Order total
- Customer name
- Shipping details
- Payment terms
- Date submitted
- Shipping and billing address details
- Products and quantity ordered
- **Customers** -- This column shows the name of the customer associated with the order number displayed in the Order column.
- **Sales** -- This column shows the total amount of sales (in currency) for the last day that the concurrent program set was run. Sales Amount totals do not include: taxes or shipping/handling charges. Cancelled and returned orders are not considered for the data.

The Order Number column in the Top Orders bin is a drill-down field that allows the user to see order details.

### 16.6.3.3 Top 10 Orders - E-mail Notification

Leveraging a seeded Oracle iStore Notification Event, the e-mail notification provides the top 10 orders for the most recent day that the concurrent program was run. Note that the e-mail version of this report supports only *daily* order information, not weekly, monthly, etc.

This e-mail is delivered to users that you designate in the Reports > Email Reports pages. See [Section 16.5, "Setting up E-mail Delivery for Reports"](#), for instructions on setting up e-mail recipients.

## 16.6.4 Site Order Summary Report

Using several different time segments derived from the Oracle General Ledger Sales Calendar, this report summarizes:

- Number of orders
- Total sales amount (in currency) of all orders

**Note:** Orders must be in Booked state before they appear in Oracle iStore reports.

The data retrieved is for all operating units and specialty sites. You cannot run the report on specific operating units or sites.

**Available as:**

- [Site Order Summary - Dashboard Bin](#)
- [Site Order Summary - E-mail Notification](#)

#### 16.6.4.1 Site Order Summary - Dashboard Bin

This bin displays on the left side of the Dashboard page, accessible by selecting Reports > Dashboard in the Site Administration UI. By setting bin preferences, you can choose to display information in this bin by day, week, month, quarter, or year. See [Section 16.4.0.1, "Setting Preferences for Business Bins"](#), for details.

For information on working with the Dashboard page, see [Section 16.3, "Using the Bins Dashboard"](#).

The Site Order Summary bin summaries order information for your sites and includes the following columns:

- **For** -- Contains drill-down fields which are time periods -- Day, Week, Month, Quarter, and Year -- determined by the Oracle General Ledger Sales Calendar. Drilling down into one of the time periods will retrieve a detail page which lists the top orders for that time period.
- **Sales** -- Displays the total amount of sales (in currency) for the corresponding time period. Sales amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Orders** -- Displays the number of orders for the corresponding time period. Cancelled and returned orders are not considered in the data.

Remember, the data is current as of the last day that the concurrent program set was run. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#), for additional information.

#### 16.6.4.2 Site Order Summary - E-mail Notification

Note that in the Notifications pages, this e-mail report displays as Historical Order Summary. Leveraging a seeded Oracle iStore's Notification Event, the e-mail notification contains information identical to the bin version, but is delivered via e-mail to users that you designate in the Reports > Email Reports menu.

See [Section 16.5, "Setting up E-mail Delivery for Reports"](#), for instructions on setting up e-mail recipients.

### 16.6.5 Sales by Agreement Report

This Discoverer report summarizes orders made through pricing agreements set up in Oracle Order Management's Basic Pricing module. Selected by customers during the ordering process, pricing agreements become part of the order which is sent into the Oracle Order Management system.

**Note:** Orders must be in Booked state before they appear in Oracle iStore reports.

The Sales by Agreement Report shows sales segmented by pricing agreements. Retrieve this report by selecting Reports > Discoverer Reports > Business Reports in the Site Administration UI.

In the Business Reports table, select the Sales by Agreement Report hyperlink to bring up the input parameters screen with the following options:

- **Date range** -- Set the date range for which to run the report. Use the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).  
  
Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.
- **Agreement Name** -- Select one, multiple or all pre-defined customer agreements set up in Oracle Order Management's Basic Pricing module. UNASSIGNED means sales not assigned to a pricing agreement. (Hold down the Ctrl key to select more than one.)
- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
  - **Sales Amount** - Sorts the report in descending order by sales amount (in currency).
  - **Agreement Name** -- Sorts the report by agreement name.

**Note:** If the user chooses no Sort order, then the system will sort the data on Agreement Name.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Agreement Name** -- Displays the pricing agreements names.
- **Customer Name** -- Displays the customer name(s) associated to the pricing agreements. This is the Bill to customer record.
- **Number of Orders** -- Displays the number of orders placed against the selected agreement(s). Cancelled and returned orders are not considered for the data.
- **Percent of Total Number of Orders** -- Displays a percentage that reflects the number of orders placed against a particular pricing agreement as compared to all orders placed during the selected time period.
- **Sales Amount** -- Displays the total sales amount for a particular pricing agreement. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Percent of Total Sales Amount** -- Displays a percentage that reflects the total sales against a particular pricing agreement as it relates to all sales for the given time period.
- **Average Sales Amount** -- Displays the average order value placed against the selected pricing agreement.

Grand totals are computed for the following columns:

- Number of orders
- Percent of Total Number of Orders
- Sales Amount
- Percent of Total Sales Amount
- Average Sales Amount

**Drill Up/Down Feature in Sales by Agreement Report:** The Drill Up/Down feature allows you to roll data up for a summary view of order totals at the Agreement level, or drill down to see data at the individual customer level.

## 16.6.6 Shopping Cart Conversion Report

This Discoverer report shows the number of times that a product has been placed into shopping carts and the number of times those products have been converted into orders. The conversion figure is then represented as a percentage.

**Note:** Orders must be in Booked state before they appear in Oracle iStore reports.

Two worksheets of the Shopping Cart Conversion Report are available:

- Products Ordered Versus In Cart Ratio for Top Ordered Products
- Products Ordered Versus In Cart Ratio for Top in Cart Products

**Note:** For bundle items created through Oracle Bills of Material (BOM), totals are rolled up to the base model level. Option class, options, and the configured items are not counted in the number of times ordered totals.

Retrieve this report by selecting Reports > Discoverer Reports > Business Reports in the Site Administration UI. Select the Shopping Cart Conversion Report hyperlink and then the desired worksheet hyperlink to bring up the input parameters screen with the following options:

- **Date range** - Using the Begin Date and End Date fields, the user can set the date range for which to run the report. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Top N Products** -- Allows users to enter the number of products for which to run the report.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
  - **Number of Times Ordered** -- Sorts the report by number of orders.
  - **Number of times Placed in Cart** -- Sorts the report by the number of times a product was placed in a cart.
  - **Product Name** -- Sorts the report by product name.

**Note:** If the user chooses no Sort order when running either sub-report, then the system will return the data in the Number of Times Ordered column or Number of Times Placed in Cart column in *descending* order.

After making his selections, the user then selects **Apply Parameters** to view the report data with the following columns:

- **Product Number** -- Displays the product SKU or ID number from Oracle Inventory.
- **Product Name** -- Displays the product name.

- **Number of Times Placed in Cart** -- Displays the number of times a product has been placed into shopping carts.
- **Number of Times Ordered** -- Displays the number of times a product has been ordered. Returned and cancelled orders are eliminated from the totals.
- **Ordered versus Placed in Cart Ratio** - Displays the percent of times a product has been ordered versus the times it has been placed into shopping carts.

Grand totals are computed on the following columns:

- Number of Times Placed in Cart
- Number of Times Ordered
- Number of Times Ordered Versus Placed in Cart Ratio

## 16.6.7 Sales by End User Type Report

The Sales by End User Type Report allows you to view order information for operating units and sort that information by end user type (organization-B2B or person-B2C), number of orders, and sales amounts. Orders must be in Booked state before they appear in Oracle iStore reports.

Retrieve this report by selecting Reports > Discoverer Reports > Business Reports in the Site Administration UI. In the Business Reports table, select Sales by End User Type hyperlink to bring up the input parameters screen with the following options:

- **Date range** - Using the Begin Date and End Date fields, the user can set the date range for which to run the report. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).

Remember, since the concurrent program sets populate the necessary tables in the database, the dates entered here must fall within the date range captured by the concurrent program. If you enter invalid dates, Discoverer viewer 4.1.43 or below will give an error; Discoverer viewer 4.1.44 or above will take default dates and show the report. See [Section 16.2.5, "Prepare Data \(Run Concurrent Programs\)"](#) for more information.

- **Operating Unit** -- Select one, several, or all operating units. (Hold down the Ctrl key while selecting to select more than one.)

**Note:** If no Operating Unit is selected, then the report will return data for all operating units.

- **Select User Type:** Select Person (B2C), Organization (B2B), or All.

**Note:** If no User Type is selected, then the report will return data for all user types.

- **Currency Code** -- Using the Currency Code field, users must select the currency in which the report should display currency values.
- **Sorting:** Using the Sort By drop-list, the user can sort on:
  - **Number of Orders** -- Sorts the report by number of orders.
  - **Sales Amount** -- Sorts the report the Sales Amounts.
  - **User Type** -- Sorts the report by user type.

**Note:** If the user chooses no Sort order when running this report, then the system will sort on Number of Orders in *descending* order.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Operating Unit** -- Displays the Operating Unit within which the orders were placed.
- **User Type** -- Displays the type of user, either Person (B2C) or Organization (B2B).
- **Number of Orders** -- Displays the number of orders attributed to the user type within organization(s) during the selected time period. Cancelled and returned orders are not considered in the data.
- **Percent of Total Number of Orders** -- Displays the percentage of orders as a percentage of total orders for the given organization(s) for the selected time period.
- **Sales Amount** -- Displays the amount (in currency) totals attributed to the user type for a given organization(s) within the selected time period. Sales Amount totals do not include: taxes, shipping/handling charges, cancelled orders, or returned orders.
- **Percent of Total Sales Amount** -- Displays the percentage of total sales (excluding tax and shipping/handling) as percentage of total sales of a given organization within the selected time period.

Grand totals are computed for every organization on the following columns:

- Number of Orders
- Percent of Total Number of Orders
- Sales Amount



- Percent of Total Sales Amount

Additionally, grand totals are provided for the above columns at the end of the report.

## 16.7 Oracle iStore Operational Reports Details

This section describes the operational reports and data out bins that are available for the Oracle iStore product catalog and section hierarchy, and discusses concepts and rules related to these reports or bins.

Topics include:

- [Section 16.7.1, "Product Reports and Bins"](#)
- [Section 16.7.2, "Sections Reports and Bins"](#)

### 16.7.1 Product Reports and Bins

This section provides specific details about each of the product reports and bins.

Several important rules about the product reports' integration with Oracle Inventory are discussed in [Section 16.7.1.1, "Product Reports and Oracle Inventory Setup"](#).

The following are the product reports or bins available:

- **Unassigned Products** --- This report lists products not assigned to any section. Both published and unpublished products are reported. See [Section 16.7.1.2, "Unassigned Products Report"](#).
- **Assigned Products** --- This report lists products assigned to at least one section. Both published and unpublished products are reported. See [Section 16.7.1.3, "Assigned Products Report"](#).
- **Products by Site Report** --- This report displays products assigned to at least one section by site. See [Section 16.7.1.4, "Products by Site Report"](#).
- **Products Excluded by Site Report** --- This report lists products explicitly excluded from one or many site(s). See [Section 16.7.1.5, "Products Excluded by Site Report"](#).
- **Unpublished Products** --- This bin lists Unpublished products created within a specific time period. See [Section 16.7.1.6, "Unpublished Products Bin"](#).

### 16.7.1.1 Product Reports and Oracle Inventory Setup

The following rules or guidelines apply to the product reports' integration with Oracle Inventory:

1. For all product reports, the Inventory Organization is a parameter, as defined by the profile option, IBE: Item Validation Organization. See [Section 7.3.1, "Products Retrieved From a Single Inventory Organization"](#), for more information.
2. Oracle iStore only supports products having the Web Status (item Inventory flag) set to Published or Unpublished. Therefore, product reports always include only products having the web status set to those values; the reports will not include items having the Web Status set to Disabled or null. See [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#), for more information.
3. The product reports make no distinction for items based on their Orderable on the Web status. See [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#), for more information.
4. For configurable products (Assemble to Order Configuration), during the order processing, a new item is created during the order execution.

**Example:** AT68331\*109 – Envoy Assemble to Order

This inventory item is a configuration that will be never exposed in the Site Administration UI product functionality. Therefore, this type of item will not be exposed in the product reports. However, the base model may still appear in the products reports.

5. The profile option, IBE: Category Set, determines which Inventory category set's products are available for reporting purposes. See [Section 7.3, "Guidelines and Considerations for Oracle iStore Product Setup"](#), and [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#), for more information.
6. Product field names in Oracle iStore are not an exact match with the Oracle Inventory forms field names. See [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for more information.

### 16.7.1.2 Unassigned Products Report

This Discoverer report displays products not assigned to any section and created in a given date range. Users can filter products by combining different selection criteria such as product number or name, category code/name or published status. This report may be useful to a site manager who wishes to:

1. Find newly created products which have not yet been assigned to any section.
2. Find all unpublished or published products that are unassigned to a section.

This report doesn't show any pricing information. If a product is not priced, the product will still show up in the report.

Category code/category description parameters are restricted by the category set defined in the IBE: Category Set profile option.

#### **Steps to Retrieve this Report:**

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Product Exceptions hyperlink and then the Unassigned Products hyperlink.

Selecting the Unassigned Products hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Product Creation Date Range** - Using the optional Creation Date Begin and Creation Date End fields, the user can set the date range for product creation. All products having a creation date lesser than or equal to the creation date end are selected. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The

category description can be entered partially with the % wildcard. The search is case insensitive.

- **Published Product** --- This LOV allows you to filter products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.
- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Category Description Ascending):
  - Creation Date
  - Category Description
  - Product Number
  - Product Name

For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following sortable columns:

- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.

### 16.7.1.3 Assigned Products Report

This Discoverer report displays products that are already assigned to at least one section. Users can filter products by different criteria, such as the product number or name or creation date range, category code/description and product publish status.

This report may be useful to a site manager who wishes to:

1. Find all products assigned to a section but in unpublished status.
2. List products from a specific categories assigned to at least one section (either published or unpublished products).

**Note:** There may be cases where a product is assigned to a section, but this section is not assigned to any site, and/or has a publish flag set to Unpublished. In that case, the product will still appear in the this report. The Assigned Products Report lists products assigned to sections, but doesn't check if the sections are ultimately published or assigned to a site (however, this can be checked with section reports).

**Steps to Retrieve this Report:**

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Product Exceptions hyperlink and then the Assigned Products hyperlink.

Selecting the Assigned Products hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Product Creation Date Range** --- Using the optional Creation Date Begin and Creation Date End fields, the user can set the date range for product creation. All products having a creation date lesser than or equal to the creation date end are selected. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.

- **Published Product** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.
- **Section Assignment** --- This mandatory field allows the user to show or not section assignments based on the validity of the product start and end date for that section. Values are:
  - **Current** -- This value will retrieve only section assignments for which the system date is within the product start and end date.
  - **Not Current** -- This value will retrieve only section assignments for which the system date is not within the product start and end date.
  - **All** --- This value will display section assignments without any criteria on product start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Ascending):
  - Creation Date
  - Category Description
  - Product Number
  - Product Name

For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path of the section where the product is assigned.

The section path is made up of the following: (1) The Relative Path, relative to the site root section; and (2) The Absolute Path, part of the path from the Root section to the parent section of the site root section. The absolute part of the path is enclosed in brackets ([ ]). When the site points to the Root section, there is no absolute path.

- **Section Name** --- Displays the section name of the section where the product is assigned.
- **Published Section** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Product Start Date** --- Displays the product creation start date.
- **Product End Date** --- Displays the product end date.

#### 16.7.1.4 Products by Site Report

This Discoverer report displays products assigned to sites (product can be either Published or Unpublished). Users can filter products by different criteria, such as the product number or name, creation date range, and site assignment. In addition, users can filter the report on Category Code, Category Description, Product Published Status, and section assignment as well. This report may be useful to a site manager who wishes to run a report listing which products are included in which site(s). The site manager can verify which section(s) each product has been mapped.

To be included in a site, a product has to be associated with one or more sections. This means that only products already assigned to sections will be displayed in this report. If a product is not included in any site, the product is never displayed in that report.

**Note:** The report displays --- for each product and by site --- which sections products are assigned to and which products are included in sites. The section publish flag is also displayed. But even if the section flag is Published and the Product publish flag is Published, it doesn't mean the product will show up in the Customer UI. The parent section of the section can have an Unpublished status. The report doesn't take in account this exception case. Also, a product can be assigned to one more many sections, but the product is excluded from all the sites where those sections are included. In that case, the product doesn't appear in the report, since the product is not going to appear under any section in the Site Administration UI.

#### Steps to Retrieve this Report:

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Product Exceptions hyperlink and then the Products by Site hyperlink.

Selecting the Products by Site hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Site** --- In this mandatory list box (multiple selection allowed) the user selects one or more sites. By default all the sites are selected.
- **Product Creation Date Range** --- Using the optional Creation Date Begin and Creation Date End fields, the user can set the date range for product creation. All products having a creation date lesser than or equal to the creation date end are selected. Dates should be entered in the format DD-MON-RRRR (2-digit day, 3-letter month, 4-digit year).
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product number partially by using the % wildcard. The search is case insensitive.
- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.
- **Published Product** --- This mandatory LOV filters products by their published/unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.



- **Section Assignment** --- This mandatory field allows the user to show or not section assignments based on the validity of the product start and end date for that section. Values are:
  - **Current** -- This value will retrieve only section assignments for which the system date is within the product start and end date.
  - **Not current** -- This value will retrieve only section assignments for which the system date is not within the product start and end date.
  - **All** --- This value will display section assignments without any criteria on product start and end date for that section.

The default value is All.

- **Secondary Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Product Number Ascending):
  - Creation Date
  - Product Number
  - Product Name

The primary sorting is always on Site Name. For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following sortable columns:

**Note:** The user is able to roll up this report at the product level (to display products without any section mapping column).

- **Site** --- Displays the site name.
- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path of the section where the product is assigned.

The section path is made up of the following: (1) The Relative Path, relative to the site root section; and (2) The Absolute Path, part of the path from the Root section to the parent section of the site root section. The absolute part of the path is enclosed in brackets ( [ ] ). When the site points to the Root section, there is no absolute path.

- **Section Name** --- Displays the section name of the section where the product is assigned.
- **Published Section** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Product Start Date** --- Displays the product creation start date.
- **Product End Date** --- Displays the product end date.

#### 16.7.1.5 Products Excluded by Site Report

This Discoverer report displays which products have been explicitly excluded from a specific site. Users can filter products by category, product number, and product name. This report includes only products associated with sections – when a product is not associated to a section, there is no site mapping.

This report may be useful to a site manager who wishes to find out which products of a given category are excluded from a site. This can happen when the same section/product hierarchy is shared across multiple sites.

##### Steps to Retrieve this Report:

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Product Exceptions hyperlink and then the Products Excluded by Site hyperlink.

Selecting the Products Excluded by Site hyperlink will bring up the input parameters screen with the following options:

- **Inventory Organization** --- Using the LOV, the user must select from the list of all organizations of type Inventory Organization. This defaults to the Item Validation Organization defined for the responsibility used by the iStore administrator (IBE: Item Validation Organization). This is a mandatory field.
- **Site** --- In this mandatory list box (multiple selection allowed) the user selects one or more sites. By default all of the sites are selected.
- **Product Number** --- The user can use this optional field to enter the product number in one of three fields: Exact Match, Starts With, or Contains. The user

also can enter the product number partially by using the % wildcard. The search is case insensitive.

- **Product Name** --- The user can use this optional field to enter the product name in one of three fields: Exact Match, Starts With, or Contains. The user also can enter the product name partially by using the % wildcard. The search is case insensitive.
- **Category Code** --- The user can use this optional field to enter the category code in one of three fields: Exact Match, Starts With, or Contains. The category code can be entered partially with the % wildcard. The search is case insensitive.
- **Category Description** --- The user can use this optional field to select a category description in one of three fields: Exact Match, Starts With, or Contains. The category description can be entered partially with the % wildcard. The search is case insensitive.
- **Published Product** --- This mandatory LOV filters products by their published/unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Assignment** --- This mandatory field allows the user to show or not section assignments based on the validity of the product start and end date for that section. Values are:
  - **Current** -- This value will retrieve only section assignments for which the system date is within the product start and end date.
  - **Not Current** -- This value will retrieve only section assignments for which the system date is not within the product start and end date.
  - **All** --- This value will display section assignments without any criteria on product start and end date for that section.

The default value is All.

- **Secondary Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Ascending):
  - Creation Date
  - Product Number
  - Product Name

The primary sorting is always on Site Name. For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the **Apply Parameters** button and brings up the report data with the following columns:

- **Site** --- Displays the site name.
- **Creation Date** --- Displays the product creation date.
- **Category Description** --- Displays the category description of the category that the product resides in.
- **Product Number** --- Displays the product number.
- **Product Name** --- Displays the product name.
- **Published Product** --- Displays the product Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path of the section where the product is assigned.

The section path is made up of the following: (1) The Relative Path, relative to the site root section; and (2) The Absolute Path, part of the path from the Root section to the parent section of the site root section. The absolute part of the path is enclosed in brackets ( [ ] ). When the site points to the Root section, there is no absolute path.

- **Section Name** --- Displays the section name of the section where the product is assigned.
- **Published Section** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Product Start Date** --- Displays the product creation start date.
- **Product End Date** --- Displays the product end date.

### 16.7.1.6 Unpublished Products Bin

The Unpublished Products bin on the Reports Dashboard page displays products which have a status of Unpublished, across all sites.

A product's Published or Unpublished status is equal to the product's Inventory Web Status flag setting of Yes or No. See [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#), for more information on this flag.

Users can set preferences for the bin display. See [Section 16.4.0.2, "Setting Preferences for Operational Reports"](#), for more information.

By default, this bin displays the following columns:

- **Product Name** -- Displays the name of the product, with drill-down capability to the Update Product: Details page in the Site Administration UI. The name is limited to the first 15 characters; an ellipses (...) displays if this character limit is exceeded.
- **Creation Date** -- Displays the product creation date.
- **Assigned Sections** -- This column displays a number that tells how many sections the product listed is assigned to.

## 16.7.2 Sections Reports and Bins

This section describes the operational Discoverer reports and Oracle iStore bins that are available for Oracle iStore sections.

The following section reports and bins are available:

- **Sections With Site Assignment** --- This report lists sections assigned to at least one site. See [Section 16.7.2.1, "Sections With Site Assignment Report"](#).
- **Sections Without Site Assignment** --- This report lists sections not assigned to any site. See [Section 16.7.2.2, "Sections Without Site Assignment Report"](#).
- **Sections With Site Exclusion** --- This report lists sections excluded from sites. See [Section 16.7.2.3, "Sections With Site Exclusion Report"](#).
- **Empty Sections** --- This report lists sections with neither products nor sections published under them. See [Section 16.7.2.4, "Empty Sections Report"](#).
- **Unpublished Sections** --- This bin lists sections which have an Unpublished status. See [Section 16.7.2.5, "Unpublished Sections Bin"](#).

### 16.7.2.1 Sections With Site Assignment Report

This Discoverer report displays all sections mapped to sites. Users can filter sections by various criteria, such as the creation date range, section name, or section code. This report may be useful to a site manager who wishes to find out which newly created sections have not been published.

For more information on the section hierarchy, see [Section 8.3, "Catalog Overview"](#), and [Section 8.8, "Creating and Maintaining Sections"](#).

**Note:** Even if the report is run for Published sections, it doesn't mean the selected sections will show up in the Customer UI. The parent section of the selected sections can be Unpublished, while the section is Published. This exception case is not taken in account in this report.

### Steps to Retrieve this Report:

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Section Exceptions hyperlink and then the Sections With Site Assignment Report hyperlink.

Selecting the Sections With Site Assignment Report hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional Creation Date Begin and Creation Date End fields, the user can set the begin and end date section create date criteria.
- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
  - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
  - **Not Current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
  - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Descending):
  - Creation Date
  - Section Code
  - Section Name

- **Section Path**

For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.
- **Published** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date Active** --- Displays the section start date.
- **End Date Active** --- Displays the section end date, if any.
- **Sites** -- Displays the site names where the section is assigned.

### 16.7.2.2 Sections Without Site Assignment Report

This Discoverer report displays sections which have no mapped sites. Users can filter sections by creation date range, section name, or section code. This report may be useful to a site manager who wishes to find out which sections are not mapped to any sites.

For more information on the section hierarchy, see [Section 8.3, "Catalog Overview"](#), and [Section 8.8, "Creating and Maintaining Sections"](#).

#### Steps to Retrieve this Report:

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Section Exceptions hyperlink and then the Sections Without Site Assignment Report hyperlink.

Selecting the Sections Without Site Assignment Report hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional Creation Date Begin and Creation Date End fields, the user can set the begin and end date section create date criteria.

- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, Published and Unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
  - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
  - **Not Current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
  - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following (default selection: Creation Date Descending):
  - Creation Date
  - Section Code
  - Section Name
  - Section Path

For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.



- **Published** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date** --- Displays the section start date.
- **End Date** --- Displays the section end date, if any.

### 16.7.2.3 Sections With Site Exclusion Report

This Discoverer report displays sections which have been explicitly excluded from sites. Each site is mapped to a parent section in the site hierarchy. In this report, only sections within the parent section of the selected site(s) are considered. Users can filter sections by creation date range, section name, or section code.

This report may be useful to a site manager who wishes to find out which sections have been excluded from a specific site. This scenario would occur typically when the same section hierarchy is shared across multiple sites. In this case, some sections may be excluded from a site.

For more information on the section hierarchy, see [Section 8.3, "Catalog Overview"](#), and [Section 8.8, "Creating and Maintaining Sections"](#).

#### Steps to Retrieve this Report:

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Section Exceptions hyperlink and then the Sections With Site Exclusion Report hyperlink.

Selecting the Sections With Site Exclusion Report hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional Creation Date Begin and Creation Date End fields, the user can set the begin and end date site create date criteria.
- **Sites** --- The user can use this field to select one or more sites.
- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.

- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
  - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
  - **Not current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
  - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following secondary sort criteria (default selection: Creation Date Descending):
  - Creation Date
  - Section Code
  - Section Name
  - Section Path

The primary sorting is always by site. For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Site** --- Displays the site name where the section is excluded.
- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.
- **Published** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date Active** --- Displays the section start date.

- **End Date Active** --- Displays the section end date, if any.

#### 16.7.2.4 Empty Sections Report

This Discoverer report displays all the sections that have no products or sections published under them, across all sites. Users can filter sections by creation date range, section name, or section code.

A section qualifies as *empty* if it meets **at least one** of the following criteria:

1. The section has no children (sections or products); OR
2. All the children of the section are unpublished; OR
3. All the children have a start and end date which are not current; OR
4. All the children of the section are excluded from all the sites in which the section is included.

**Example:** Section 1 has one child, Product 1. Product 1 is excluded from Site 1, and Section 1 is included only in Site 1. In this example, Section 1 is considered empty.

This report may be useful to a site manager who wants to know if there are any empty sections in any sites. This situation usually happens when an automated script modifies the product flag to Unpublish. In this case, sections may end up empty.

**Note:** Even if the report is run for Published sections, it doesn't mean the selected sections will show up in the Customer UI. The parent section of the selected sections can be Unpublished, while the section is Published. This exception case is not taken in account in this report.

#### Steps to Retrieve this Report:

1. Select Reports > Discoverer Reports > Operational Reports in the Site Administration UI.
2. In the Operational Reports table, select the Catalog Section Exceptions hyperlink and then the Empty Sections Report hyperlink.

Selecting the Empty Sections Report hyperlink will bring up the input parameters screen with the following options:

- **Date Range** --- In the optional Creation Date Begin and Creation Date End fields, the user can set the begin and end date site create date criteria.

- **Section Code** --- The user can use this optional field to enter the section code in one of three fields: Exact Match, Starts With, or Contains. The section code can be entered partially with the % wildcard. The search is case insensitive.
- **Section Name** --- The user can use this optional field to select a section name in one of three fields: Exact Match, Starts With, or Contains. The section name can be entered partially with the % wildcard. The search is case insensitive.
- **Published** --- This mandatory LOV filters products by their Published/Unpublished status (equal to the Web Status flag in Oracle Inventory) for the selected inventory organization. Available values are: Yes, No, ALL. The default is ALL products, published and unpublished.
- **Section Start and End Date** --- Using this mandatory field, the user can set the date range for section validity as a criteria. Values are:
  - **Current** -- This value will retrieve only sections for which the system date is within the section start and end date.
  - **Not Current** -- This value will retrieve only sections for which the system date is not within the section start and end date.
  - **All** --- This value will display sections without any criteria on section start and end date for that section.

The default value is All.

- **Sort By** --- This optional LOV allows you to sort the report results by one of the following secondary sort criteria (default selection: Creation Date Descending):
  - Creation Date
  - Section Code
  - Section Name
  - Section Path

For each sort criterion, you can specify if the sort is ascending or descending.

After making his selections, the user then selects the Apply Parameters button and brings up the report data with the following columns:

- **Creation Date** --- Displays the section creation date.
- **Section Name** --- Displays the section name of the section.
- **Section Code** --- Displays the section code of the section.

- **Published** --- Displays the section Published/Unpublished status: Yes means the product is Published. No means product is Unpublished.
- **Section Path** --- Displays the section path.
- **Start Date** --- Displays the section start date.
- **End Date** --- Displays the section end date, if any.
- **Sites** --- Displays the sites that the section is mapped to. If the section has no site mapping, the value displays as `Unassigned`.

### 16.7.2.5 Unpublished Sections Bin

The Unpublished Sections bin on the Reports Dashboard page displays sections which have a status of Unpublished, across all sites.

Users can set preferences for the bin display. See [Section 16.4.0.2, "Setting Preferences for Operational Reports"](#), for details.

By default, this bin displays the following columns:

- **Section Name** -- Displays the name of section. The section name is limited to the first 15 characters; an ellipses (...) displays if this character limit is exceeded. The section name field is a hyperlink to the Update Section: Details page in the Site Administration UI.
- **Creation Date** -- Displays the section creation date.
- **Featured** -- This column displays Yes or No, depending upon whether the section is a Featured section. See [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#), for more information.

## 16.8 Understanding Oracle iStore Reports Architecture

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

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

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

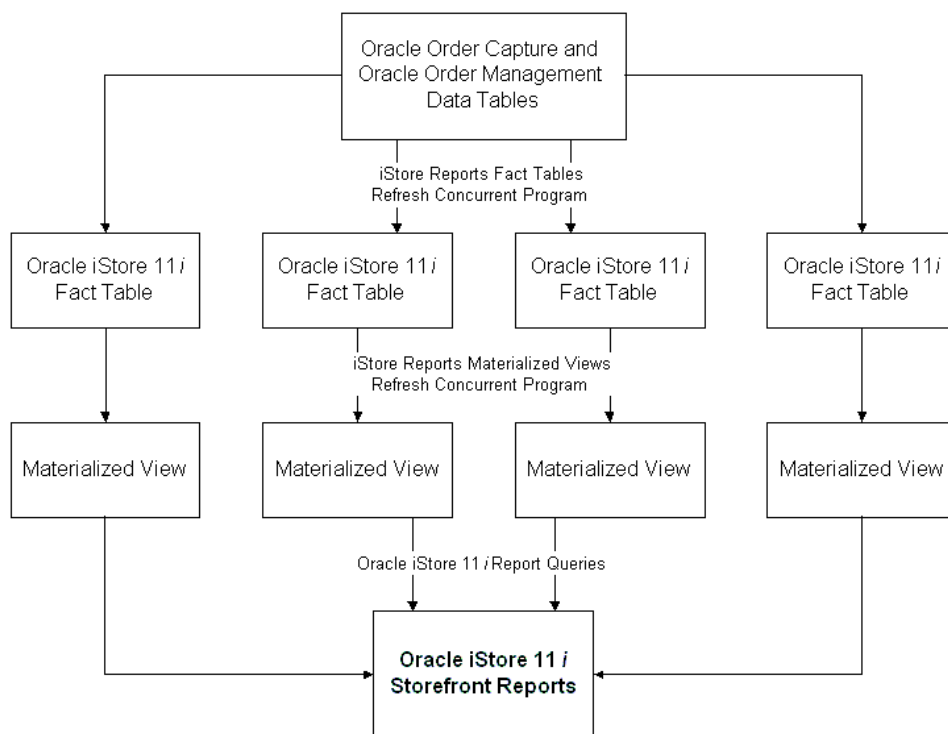
The iStore Alert Reports concurrent program triggers delivery of the updated Top 10 Orders Report and Historical Summary Report as e-mail notifications.

The reports and queries that comprise Oracle iStore reports are run against these fact tables. The following table, [Table 16–5, "Fact Tables for Oracle iStore Reports"](#), describes the fact tables for Oracle iStore Reports.

**Table 16–5   Fact Tables for Oracle iStore Reports**

| Fact Table Name            | Description                                                                                                                                                                                                        |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IBE_ECR_MVLOG              | This table captures the refresh log history, as well as the begin date and end date of the transaction records that are refreshed into the base materialized views.                                                |
| IBE_ECR_ORDER_HEADERS_FACT | This table provides header-level information for orders from Oracle Order Management tables. The orders are placed for sources that are specified in the lookup iStore Order Facts Sources (IBE_ECR_ORDER_SOURCE). |
| IBE_ECR_ORDERS_FACT        | This table provides information from Oracle Order Management tables about the sale and quantity of items in orders, including data for Product, Customer, and Contracts.                                           |
| IBE_ECR_QUOTES_FACT        | This table provides information from Oracle Order Capture tables about items in quotes and shopping carts.                                                                                                         |

The basic architecture for Oracle iStore Reports is shown in the following figure, [Figure 16–1, "Oracle iStore Reports Architecture"](#).

**Figure 16–1 Oracle iStore Reports Architecture**

## 16.9 Oracle iStore Reports Lookup Types

The Oracle iStore Reports lookup types are iStore Order Facts Sources (IBE\_ECR\_ORDER\_SOURCE) and iStore Reporting Currencies (IBE\_ECR\_REPORTING\_CURRENCY).

The lookup iStore Order Facts Sources contains all reportable order sources. The Oracle iStore Reports use information for the orders that are placed for these sources. The lookup iStore Reporting Currencies contains the currency codes that are available for the Data Out Bins.

Use the following procedure to add lookup codes to these lookup types.

### Steps

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



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# Implementing Globalization and Multi-Org Architecture

This chapter describes how to implement Oracle iStore 11i in a global instance.

Topics include:

- [Section 17.1, "Overview of Globalization and Multiple Organization Architecture"](#)
- [Section 17.2, "Oracle iStore Key Global Features and Benefits"](#)
- [Section 17.3, "Implementing Globalization with Oracle iStore"](#)

## 17.1 Overview of Globalization and Multiple Organization Architecture

A global implementation of your Oracle Applications enables you to do business in multiple countries, languages, and currencies. Leveraging Oracle Multiple Organization Architecture ("multi-org"), a global implementation allows you to:

- Create multiple sets of books, each with its own unique calendar, chart of accounts, and functional currency. Each set of books then can be tied to a sub-organization of your master organization, and to separate legal entities.
- Sell Inventory from one legal entity (which uses one set of books) and ship them from another legal entity (using a different set of books). Oracle Receivables can automatically record the appropriate intercompany sales by posting intercompany accounts payable and accounts receivable invoices.
- Reuse database tables, meaning one-time data entry.
- Ability to segregate transactions by operating unit -- since each organization is uniquely linked to an operating unit -- yet still share certain information (such as customers) between organizations.

- Support multiple currencies (including the Euro) and several languages.

**Note:** All customers who are using currently supported versions of the E-Business Suite Release 11i products that are Multi-Org enabled (this includes Oracle iStore), will need to complete the prerequisite step of running the Convert to Multi-Org process before applying patches released after September 30, 2002. This is a one-time step.

For Oracle Applications Multi-Org information, see:

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

To find this manual, visit [Oracle MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and search for the part number listed above.

## 17.2 Oracle iStore Key Global Features and Benefits

Oracle iStore is fully equipped to support a global deployment by offering --- in addition to the multi-org architecture benefits discussed above --- several features and benefits that can enable you to present a world-wide web presence. Some of these features and benefits include:

- After assigning responsibilities to an operating unit, the ability to limit user purchases to one operating unit's set of books.
- Online specialty sites in multiple languages and currencies.
- Ability to offer translated product data and site prompts.
- Support for regional payment type availability.
- Restriction of bill-to and ship-to countries for each operating unit.
- Localization of product catalogs and inventory.
- Support for regional tax requirements, payment types, and shipping methods.

## 17.3 Implementing Globalization with Oracle iStore

The following are the steps to successfully implement globalized specialty sites using Oracle iStore:

- [Section 17.3.1, "Implement Oracle Multiple Organization Architecture"](#)
- [Section 17.3.2, "Install Languages and Currencies"](#)
- [Section 17.3.3, "Set up Responsibilities"](#)

- [Section 17.3.4, "Create Global Sites"](#)
- [Section 17.3.5, "Translate Product Descriptions"](#)
- [Section 17.3.6, "Enable Global Currencies and Price Lists"](#)
- [Section 17.3.7, "Set up Global Customer UI"](#)
- [Section 17.3.8, "Use Global Address Formats"](#)
- [Section 17.3.9, "Ensure Display of Localized Quantities"](#)

### 17.3.1 Implement Oracle Multiple Organization Architecture

A global implementation of Oracle iStore requires that iStore's mandatory dependencies (see [Section 2.2.2, "Mandatory Dependency Implementation Steps"](#)) be implemented using Oracle Multiple Organization Architecture. Oracle iStore relies on the schema supplied by these applications for much of its back-office global functionality.

For Oracle Applications Multi-Org information, see:

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

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

### 17.3.2 Install Languages and Currencies

You can set up multiple sites (all within a single instance), each deploying a different currency and language. Oracle iStore supports all of the currencies that the Oracle E-Business Suite supports, including the Euro. Through its integration with Oracle Applications Release 11i, each specialty site also can display appropriate currency symbols.

Languages and currencies are enabled in the Oracle Application Object Library (AOL) module during setup. After initially enabling languages in AOL, you set them up in Oracle General Ledger.

A web customer's preference, as defined in his Oracle iStore user profile, determines which currency and language is used for a specialty site, unless a customer explicitly selects a specialty site in a particular language.

To install multiple languages and currencies see:

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

To enable the currencies that your sites will support, see the following:

- *Oracle General Ledger User Guide*

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

### 17.3.3 Set up Responsibilities

Each site supports multiple responsibilities, and each iteration of a site and a responsibility make a specialty site accessible in the Customer UI. It is recommended, however, that you set up your sites to each support a single responsibility (and thus a single specialty site). This single specialty site then can be rendered in different languages and currencies.

When a user's registration is approved, he is granted at least one responsibility. A match between a customer's responsibility and the responsibility supported by a site allow the customer to see the specialty site. Out-of-the-box, Oracle iStore supplies the responsibility, IBE\_CUSTOMER, for use with your customers.

The operating unit tied to the responsibility a customer is using when he places an order determines the operating unit in which the order is recorded. In a multiple operating unit environment, you would create a separate IBE customer responsibility to link to different operating units. The association between the operating unit and the responsibility is done by setting the profile option, MO: Operating Unit, to its respective operating unit for each of the customer responsibilities.

When a customer enters a specialty site, Oracle iStore notes the customer's responsibility and the operating unit to which it is assigned, then restricts the customer to the items in the Inventory Organization that is associated with the operating unit. Oracle iStore accomplishes this by retrieving the Inventory Organization ID for the current user responsibility's operating unit from the OE\_SYSTEM\_PARAMETERS\_ALL table. Use Oracle Order Management to associate Inventory Organization IDs with operating units.

### 17.3.3.1 Sample Responsibilities Setup for Oracle iStore Multi-Org

Following is a sample responsibilities setup for a multi-org implementation:

1. Create a separate responsibility for each operating unit. You can use the seeded responsibility IBE\_CUSTOMER as one of these responsibilities. Each operating unit must be tied uniquely to a single responsibility.

**Example:** Create IBE\_CUSTOMER\_G for your German operating unit, and use IBE\_CUSTOMER for your U.S. operating unit.

2. Link each responsibility to an operating unit by setting the MO: Operating Unit profile option at the responsibility level to the operating unit.

**Example:** At the responsibility level IBE\_CUSTOMER\_G, set MO: Operating Unit to Vision Germany.

See [Section A.2, "How to Set Profile Options"](#), and the *Oracle Applications System Administrator's Guide* for steps.

## 17.3.4 Create Global Sites

Using the Oracle iStore Site Administration UI, create a new site for each responsibility, and link each site with its responsibility. See [Section 5.2, "Creating Sites"](#), for steps.

## 17.3.5 Translate Product Descriptions

See [Section 7.6, "Translating Product Descriptions"](#), for details.

## 17.3.6 Enable Global Currencies and Price Lists

Oracle iStore supports all of the currencies supported across the Oracle E-Business Suite, including the Euro, and supports multiple-currency price lists. See [Chapter 10, "Implementing Pricing"](#), for more information.

## 17.3.7 Set up Global Customer UI

All of the pages in Oracle iStore's Customer UI are made up of Display Templates mapped to specific JSP files. Within each template your implementation can support various content (.htm files, images) through the use of content components and media objects. In addition, hundreds of seeded text messages display in the UI.

#### **17.3.7.1 Map New JSPs**

In a multiple-language implementation, you must set up JSP files in the other (non-base) languages and then map the JSPs to the programmatic access names of each Display Template. For more information, see: [Section 8.1, "Understanding Customer UI Page Display"](#).

#### **17.3.7.2 Set up Content**

For content, similarly, you must provide content for the other languages and map them to the content components or media objects. For more information, see: [Section 9.1, "Content Overview"](#).

#### **17.3.7.3 Set up Text Messages**

All seeded specialty site text messages, such as prompts and labels, are stored in Oracle Applications Message Dictionary. If a global site continues to use the seeded text for messages and prompts, these the seeded text will automatically be translated when the additional languages are installed. However, if alternate messages text is created, then the merchant will need to manually translate the content. For more information, see: [Chapter 15, "Implementing Messages and Prompts"](#).

### **17.3.8 Use Global Address Formats**

Through its integration with Oracle Receivables, Oracle iStore can provide address entry formats specific to particular countries. This allows the application to dynamically provide Address Book data entry formats based on the country selected by the user. See [Section 2.6.1, "Setting up Country Address Formats"](#), for instructions.

### **17.3.9 Ensure Display of Localized Quantities**

Oracle iStore supports displaying the different quantity formats used by various languages around the world. Some languages, for example, show the quantity "one thousand" as 1,000, while others show this same quantity as 1.000. As of Release 11.5.10, Oracle iStore supports localized quantity formats, using the language of a specialty site to automatically derive the localization convention. No setup is required for quantity localization. However, merchants using Oracle iStore Release 11.5.10 with customized, pre-Release 11.5.10 Customer UI pages may experience localized quantity display issues.

---

**Note:** This issue affects only those implementing Release 11.5.10 who are continuing to use the pre-existing (pre-R11.5.10) customized JSP pages/templates shown below.

---

### 17.3.9.1 JSP Files/Templates Affected

The localized quantity support changes in Oracle iStore R11.5.10 code will cause unexpected behavior when the user interacts with the following pages:

1. Modify shopping cart process page.
  - Template name --- STORE\_CART\_MODIFY\_P
  - JSP name --- ibeCScpViewA.jsp
2. Display model item lines page
  - Template name --- STORE\_CART\_MDL\_ITEM\_LINES
  - JSP name --- ibeCScdMdlItemLines.jsp
3. Modify line level shipping details process page
  - Template name --- STORE\_CART\_LINE\_SPLIT\_DETAILS\_P
  - JSP name --- ibeCCkpLineSplit.jsp
4. Add bundle, add education, or add bundle with education page
  - Template name --- STORE\_CART\_BUNDL\_EDUC\_P
  - JSP name --- ibeCScpBundEduc.jsp
5. Add to Cart JSP --- This one is not a template, but a JSP file only. It is included by other JSPs and is not expected to be customized.
  - JSP name --- ibeCScpAddToCart.jsp

Remember that these pages are used in many flows for shopping carts, and hence a customer may encounter problems in many flows if these pages are not adjusted.

### 17.3.9.2 Examples of How the Issue May Appear

Following are examples of how the quantity localization issue may show up in the Customer UI:

- If the user enters 1 , 5 as quantity in a German-language specialty site, some of the JSPs above will show an invalid quantity error message to the user.

- If the user enters 1500.00 as quantity in a German-language specialty site, it will be interpreted as 150000, which may not be what the customer was expecting to see --- he may have been expecting the display in English notation.

Note that this localization issue does not affect the display of prices in the Customer UI.

### 17.3.9.3 Altering Customized JSP Files up to Support Localization

To address this issue, Oracle iStore implementers can modify the JSP files listed above to include a call to consider the specialty site language before displaying quantities. The class, `oracle.apps.ibe.util.NumFormat`, is a new class in Oracle iStore Release 11.5.10 which supports parsing and formatting numbers given any language. In essence, the JSPs listed above must be altered to use the `NumFormat` class to parse and format quantities.

In validating quantities in the above JSPs, Oracle iStore validates quantity using this logic:

1. Convert quantity entered by user to `BigDecimal`.
2. Check if the quantity is a valid number in the situation (e.g., it must be greater than zero, etc.).

For step 1, the code would typically be in the form:

```
BigDecimal quantity = new
BigDecimal(request.getParameter("..."));
```

This should now be changed to:

```
NumFormat format = new
NumFormat(RequestCtx.getLanguageCode());

BigDecimal quantity =
format.parseNumber(request.getParameter("..."));
```

See [Section 8.1, "Understanding Customer UI Page Display"](#), and [Section 8.2, "Display Templates Overview"](#), for the fundamentals of Oracle iStore Customer UI display.



---

# Implementing Performance and SSL

This chapter describes the implementation of performance improvements and Secure Socket Layer (SSL) connections in Oracle iStore 11*i*.

Main topics in this chapter include:

- [Section 18.1, "Overview of Caching"](#)
- [Section 18.2, "Overview of Cached Data in Oracle iStore"](#)
- [Section 18.3, "Setting up JTT Cache"](#)
- [Section 18.4, "Setting up Secure Socket Layer Connections"](#)

## 18.1 Overview of Caching

Caching technology allows the storage and monitoring of web object (Java object) requests from a server. On subsequent requests for the same object, the cache delivers the object from its storage rather than passing the request on to the origin server. This increases the speed with which objects are retrieved, and thus speeds the performance of your web site.

Web objects change over time, so each web object has a useful life, or "freshness." Caches determine whether or not their copy of an object is still "fresh," or whether they need to retrieve a new copy from the origin server. The higher the number of people requesting the same object during its useful life, the more upstream traffic the cache eliminates. By handling object requests rather than passing them upstream to the origin server, caches reduce network traffic and improve the browsing experience for users.

## 18.2 Overview of Cached Data in Oracle iStore

You can set up Oracle iStore to rely on Oracle CRM Technology Foundation (JTT) Cache to cache your specialty site page objects.

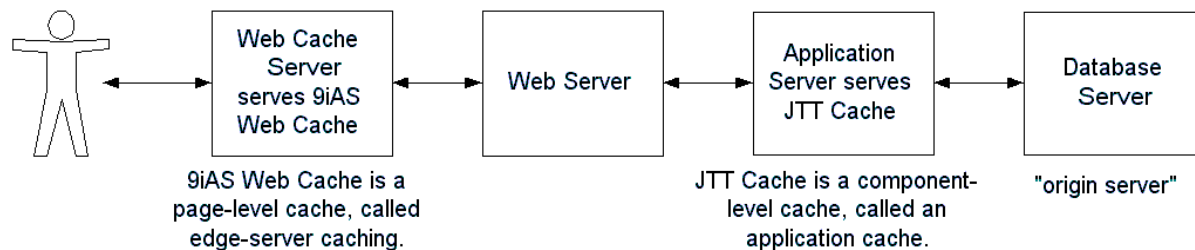
**Note:** Oracle iStore no longer supports the use of IBE Cache. You should use JTT Cache. For details on how to set up JTT Cache, see the *Oracle Applications CRM System Administrator's Guide*.

You also can integrate Oracle iStore with Oracle9iAS Web Cache to serve cached data. See [Chapter 33, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), for more information.

JTT Cache is a component-level cache known as an application cache. Oracle9iAS Web Cache is a page-level cache known as edge-server caching. These two types of caches do not interconnect in any way.

The following diagram, [Figure 18–1, "Web Caching in Oracle iStore, using Oracle9iAS Web Cache and JTT Cache"](#), explains the relationship between JTT Cache and Oracle9iAS Web Cache. The diagram depicts how when a user requests an object from a web page, the edge-server cache and application server cache deliver the objects to the page. If the cached data is not available, the system retrieves the objects from the origin server.

**Figure 18–1 Web Caching in Oracle iStore, using Oracle9iAS Web Cache and JTT Cache**



## 18.3 Setting up JTT Cache

Oracle iStore can use the Oracle CRM Technology Foundation (JTT) Cache to improve site performance.

For details on how to set up JTT Cache, see, *Oracle Applications CRM System Administrator's Guide*.

### 18.3.1 Component Caches for Oracle iStore in JTT

JTT Cache framework manages caches in two levels: component level and object level. A cache component is a collection of cached objects of the same type. Each cache component holds all the Java objects associated to an application. For example, IBE\_SECTION\_CACHE component contains all cached section objects, while IBE\_ITEM\_CACHE contains all item (product) objects.

Each application uses one or more component caches. Within each component cache, are component identifiers. Cached objects, which are striped by unique keys, are used almost everywhere in JSPs and Java classes. Where these objects are used is fully determined by business logic and the underlying implementation.

The following table, [Table 18–1, "Oracle iStore Component Caches"](#), shows the JTT component cache identifiers that are seeded in Oracle iStore. The table lists the Oracle iStore component identifier (component cache) and the what each identifier caches.

**Table 18–1 Oracle iStore Component Caches**

| iStore Component Identifier         | What it Caches                                                                                                                                                                                 |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IBE_ACCESSNAMEID_CTX_CACHE          | Programmatic access names of the display styles' logical IDs                                                                                                                                   |
| IBE_ADDRESS_VALIDATION_CACHE        | Address validation status for each operating unit                                                                                                                                              |
| IBE_ATTACHMENT_CACHE                | Stores attachment information                                                                                                                                                                  |
| IBE_CURRENCY_CACHE                  | Currency information, including currency symbol and translated currency names                                                                                                                  |
| IBE_FND_LOOKUP_CACHE                | FND Lookup value based on language -- the key is the column lookup_code (in FND_LOOKUP_VALUES) and the return value is the meaning column containing the actual phrase (e.g. shipping method). |
| IBE_INVORG_SHPMTHD_CACHE            | Shipping methods based on inventory organization ID                                                                                                                                            |
| IBE_ITEM_CACHE                      | Item objects                                                                                                                                                                                   |
| IBE_LAYOUT_COMPONENT_TEMPLATE_CACHE | Stores the template mapped to a section in a specific component of the layout                                                                                                                  |
| IBE_LOCALE_CACHE                    | Caches the locale for a given language                                                                                                                                                         |
| IBE_MEDIA_CACHE                     | Logical name to physical file mapping for multimedia components                                                                                                                                |

**Table 18–1 Oracle iStore Component Caches (Cont.)**

| <b>iStore Component Identifier</b> | <b>What it Caches</b>                                                                                                          |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| IBE_MEDIA_CTGCTX_CACHE             | Context of multimedia components for product categories                                                                        |
| IBE_MEDIA_DEFAULT_CACHE            | Context of default multimedia components                                                                                       |
| IBE_MEDIA_PRDCTX_CACHE             | Context of multimedia components for products and sections                                                                     |
| IBE_MEDIA_TEXT_CACHE               | Text media, i.e., Oracle Application Object Library messages                                                                   |
| IBE_MENU_CACHE                     | Stores iStore Customer UI menus retrieved from FND                                                                             |
| IBE_MSITE_AN_CACHE                 | Specialty site object by access name                                                                                           |
| IBE_MSITE_ID_CACHE                 | Specialty site object by Site ID                                                                                               |
| IBE_MSITE_RESP_CACHE               | Stores the SortedMinisiteResponsibilities object where the key is the language code                                            |
| IBE_OU_CACHE                       | Operating unit object, which stores information such as ship-to and bill-to countries                                          |
| IBE_PARTNUM_CACHE                  | Contains part number and Inventory ID mapping                                                                                  |
| IBE_PHONE_CODE_CACHE               | International phone code of each country -- the key is the territory code and the return value is the international phone code |
| IBE_PRINTED_TAXNAME_CACHE          | Cache of printed tax names based on tax code, organization ID, and language code                                               |
| IBE_QUOTE_STATUS_CACHE             | Caches quote statuses                                                                                                          |
| IBE_SEARCH_CATEG_CACHE             | Category-level product search LOV in sites' menu bars                                                                          |
| IBE_SEARCH_SECTION_CACHE           | Section search cache for Customer UI                                                                                           |
| IBE_SECTION_CACHE                  | Section objects and navigational hierarchy                                                                                     |
| IBE_STORE_LANGUAGE                 | Stores the SiteLanguage object where the key is the language code                                                              |
| IBE_STORE_PROFILE_CACHE            | Application-level profile option settings                                                                                      |
| IBE_STYLE_CACHE                    | Address style for each country                                                                                                 |
| IBE_TEMPLATE_CACHE                 | Logical name to physical file mapping for templates                                                                            |

**Table 18–1 Oracle iStore Component Caches (Cont.)**

| iStore Component Identifier | What it Caches                                   |
|-----------------------------|--------------------------------------------------|
| IBE_TEMPLATE_DEFAULT_CACHE  | Default context of templates                     |
| IBE_TEMPLATE_PRDCTX_CACHE   | Context of templates for products and categories |
| IBE_UOM_CACHE               | Units of measure and their translations          |

For information on how to set up and use JTT Cache, see:

- *Oracle Applications CRM System Administrator's Guide*

## 18.4 Setting up Secure Socket Layer Connections

Secure Sockets Layer (SSL) is a protocol that allows the transmission of private documents via the Internet. SSL works by using a public key to encrypt data that's transferred over the SSL connection.

Both Netscape Navigator and Internet Explorer support SSL, and many web sites use the protocol to obtain confidential user information, such as credit card numbers. By convention, URLs that require an SSL connection start with `https:` instead of `http:`.

Oracle iStore provides support for serving pages through SSL network connections, and can switch seamlessly between HTTP and HTTPS protocol. This reduces the hardware required to serve Oracle iStore pages through SSL. It also provides improved performance with HTTP for non-secure Oracle iStore pages, such as the catalog pages.

Pages that are SSL-enabled are considered secure, while pages that are not served through SSL are considered non-secure.

This section contains:

- [Section 18.4.1, "Enabling SSL Switching"](#)
- [Section 18.4.2, "SSL and Non-SSL Enabled Pages in Oracle iStore"](#)
- [Section 18.4.3, "Setting JTT JVM Cookie Parameters"](#)

### 18.4.1 Enabling SSL Switching

To enable protocol switching between secure and non-secure URLs, set the following profile option:

- IBE: iStore Secure URL --- Set to the base URL where HTTPS is installed.
- IBE: iStore Non Secure URL --- Set to the base URL where HTTP is installed. See [Section 33.2.2, "Using Oracle9iAS WebCache with SSL"](#), for information on Oracle 9iAS WebCache and SSL.

See [Section A.13, "Caching and SSL Profile Options"](#), for more information about these profiles.

These URL parameters enable the application to recognize hostnames and ports. If you do not want to support protocol switching, leave the profiles blank.

When you set these profile options, hyperlinks that cause a transition from SSL to non-SSL and vice versa become absolute. Also, hyperlinks that are shared by both SSL and non-SSL pages become absolute. Absolute hyperlinks have the following HTML syntax:

```
<a href="https://<host>:<port>/OA_HTML/ibeCAcdLogin.jsp?a=b">
```

In contrast, relative hyperlinks have the following syntax:

```

```

#### 18.4.1.1 Accessing the Database with a Private Middle Tier

Your support team may need to access the database using its own private middle tier. For example, if your HTTPS server is down for maintenance, the team may need this access to test other functionality. To allow access to the database with a private middle tier, you will need to make all hyperlinks relative.

You can make the hyperlinks relative by appending "?intra=t" to your Oracle iStore home page URL.

Use the following procedure to make the hyperlinks relative.

#### Steps

1. Navigate to the following URL:

```
http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?intra=t
```

2. The page opens. All hyperlinks are now relative to the following URL:

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

### 18.4.2 SSL and Non-SSL Enabled Pages in Oracle iStore

The following table summarizes which Oracle iStore components have SSL-enabled pages and which do not.

**Table 18–2 Oracle iStore Secure and Non-Secure Pages**

| SSL-Enabled Pages                                                                                                                                                                               | Non-SSL-Enabled Pages                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>■ Login</li><li>■ Cart Saving and Sharing</li><li>■ Checkout Flow</li><li>■ Express Checkout</li><li>■ Customer Profile</li><li>■ Order History</li></ul> | <ul style="list-style-type: none"><li>■ Catalog</li><li>■ Shopping Cart</li></ul> |

### 18.4.3 Setting JTT JVM Cookie Parameters

If your HTTP and HTTPS servers are set up in different sub-domains and paths, two JVM parameters must be set in Oracle CRM Technology Foundation so that the session cookies are sent to both servers. The following are the parameters:

- jtt\_cookie\_domain
- jtt\_cookie\_path

**Example:**

If the HTTP server is `http://www.xyz.com/path1` and the HTTPS server is `https://secure.xyz.com/path2`, the JVM parameters should be set as follows:

- jtt\_cookie\_domain=xyz.com
- jtt\_cookie\_path=

For instructions on how to set these parameters in the Oracle CRM System Administrator’s Console, see the *Oracle Applications CRM System Administrator’s Guide*.





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## Verifying the Implementation

This chapter describes the tasks required to verify your implementation of Oracle iStore 11*i*.

Main topics in this chapter include:

- [Section 19.1, "Oracle iStore Implementation Verification Tasks"](#)

### 19.1 Oracle iStore Implementation Verification Tasks

Once you have launched your sites, you can continue to test and verify additional changes to the catalog before making the changes public. See [Section 19.1.2, "Using Preview Mode"](#) for more information on testing the appearance of products and sections in your specialty sites.

#### 19.1.1 Testing the Sites

Use the following procedure to test your specialty sites before launching them.

##### Prerequisites

A site has been created, and a supported iStore responsibility has been assigned to it.

##### Steps

1. Navigate to the Site Selection Page at the following URL:

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

If you are using the Site Selection Page, this page allows you to navigate to any of your specialty sites, and to sign in if necessary. If you are not using the Site Selection Page, you are automatically rerouted to the default specialty site or, if

the default specialty site is not available to you, to the first specialty site you can access with your user responsibility.

2. Optional: You can also access a site's specialty sites directly at the following URL:

```
http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?site=<Store ID>
```

**Note:** Site ID (formerly called Minisite ID) is viewable in the Update Site: Details page. This is a unique identifier given to the site upon creation.

## 19.1.2 Using Preview Mode

Oracle iStore's Preview mode allows merchants to preview Customer UI specialty sites while working on them in the Site Administration UI.

Use the Preview feature of Oracle iStore to preview the appearance of your specialty sites, sections, and products before making them available to customers. Preview mode is available in the Sites, Sections, and Products pages.

This section discusses the following:

- [Section 19.1.2.1, "Preview and Transactions"](#)
- [Section 19.1.2.2, "Preview and Web Cache"](#)
- [Section 19.1.2.3, "Preview and Languages"](#)
- [Section 19.1.2.4, "Accessing Preview Mode"](#)

### 19.1.2.1 Preview and Transactions

You cannot perform any transactional processes in Preview mode, such as place orders, check out, log out, etc. The only purpose of Preview mode is to browse the catalog. Icons at the top of the page and links in the Browse Bin are not selectable. If you select the **Add to Cart** button, an error message, *Transaction is disabled in Preview mode* will be shown.

### 19.1.2.2 Preview and Web Cache

In a typical scenario, when the merchant selects the Preview button in Site Administration UI, the Customer UI is retrieved through the application server and uses data cached through JTT Cache. This ensures freshly cached data. Changes made by the site manager in the Site Administration UI are immediately viewable in the Customer UI.

There may be cases however, when the merchant enters Preview mode through the Oracle 9iAS Web Cache. This type of preview, however, is not supported due to likelihood of seeing stale cached data. See [Chapter 33, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#), for more information.

### 19.1.2.3 Preview and Languages

When previewing a specialty site, a section, or a product, in the preview site window, specialty sites which do not support the iStore administrator's current session language **will not be listed**. For example, if the iStore administrator's current session language is German, specialty sites which do not support the German language will not appear in the site list.

### 19.1.2.4 Accessing Preview Mode

You can access **Preview** mode in one of two ways:

1. Select the **Preview** button in the Sites, Sections, and Products pages, and then select the name of the specialty site you wish to preview. All products and sections, whether published or unpublished, will display.
  - **Preview from Sites pages:** Select Preview to bring up a list of specialty sites within the site. Or, if only one specialty site exists within the site, you will immediately see the Site Home Page for the specialty site.
  - **Preview in Products pages:** Select Preview to view the product detail page for that product. If more than one site or specialty site includes the product, you will need to first select a specialty site from the list that appears.
  - **Preview in Section pages:** Select Preview to be taken to the specific section page. If more than one site or specialty site includes the section, you will need to first select a specialty site from the list that appears.
2. Navigate to the Customer UI URL using the iStore Administrator responsibility. When the site manager (user with iStore Administrator responsibility) logs into the Customer UI while still logged into the Site Administration UI and using the same browser, he will be in Preview mode and will be able to see all sites, whether available to customers or not, and all products, whether published or unpublished.



---

## Diagnostics and Troubleshooting

This section contains instructions on error corrections and troubleshooting for problems that you may encounter in configuration or administration of Oracle iStore 11*i*.

Main topics in this chapter include:

- [Section 20.1, "Oracle CRM Diagnostics"](#)
- [Section 20.2, "Browser Cookies and Oracle Java Applications"](#)
- [Section 20.3, "Setting up User-Level Logging"](#)
- [Section 20.4, "Technology Stack Debugging"](#)
- [Section 20.5, "Receiving Diagnostic Messages"](#)
- [Section 20.6, "Site Administration UI Errors"](#)
- [Section 20.7, "Customer UI Login Errors"](#)
- [Section 20.8, "Display Manager Errors"](#)
- [Section 20.9, "Catalog Errors"](#)
- [Section 20.10, "Pricing Errors"](#)
- [Section 20.11, "Search Errors"](#)
- [Section 20.12, "Notifications Errors"](#)
- [Section 20.13, "Lead Import Errors"](#)
- [Section 20.14, "Fulfillment Errors"](#)
- [Section 20.15, "Potential Issues Installing Oracle8i interMedia Text Version 8.1.7"](#)

Note: For troubleshooting Oracle Configurator integration, see [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#).

## 20.1 Oracle CRM Diagnostics

Oracle CRM Diagnostics is a tool that provides system integrators, consultants, and support analysts with a robust troubleshooting aids for diagnosing and troubleshooting Oracle 11i products.

The diagnostic tests provided as part of the Oracle Diagnostics Support Pack gather information and perform a set of tests on that information. The results include the output of information gathered, the results of the tests and appropriate actions to take. The tests provided do not alter data or setup.

The Support Packs are updated and released on a monthly basis and include the latest updates to existing tests and all new tests that are available.

For more information, see Note 167000.1 on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

See also: [Section 20.3, "Setting up User-Level Logging"](#)

## 20.2 Browser Cookies and Oracle Java Applications

Sometimes, clearing all browser cookies can solve errors that occur when accessing Oracle's Java-based applications. To do so, follow the steps relevant to the browser you are using.

### 20.2.1 Steps to Check JTT Cookie Properties

You may use the following steps to check the JTT cookie properties:

1. Login to the Oracle E-Business Suite HTML login (JTF login) as system administrator.
2. Select Settings > System > Properties > Advanced.
3. Select JTF from the View drop-list to view only JTF properties.
4. Navigate to desired property cookie\_name and select it. The Key Details page appears, where the current property values are displayed in Sequence.

### 20.2.2 How to Find the JTT Session Cookie Name

You can also find the JTT Session Cookie name by doing the following:

1. Enable cookie prompt in your browser.
2. Clear your browser cookies.

3. Go to your Site Home Page. You should be able to see the JTT Session Cookie name in one of the pop-up windows.

## 20.3 Setting up User-Level Logging

Oracle iStore allows user level logging of debug messages. This feature creates separate user log files for the JSP/Java and PL/SQL layers. You should only use this feature to diagnose problems in the application.

You can activate user-level logging by setting the profile option IBE: Enable Debug to Yes at the user level for a specific user.

If you want to enable log files for Oracle Order Capture, set the profile option ASO: Enable ASO Debug to Yes at the user level. This will ensure that Oracle Order Capture-related logging messages will appear in the PL/SQL log files along with those for Oracle iStore, Oracle Order Management, and Oracle Pricing.

**Important:** If you have set the IBE: Debug profile option to Yes for a user, verify or set the profile option OM: Debug Log Directory at site level to a directory that is writable by the database server. Oracle iStore Customer UI user-specific logs for the PL/SQL layer are written in this directory.

### 20.3.0.1 Steps to Set up JSP/Java Level Logging

1. Set the profile option IBE: Enable Debug to Yes at user level for a user.

When a user logs in to the Oracle iStore Customer UI, the application creates a user-specific log file in the same directory as the system log file. As long as the user session is valid, all log messages are written to the same log file.

The file name has the syntax IBE\_<Username>\_<Random Number>.log.

2. Note that the log directory in which Oracle iStore resides is specified in the Jserv Property file.

**Example:** If Jserv.properties has:

```
wrapper.bin.parameters=-Dserv.Logging.common.filename=D:\temp\ibe.log
```

at runtime you will have a log filename like:

```
D:\temp\ibe.log_3_1afaef486a7fd3aa8000_IBE.txt
```

### 20.3.0.2 Steps to Set up PL/SQL Level Logging

1. Set the profile option IBE: Enable Debug to Yes at user level for a user.
2. Set the profile option OM: Debug Log Directory at site level to a directory that is writable by the database server.
3. Set the init.ora UTL\_FILE\_DIR parameter to point to the same directory.

When a user logs in to the Oracle iStore Customer UI, the application writes all log messages for the user to a user-specific log file in the directory specified by OM: Debug Log Directory.

The file name has the syntax IBE\_<Username>.log.

## 20.4 Technology Stack Debugging

You may need to perform debugging on the Oracle CRM Technology Foundation technology stack. This might be necessary if, for example, you are receiving request time-out or login errors. If you have contacted Oracle Support, your support agent may ask you to set up the technology stack debugging.

In this case, in order to enable the Oracle CRM Technology Foundation logging trails, set the framework and service logging levels to `DEBUG`.

**Note:** For performance reasons, it is recommended that you only enable debugging on the technology stack if it is required.

For more information, see:

- *Oracle CRM Technology Foundation Implementation Guide*
- *Oracle CRM Technology Foundation User Guide*

## 20.5 Receiving Diagnostic Messages

When there is an Oracle iStore application error in the sites, such as an exception, Oracle iStore delivers a diagnostic e-mail message to any e-mail address that you specify. The diagnostic message contains the exception message and the application context. You can specify the e-mail address in the profile option IBE: Email Address to send Diagnostic Messages. See [Section A.12.0.111, "IBE: Email Address to Send Diagnostic Messages"](#), for more information on the profile settings.



## 20.6 Site Administration UI Errors

This section contains errors which may occur when using the Oracle iStore Site Administration UI.

Topics include:

- [Section 20.6.1, "Understanding Browser Reload Action"](#)
- [Section 20.6.2, "Section Hierarchy Errors"](#)
- [Section 20.6.3, "Reports Errors"](#)

### 20.6.1 Understanding Browser Reload Action

In the Site Administration UI, when a user selects the Internet browser's Reload/Refresh button just after pressing the iStore Apply button, the browser does not just reload the page with the http "get" command, it repeats the last action (send the last request again). This means the browser will resubmit the form again with all the old form data. This may cause an error to display in the UI. It is recommended that the user not press the browser's Reload/Refresh button just after pressing the Apply button.

**Explanation:** All iStore tables have one column, `object_version_number`, to ensure that when a user submit a form, the data is not stale. If user submits the form again with all of the "old" form data by selecting the browser's Reload/Refresh button, sometimes an error will be shown to indicate that the object version number is not correct.

### 20.6.2 Section Hierarchy Errors

Use the following fix for the error listed below.

#### **Cannot Find Item to Add to Section**

If you want to add an existing Oracle Inventory item to a section and cannot find the item, then check the following:

- In Oracle Inventory, check the Web Status flag for the item. If the item is Disabled, it will not appear in the Site Administration UI.

## 20.6.3 Reports Errors

This section contains troubleshooting information on errors which may occur when accessing Reports in Oracle iStore. For information on setting up Reports, see [Chapter 16, "Implementing Reports"](#).

This section addresses the following:

- [Section 20.6.3.1, "Netscape Errors When Accessing Discoverer Reports"](#)
- [Section 20.6.3.2, "Real Player Initializes in IE 5.0+ when Accessing Discoverer Reports"](#)
- [Section 20.6.3.3, "Description Under Bins Not Aligned Properly"](#)
- [Section 20.6.3.4, "Discoverer Reports Tab Shows "Additional Steps Required" Message"](#)

### 20.6.3.1 Netscape Errors When Accessing Discoverer Reports

When accessing Discoverer reports in the Site Administration UI Reports tab, the following error may occur in Netscape:

```
Error: PL/SQL: numeric or value error: character buffer too small
```

**To fix the problem:** Clear the browser cache and cookies, by doing the following:

1. In the Netscape Browser menu, navigate to Edit > Preferences > Advanced > Cache.
2. Click on the buttons Clear Memory Cache and Clear Disk Cache.
3. Close all Netscape browser windows and remove all cookies files from your PC:

On Windows, it might be present in <Netscape Directory> \ Users\  
<NetscapeUserProfileName>\cookies.txt

E.g.: C:\Program Files\NETSCAPE\Users\"User\_name"\cookies.txt

### 20.6.3.2 Real Player Initializes in IE 5.0+ when Accessing Discoverer Reports

When accessing Discoverer reports in the Site Administration UI Reports tab, Real Player may try to initialize.

**To fix the problem:** Clear the browser cache and cookies, by doing the following:

1. In the IE browser menu, navigate to Tools > Internet Options.
2. Select the Delete Files button.

3. In the Delete Files window, check Delete all offline content checkbox and select Ok.
4. Select the Settings button to open the Settings window.
5. Select View Files to open the Temporary Internet Files window. Select and Delete all cookie content in the window. The above steps delete all temporary files.
6. Close all IE browser windows.
7. Delete all the cookie files, for IE, for this Windows user.

**Example:** If the cookies for IE are stored under C:\Documents and Settings\<Windows Username>\Cookies directory, then delete all the files from this directory.

### 20.6.3.3 Description Under Bins Not Aligned Properly

When using Internet Explorer, the text underneath bins (in Bins subtab under Reports tab) may not be aligned properly. This error occurs because "write" directory permissions are not set in the directory \$APPL\_TOP/HTML/cabo/styles/cache, and the DCF renderer cannot generate the proper cascading style sheet. To fix the error, set "write" privileges in the directory.

After making these changes, be sure to bounce the Apache with the Clear Cache option on.

### 20.6.3.4 Discoverer Reports Tab Shows "Additional Steps Required" Message

If the Discoverer Reports tab shows the following message:

Post installation/configuration steps are required to correctly run the reports

The exact cause of the error can be found in the JTF log files. Also, from Minipack IBE.N and onwards, the view source of the Discoverer Reports tab page should also give information on the issue.

To fix the issue:

1. Upload the eex files.
2. Set the values for the Discoverer profile options correctly.

Usually, this error happens because of the following reasons:

1. The **ICX: Default End User Layer Prefix** profile option (ICX\_DEFAULT\_EUL) has not been set properly. The profile option value might contain the LANG suffix too (e.g.: EUL4\_US). This profile should contain value without the suffix, e.g., EUL4 (no US).
2. Oracle Applications Discoverer Reports are currently not supported for a language preference of the logged-in user other than American English.
3. IBE eex files have not been uploaded/error in importing the eex files: To check whether the IBE Workbooks have been uploaded or not, run the following query:

```
SELECT DISTINCT doc_developer_key FROM EUL4_US.eul4_documents WHERE doc_developer_key LIKE 'IBE%';
```

If the above query does not return any records, then eex import has not been done properly.

**For more information:**

Read *OracleMetaLink Note 185342.1, Oracle Discoverer End User Layer (EUL) Release Notes*. **To obtain Note 185342.1:** Log into [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) and query with Note 185342.1 in the search utility.

## 20.7 Customer UI Login Errors

If a user is experiencing errors when trying to log in to a specialty site, the cause may be one of the following:

1. You are logging in to Oracle CRM Applications at:  
`http://<host>:<port>/OA_HTML/jtflogin.jsp`  
instead of the Customer UI at one of the following URLs:  
`http://<host>:<port>/OA_HTML/ibeCZzdMinisites.jsp`  
`http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?site=<Store ID>`
2. You are trying to log in with a site manager user name instead of a customer user name. Make sure the user name has an Oracle iStore customer responsibility such as IBE\_CUSTOMER.
3. The person party setup for a user in TCA is not correct
4. The organization associated with a B2B user is not valid

5. The relationship between an B2B user and an organization is not valid
6. The B2B user has no valid account in TCA.

When any of these errors occur, an error message will be displayed in Customer UI. Users can contact their system administrator to check the setup.

## 20.8 Display Manager Errors

Use the following fixes and workarounds for the Display Manager error messages listed below.

### **TemplateNotFoundException or MediaNotFoundException**

This error occurs when the method `DisplayManager.getURL()`, `DisplayManager.getTemplate(accessName)`, or `DisplayManager.getMedia(accessName)` is used.

- Verify that the template or media was created in the Site Administration UI by searching for it by access name in the Site Administration UI.
- Verify if the template or media has the mapping for the specific site and language. If not, verify if the template or media has default mapping.
- Reboot the server.
- Check the log file for diagnostic messages.

### **NullPointerException (Template or Multimedia Object is Null)**

This error occurs when the method `Item.getTemplateFileName()`, `Section.getTemplateFileName()`, or `Display Manager.getSectionMedia(...)` is used.

This error indicates that a product or section mapping to a template or media was not defined and that a site level default also was not defined.

- Verify if any template or media is mapped to the product or section under the specified display style or content component.
- Verify if the template or media exists.
- Verify if the template or media has the mapping for the specific site and language. If not, verify if the template or media has default mapping.
- If the category default is in use, check whether a mapping has been defined at the category level for the requested display style.

- Verify that the specified display styles or content components are referenced in the runtime JSP.
- Verify that the product or section cache was cleared after the mapping was created.
- Check the log file for diagnostic messages.

### **New Template (or Multimedia) Has Been Associated with a Product/Category/Section, But Won't Show Up at Runtime**

- Verify that the association was created in the Site Administration UI.
- Verify that the specified display styles or multimedia components are available.
- Verify that the product or section cache was cleared after the association was created.
- Check the log file for diagnostic messages.

## 20.9 Catalog Errors

To troubleshoot Catalog errors, use the checkpoints or the following fixes for specific error messages.

This section contains:

- [Section 20.9.0.5, "Checkpoints"](#)
- [Section 20.9.1, "Specific Error Messages for Catalog"](#)

### **20.9.0.5 Checkpoints**

- View the JSP source in the web browser and look for a stack trace.
- Check the log file for a stack trace.
- If you know the JSP or Java method in which the error occurred, search the log file for debug statements from the JSP or method.
- If a specialty site page does not appear, verify whether the problem is with the database, Apache server, connection, or JTT/AOL as follows:
  1. Go to the following URL:

`http://<host>:<port>/html/jtfmain.htm`

This page has links to test the basic functionalities that Oracle iStore depends on.

If the page itself does not appear, the problem is with the database connection.

2. Follow the instructions on the page and use the links to check for environment problems.
- If an eMerchandising posting from Oracle Marketing does not show up in the Oracle iStore catalog, check the following points:
    - Oracle Marketing is installed.
    - The profile option IBE: Use Web Placements is set to Yes at site level.
    - The centralized posting JSP (ibecpstg.jsp or ibeCCtpPostingI.jsp) is modified to set the correct posting ID value.
    - After modifying the centralized posting JSP, the following pages were removed from the `_pages` directory and recompiled: `ibec*.java`, `ibescdch.java`, `ibeCCt*.java`, `ibeCScdViewA.java`, `ibec*.class`, `ibescdch.class`, `ibeCCt*.class`, and `ibeCScdViewA.class`.
    - If Oracle iStore has successfully displayed other types of eMerchandising postings, the problem may be due to an Oracle Marketing setup issue or other Oracle Marketing problem.

## 20.9.1 Specific Error Messages for Catalog

Use the following fixes and workarounds for the error messages listed below.

- [Section 20.9.1.1, "No Items in the Catalog"](#)
- [Section 20.9.1.2, "Items Do Not Have Prices"](#)
- [Section 20.9.1.3, "'Add to Cart' Buttons Do Not Appear"](#)
- [Section 20.9.1.4, "Please Refresh Your Shopping Cart"](#)
- [Section 20.9.1.5, "ORA-20000: APP-11027: Mandatory Segment: 'COUNTY'"](#)

### 20.9.1.1 No Items in the Catalog

- Check the following profile options:
  - IBE: Item Validation Organization
  - MO: Operating Unit

- Check the Oracle Inventory Item setup for items that should appear in the catalog. They must have the following setup:
  - Web Status = **Published**
  - start\_date\_active is NULL or <=SYSDATE
  - end\_date\_active is NULL or >=SYSDATE
  - The item's primary unit of measure is in MTL\_UNITS\_OF\_MEASURE\_VL.
  - The item is available in the user's organization. A user only sees items in his or her inventory organization. You can check the Oracle iStore log file for "Organization Id" to see the value of the user's Inventory Organization ID.
- If there are configurable items in the catalog, confirm that their components' item setups are also correct. Otherwise, their descriptions will not appear in Oracle iStore.
- Check that the items have not been explicitly excluded from the site.

### 20.9.1.2 Items Do Not Have Prices

- Check the following profile options:
  - IBE: Pricing Event—Before Shopping Cart
  - IBE: Request Type to get a Price (for pre-11.5.8 only)
  - IBE: Use Price List Associated with Specialty Site
- Confirm that items are in the site price list.
- Confirm that the site has the correct price lists for walk-in and registered B2B and B2C users.
- Confirm that the price list has item prices for the correct UOMs.
- Confirm that the price is set up correctly in Oracle Pricing.
- Check the log file for the pricing API, Item.getListAndBestPrices(), that is being called. Confirm the values that Oracle iStore passes to the Pricing engine: price list ID, currency code, inventory item IDs, UOM codes, price request type, and pricing event. Oracle iStore only passes party ID and account ID for user-specific pricing. Check the values that Oracle Pricing returns: status code and status text.
- Status Code from Pricing Engine



- UPDATED
- DUPLICATE\_PRICE\_LIST
- INVALID\_UOM
- IPL: Invalid price list ID, that is, a non-existent price list.
- If prices for model bundles do not display, make sure the model bundles are set up correctly as described in [Section 22.3, "Implementing Oracle Bills of Material"](#).
- If items for model bundles do not display and you are running a multi-org setup, then make sure that you have copied the bill to all of the appropriate organizations. When you create a bill, it exists only in the current organization.
- If the profile option IBE: Use Price List Associated with Specialty Site is set to **No**, check the following setups:
  - Set the profile option ASO: OM Defaulting to Yes at the desired level: site, application, responsibility, or user.
  - Log in to Oracle Forms with the Oracle Pricing Manager responsibility. Choose Setup > Event Phases. Query for all event phases. Set Search Flag to Yes for the pricing event "LINE" in all phases.
  - Log in to Oracle Forms with the Oracle Pricing Manager responsibility. Choose Price Lists > Price List Setup. Search for the price list in question. Make sure the precedence at the product level is set correctly so that Oracle Pricing can resolve to a single price list.

For example, if there are only two price lists defined, Price List A and Price List B, and all users qualify for both price lists, and if both price lists contain Product X with precedence 220, then Oracle Pricing returns an error because it cannot choose a single price list. If the Product X precedence is 100 in Price List A and 220 in Price List B, Oracle Pricing can resolve to Price List A.

- To confirm that the defaulting row is set up correctly in Oracle Order Management, log in to Oracle Forms with the Order Management Super User responsibility. Choose Setup > Rules > Defaulting. Search using the criteria of Application = Oracle Order Management and Entity = Order Header. Select Order Type from the Attributes section and select Defaulting Rules. Add an entry in the Default Sourcing Rules with the following information:
  - Sequence = 1

- Source Type = Constant Value
- Order Type = Standard

### 20.9.1.3 “Add to Cart” Buttons Do Not Appear

“Add to Cart” buttons are not displayed for items that are not orderable on the web and for items that do not have defined prices.

- Check that the item setup has Orderable on the Web checked in Oracle Inventory.
- Check the price setup.
- Confirm that the item’s BOM item type is not OPTION class.
- If the item’s BOM item type is MODEL, the item must either have the Oracle Configurator UI setup or follow the model bundle setup. Otherwise, it will be treated as a standard item.
- Check the value of the profile option, IBE: Use Add Item Bin -- it should be set to Yes.
- Check that the item’s Inventory flag, Orderable on the Web, is set to Yes.

### 20.9.1.4 Please Refresh Your Shopping Cart

This error may occur when customers try to add items to a cart and the ASO: Default Quote Status profile option is not set properly. To fix the error, set the profile option to `Store Draft` at the iStore application level.

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

### 20.9.1.5 ORA-20000: APP-11027: Mandatory Segment: "COUNTY"

The following SQL error occurred: ORA-20000: APP-11027: Mandatory segment: "COUNTY".

This is an error that can occur with flexible addresses when address validation is turned **off**.

The error message means that the mandatory segments of an address -- such as city or state -- are missing. It is possible that the address is created where address validation is not required, or from another application which does not verify all the information in the address.

To remove the error, set address validation on. To check whether address validation is on, do the following:

1. Login to Oracle Forms using Receivables Manager responsibility.
2. Navigate to Setup > System > System Options.
3. Open the Tax tab and check the value for Address Validation. Validation is on if it's set to Error.

If the address validation is turned off and the location flexfield is `city.county.state`, the Accounts Receivables API tries to calculate tax based on city, county, and state during checkout. If the mandatory information is missing from the address, a user will see the error.

## 20.10 Pricing Errors

To troubleshoot Pricing errors, use the following checkpoints and debugging procedures.

See also: [Chapter 10, "Implementing Pricing"](#)

### 20.10.0.6 Checkpoints

Use the following checkpoints to troubleshoot pricing in Oracle iStore.

- If you want to use the Oracle Pricing engine to determine which price list to use in Oracle iStore, then set the profile option IBE: Use Price List Associated with Specialty Site to No. See [Section A.8.0.85, "IBE: Use Price List Associated with Specialty Site"](#), for more information on this profile option.
- When you create a new modifier, run the Build Sourcing Rules concurrent program with the Pricing Manager responsibility.
- Check that the profile options, IBE: Pricing Event for Shopping Cart and IBE: Pricing Event--Before Shopping Cart, are set as mentioned in [Section 4.2.3, "Set Mandatory Customer UI Profile Options"](#).

## 20.10.1 Generating a Pricing Debug Trace

You can generate a pricing debug trace to create detailed log files when Oracle iStore calls the Oracle Pricing engine. Oracle iStore creates two log files because it calls the Oracle Pricing engine twice, once in the catalog and once in the shopping cart. The call from the catalog goes directly to Oracle Pricing. The call from the shopping cart is performed through Oracle Quoting, resulting in additional quote-related information in the log file.

Use the following procedure to generate the pricing debug trace.

### Steps

1. Set the profile option QP: Debug to Yes at the user level for the username that you are testing.
2. Set the profile option OM: Debug Log Directory at the site level to the value of the init.ora UTL\_FILE\_DIR parameter. To find this value, perform the following SQL\*Plus query:

```
select value
from v$parameter
where name='utl_file_dir';
```

3. Log in to the Oracle iStore Customer UI as the user that you are testing.
4. Perform the pricing activity that you are trying to debug.
5. In the operating system, navigate to the directory specified in the profile option OM: Debug Log Directory.
6. In this directory, locate the file named <Random Number><Username>.dbg. This is the debug trace for the user and session.
7. As you read the debug trace file, keep in mind the following common reasons for discounts not being applied:
  - Discount list header is inactive.
  - Discount list header is ineffective as of the pricing date.
  - Source system code on discount list is not correct. (Look at this for Oracle iStore orders.)
  - Discount list line is ineffective as of the pricing date.
  - Qualifiers for the discount list are not met.
  - Pricing attributes for the discount list are not met.

- Discount list is getting eliminated by incompatibility.
- Price break discount conditions are not met.

## 20.11 Search Errors

To troubleshoot Search errors, use the following checkpoints:

- Check that Concurrent Manager is up and running.
- If searches are inaccurate, verify that interMedia was set up correctly. Refer to [Section 20.15, "Potential Issues Installing Oracle8i interMedia Text Version 8.1.7"](#).
- Look for data stored in the indexed search column.
- If you add multiple items that do not appear in the search table, re-run the Concurrent Manager program Store Search Insert. This program populates the search table in Oracle iStore with product information from the Oracle Inventory tables.

---



---

**Note:** The search function goes offline while Store Search Insert is running.

---



---

- Verify that the listener.ora and tnsnames entries are correct so that the callout to the .dll can be made. For UNIX, refer to [Section 20.15, "Potential Issues Installing Oracle8i interMedia Text Version 8.1.7"](#).

For Windows NT, refer to the following example.

```
listener.ora

LISTENER =
 (DESCRIPTION_LIST =
 (DESCRIPTION =
 (ADDRESS_LIST =
 (ADDRESS = (PROTOCOL = IPC) (KEY = EXTPROC0))
)
 (ADDRESS_LIST =
 (ADDRESS = (PROTOCOL = TCP) (HOST = sthattil-pc) (PORT = 1521))
)
)
 (DESCRIPTION =
 (PROTOCOL_STACK =
```

```
 (PRESENTATION = GIOP)
 (SESSION = RAW)
)
 (ADDRESS = (PROTOCOL = TCP) (HOST = sthattil-pc) (PORT = 2481))
)
)

SID_LIST_LISTENER =
(SID_LIST =
(SID_DESC =
(SID_NAME = PLSExtProc)
(ORACLE_HOME = E:\Oracle\Ora81)
(PROGRAM = extproc)
)
(SID_DESC =
(GLOBAL_DBNAME = ORCL)
(ORACLE_HOME = E:\oracle\ora81)
(SID_NAME = ORCL)
)
)

tnsnames.ora

EXTPROC_CONNECTION_DATA.US.ORACLE.COM =
(DESCRIPTION =
(ADDRESS_LIST =
(ADDRESS = (PROTOCOL = IPC) (KEY = EXTPROC0))
)
(CONNECT_DATA =
(SID = PLSExtProc)
(PRESENTATION = RO)
)
)
```

If the code is correct, refresh the dr\$libx so it can find the .dll to create the index (my oractxx8.dll is in my \$ORACLE\_HOME\bin directory). The command to recreate the library is:

```
create or replace library dr$libx as 'e:\oracle\ora81\bin\oractxx8.dll';
```

Start the ctxsrv and re-index.

- If you have implemented category-level search and the search is not working, run the following search query in SQL\*Plus:

```

select i.inventory_item_id, i.description, i.category_id,
 score(100) nearness
from ibe_ct_imedia_search i, mtl_system_items_b b
where contains (i.indexed_search, 'laptop' , 100) > 0
and i.language = userenv('LANG')
and i.category_id = i.category_id
and i.organization_id = 204
and exists (
 select 1
 from jtf_dsp_section_items s, jtf_dsp_msite_sct_items b
 where s.section_item_id = b.section_item_id
 and b.mini_site_id = 10120
 and s.inventory_item_id = i.inventory_item_id
 and (s.end_date_active > sysdate or s.end_date_active is null)
 and s.start_date_active < sysdate
)
and rownum < 200
and i.inventory_item_id = b.inventory_item_id
and i.organization_id = b.organization_id
order by SCORE(100)
/

```

The query will probably return ORA errors that indicate that the problem is with the environment, and not with the Oracle iStore product search.

If the query returns search results instead, then file a bug on Oracle iStore (product code 384, component SEARCH).

- If you get the error "IBE\_DSP\_J\_GET\_ITM\_LST\_FAIL: Unable to get list of product items in Site Administration UI" when you try to perform a product search in the Site Administration UI, then you are not including the wildcard character % in your search keyword. You must enter the wildcard character if you do not know the exact name of the product that you want. Alternatively, you can apply patch 1460870 to modify the code so that a wildcard character is automatically included if the search keyword field is left blank (null).

## 20.12 Notifications Errors

Use the following fix for the error listed below.

### 20.12.0.1 Notifications Are Not Delivered or Have Errors

This error occurs if you did not remove the access locks from the messages and items of the Oracle iStore-related Oracle Workflow definition before upgrading

Oracle iStore. The patch or upgrade cannot overwrite the Oracle Workflow definition if you do not first remove the access locks.

Use the following procedure to back up the necessary customized messages, remove the access locks, and apply the patch or upgrade again to fix this error.

### Steps

1. Open the Oracle Workflow data store file (IBENOTIF.wft) that contains this item type.
2. In Oracle Workflow Builder, back up the item type iStore Alerts Workflow (IBEALERT) as follows:
  - a. Choose File > Save As.  
The Save As window opens.
  - b. In the Save As window, highlight the File radio button, enter the file name, and select OK.
3. Unlock all seeded objects, such as messages, in the database copy of the item type iStore Alerts Workflow (IBEALERT). To do so, perform the following steps for each seeded Oracle Workflow object in the item type:
  - a. Select the object.
  - b. Choose Edit > Properties.  
The Navigator Control Properties window opens.
  - c. In the access tab, uncheck the options Preserve Customizations and Lock at this Access Level.
  - d. Click OK.
4. Save the Oracle Workflow data store file back to the database.
5. Apply the patch or upgrade to overwrite the existing Oracle iStore-related Oracle Workflow definitions.

## 20.13 Lead Import Errors

This section contains troubleshooting information for Oracle iStore's Lead Import functionality, which captures customer data from iStore orders and expired carts and makes them available in Oracle Sales Online and Oracle TeleSales.



### 20.13.0.2 Leads Have No Owner

If leads retrieved in Oracle Sales Online or Oracle TeleSales have no owner, check the value of the profile option, OS: Assign New Lead. This profile option attempts to assign a sales representative as the owner of a batch of leads.

- See [Section 29.5.2, "Oracle Sales Profile Options Required for iStore Lead Import"](#), for details.

### 20.13.0.3 Lead Data Overlaps

If the data in your leads overlaps or shows duplicate records, you may not have synchronized the iStore Lead Import Concurrent Program Set schedule and the interval profile options which also control how often the concurrent program set runs.

- See [Section 29.6.1.1, "Best Practice for iStore Lead Import Concurrent Program Set"](#), for details.

## 20.14 Fulfillment Errors

To fix issues with Postsales, first verify that the following prerequisites were done.

- All the views in Postsales are "VALID" in the database.
- Regions exist in Apps. Use the developer responsibility AK Developer or Apps for the Web Manager.
- Shipments, invoices and payments were created by the merchant through ERP applications before trying to view them in Oracle iStore.

### 20.14.0.4 Order Summary Page Records Out of Sequence

If the order summary page records are out of sequence, use search to locate an order.

### 20.14.0.5 Order Feedback Queue Errors

If you are experiencing order feedback queue errors, see *Oracle Quoting Implementation Guide* for troubleshooting instructions.

## 20.15 Potential Issues Installing Oracle8i/interMedia Text Version 8.1.7

Use the following procedures to troubleshoot problems installing Oracle8i interMedia Text Version 8.1.7.

## 20.15.1 Manually Installing ctxsys Data Dictionary

Data Dictionary Installation interMedia Text is integrated with the Oracle Database Creation Assistant (DBCA) so the ctxsys data dictionary should be installed when using this tool. If the ctxsys data dictionary does not install, use the following procedure to install it manually.

### Prerequisites

- The interMedia Text files are installed.
- The database does not have a ctxsys user.
- The current directory is `?/ctx/admin`.
- You can use SQL\*Plus internally.

### Steps

1. Create the ctxsys user and pass it the ctxsys password, default tablespace, and temporary tablespace as arguments.

```
sqlplus internal @dr0csys <password> <def_tblspc> <tmp_tblspc>
```

2. Install the data dictionary:

```
sqlplus ctxsys/<password> @dr0inst <ctxx_library>
```

The argument is the full path to the ctxx library, for instance:

```
sqlplus ctxsys/<password> @dr0inst $ORACLE_HOME/ctx/lib/libctxx8.so
```

3. Install appropriate language-specific default preferences. There are more than forty scripts in `?/ctx/admin/defaults` that create language-specific default preferences. They are named in the form `drdefXX.sql`, where XX is the language code (from the Server Reference Manual).

For instance, to install the US defaults:

```
sqlplus ctxsys/<password> @defaults/drdefus.sql
```

interMedia Text should now be installed and working.

## 20.15.2 Post-Installation Setup

If this database was an existing ConText site, make sure to remove `text_enable` from the `init.ora`. It is no longer used in Oracle8i, and will actually prevent Oracle8i from

operating properly. You will get errors such as “Cannot find package DR\_REWRITE.”

Ensure that the Net8 listener is running and is configured to invoke external procedures. A brief description of the process is below, and complete details are in *Oracle8i Server Administrator's Guide*.

## Steps

1. Add an entry to the tnsnames.ora:

```
extproc_connection_data =
 (DESCRIPTION =
 (ADDRESS = (PROTOCOL = ipc)
 (KEY = DBSID))
 (CONNECT_DATA = (SID = ep_agt1)))
```

DBSID is the database SID. ep\_agt1 can be named anything.

extproc\_connection\_data should not be changed.

2. Add the following to the listener SID\_LIST:

```
SID_DESC = (SID_NAME = ep_agt1)
 (ORACLE_HOME = /oracle)
 (ENVS = LD_LIBRARY_PATH=/oracle/ctx/lib)
 (PROGRAM = extproc))
```

ep\_agt1 matches the CONNECT\_DATA SID for extproc\_connection\_data in the tnsnames.ora. The PROGRAM section tells the Net8 listener to start the external procedure process. The ENVS section, which is shown here for UNIX, will ensure that the environment includes ?/ctx/lib in LD\_LIBRARY\_PATH. This is needed so that indexing can use the INSO filters.

3. Since the extproc\_connection\_data ADDRESS section specifies ipc, make sure that the ADDRESS\_LIST of listener.ora accepts ipc connections.

A quick way to test the Net8 configuration is to do:

```
exec ctx_output.start_log('log')
```

from SQL\*Plus. If the setup was not performed correctly, you get the error,

DRG-50704: Net8 listener is not running or cannot start external procedures.

To troubleshoot this error, check the following possible causes:

- listener is not running.

- listener.ora is not configured for extproc.
- tnsnames.ora is not configured for extproc.
- listener does not accept ipc connections.

---

# Integrating Oracle iStore with Oracle Advanced Supply Chain Planning

This chapter describes the integration of Oracle iStore 11i with Oracle Advanced Supply Chain Planning.

Main topics in this chapter include:

- [Section 21.1, "Overview of Oracle Advanced Supply Chain Planning"](#)
- [Section 21.2, "Setting up Oracle Advanced Supply Chain Planning"](#)

More information on ATP and Oracle iStore can be found in the white paper, *Multi-Org ATP and Fulfillment with iStore 11i*.

## 21.1 Overview of Oracle Advanced Supply Chain Planning

Oracle Advanced Supply Chain Planning is a comprehensive, Internet-based planning solution that decides when and where supplies such as inventory, purchase orders, and work orders should be deployed within an extended supply chain. It performs the supply planning function.

## 21.2 Setting up Oracle Advanced Supply Chain Planning

Set up Oracle Advanced Supply Chain Planning for Global ATP if you want to provide global inventory availability information to your customers. As part of the rules for determining availability, you can provide sourcing rules that encompass orders already placed, open purchase orders, and other availability factors.

For more details, refer to *Oracle Advanced Planning and Scheduling Implementation and User's Guide*, *Oracle Inventory User's Guide*, and *Oracle Order Management User's Guide*.

You must also set up Oracle Material Requirements Planning. See *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide* for more information.

### **21.2.1 Setting up Global Available to Promise (ATP)**

Oracle iStore can provide regular available to promise (ATP) information on inventory items without customization. For more information, see [Section 7.4, "Providing Regular Available to Promise \(ATP\)"](#).

If you want to enable global ATP for Oracle iStore, you must install Oracle Advanced Supply Chain Planning and Oracle Material Requirements Planning.

---

# Integrating Oracle iStore with Oracle Bills of Material

This chapter describes the integration of Oracle iStore 11*i* with Oracle Bills of Material.

Main topics in this chapter include:

- [Section 22.1, "Overview of Oracle Bills of Material"](#)
- [Section 22.2, "Oracle iStore Functionality with Oracle Bills of Material"](#)
- [Section 22.3, "Implementing Oracle Bills of Material"](#)

## 22.1 Overview of Oracle Bills of Material

Oracle Manufacturing and Oracle Order Management use Oracle Bills of Material (BOM) to store lists of items (products) associated with a parent item and information about each item's relationship with its parent.

Oracle Bills of Material supports the following types of bills of material:

- Standard
- Models
- Option class
- Planning

## 22.2 Oracle iStore Functionality with Oracle Bills of Material

You can use Oracle Bills of Material to set up configurable models, model bundles, and items with standard warranties for sale in your sites. This chapter addresses only the setup of **model bundles** in Oracle iStore using Oracle Bills of Material.

For information about creating bills of material for other types of products, see *Oracle Bills of Material User's Guide* and *Oracle Inventory User's Guide*. For more information on setting up configurable items, see [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#).

### 22.2.1 Overview of Model Bundles

The Oracle iStore product catalog supports model bundles. A model bundle is a pre-configured model item in which all components (option classes) are mandatory.

A model bundle exists in Oracle Inventory and Oracle Bills of Material as follows:

- In Oracle Inventory, one model item is the top item in the model bundle. Option classes represent every other item in the model bundle.
- In Oracle Bills of Material, the model item's bill lists every option class as a mandatory component. Each option class's bill lists only one item as an option.

From the customer perspective, the model bundle consists of the Oracle Inventory model item and the items listed on the option class bills in Oracle Bills of Material.

Use a model bundle only when revenue recognition at the component item level is required. Otherwise, use a standard item for better performance.

### 22.2.2 Model Bundle Display in the Catalog

The catalog display of model bundles is similar to standard item display.

Model bundle products are displayed in the catalog as follows:

- The catalog display price is the sum of the prices for the model bundle's model item and other components, including option classes and items.
- In section pages, a model bundle is listed with the descriptions of its model item. The model bundle's other components are not listed.
- In a section page with single item selection, an Add to Cart button appears next to a model bundle.
- In a section page with multiple item selection (which normally appears with items listed in a pull-down menu), an Add to Cart button appears next to a



model bundle. Customers cannot include a model bundle when selecting multiple items for addition to their carts.

- Model bundles do not appear in the menus unless Express Checkout is turned off.
- The item detail page displays descriptions of the model bundle's model item and lists the model bundle's components.
- Express Checkout is not available for model bundles.

### 22.2.3 Model Bundle Display in the Shopping Cart

The shopping cart display of model bundles is similar to standard item display.

Model bundle products are displayed in the shopping cart as follows:

- A model bundle appears as one line in the shopping cart.
- A **Bundle Details** link appears in the shopping cart line. Clicking it displays a list of the model bundle's items.
- If a customer wants to use a commitment for the model bundle at checkout, he or she can only apply an open commitment. See [Section 10.5.2, "Commitments"](#), for more information on commitments.

### 22.2.4 Model Bundle Pricing

A model bundle's price is the sum of the prices for the model item and other component items.

You can set up pricing for a model bundle component in one of the following ways:

- The component's price varies depending on whether the component is purchased separately or as part of a model bundle.
- The component's price is always the same.

Use the pricing attribute Model Id to allow variable component pricing depending on whether it is purchased separately or as part of a particular model. When the component is purchased separately, no pricing attribute is passed to Oracle Pricing. When the component is purchased as part of a model, the model ID is passed to Oracle Pricing as the pricing attribute Model Id.

Model bundle pricing is available only for the model item's primary unit of measure (UOM).

### **Example 22–1 Pricing Model Bundle Components**

The item Java Book has the following pricing:

- \$20 when purchased separately
- \$5 when purchased as part of a Java course

To establish this pricing, the price list must have two lines for the item Java Book:

- Java Book \$20
- Java Book \$5, Model Id = Java course's model ID

## **22.3 Implementing Oracle Bills of Material**

Use the following procedure to create a model bundle. See [Section 2.9, "Setting up Oracle Inventory"](#) for more details about creating site products.

### **Prerequisites**

- Set up the Oracle Configurator servlet as described in [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#) and *Oracle Configurator Installation Guide*. Oracle iStore uses the Oracle Configurator servlet to retrieve model bundle information. You do not need to create Configurator UIs for model bundles.
- Set the profile option **BOM: Configurator URL of UI Manager** to Oracle Configurator Servlet URL. Set the profile option at site, application, and IBE\_CUSTOMER responsibility levels. Remember, if you are implementing multiple organizations, you will have more than one customer responsibility. Be sure to set the profile option for all customer responsibilities for all organizations. See [Section A.15, "Oracle Configurator/Bills of Material Integration Profile Options"](#), for details.

### **Steps**

1. Log in to Oracle Forms with Inventory responsibility. In Oracle Inventory, create the model bundle's model item with the following settings:
  - In the Bills of Material tab:
    - BOM Allowed = **Yes** (checked)
    - BOM Item Type = **Model**
  - In the Work In Process tab:

- Build In WIP = **No** (unchecked)
- Supply Type = **Push**
- In the Order Management tab:
  - Pick Components = **Yes** (checked)

---

**Note:** Remember that pricing for a model bundle is available only for the model item's primary UOM.

---

2. In Oracle Inventory, create the model bundle's option classes with the following settings:
  - In the Bills of Material tab:
    - BOM Allowed = **Yes** (checked)
    - BOM Item Type = **Option Class**
  - In the Work In Process tab:
    - Build In WIP = **No** (unchecked)
    - Supply Type = **Phantom**
  - In the Order Management tab:
    - Pick Components = **Yes** (checked)
3. In Oracle Inventory, create the model bundle's non-model items with the following settings:
  - BOM Allowed = **Yes** (checked)
  - BOM Item Type = **Standard**

These items will be included in the option classes' bills in Oracle Bills of Material.

4. In Oracle Bills of Material, create a bill for each option class in the model bundle. Each option class bill should have only one item.

---

**Note:** To ensure that prices are displayed and calculated for the model bundle's items, make the items in the option class bills **optional**. Oracle Order Management does not price items in a model bundle if they are mandatory.

---

5. In Oracle Bills of Material, create a bill for the model bundle's model item. Include the model bundle's option classes in the bill as mandatory components.
6. When you create a bill, it exists only in the current organization. If you are implementing multiple organizations, copy the bill to your other organizations, or reference the bill as a *common* bill. See *Oracle Bills of Material User's Guide* for additional details.
7. In Oracle Pricing, set up pricing for the model bundle's items. If you want an item to have different prices depending on whether it is included in a model bundle, use the pricing attribute Model Id as described in [Section 22.2.4, "Model Bundle Pricing"](#).
  - The model bundle's model item should have a price of zero, without any modifiers.
  - The model bundle's option classes should have prices of zero, without any modifiers.
  - The items in the option classes' bills should be set up with prices and any applicable modifiers.
8. If you have set up a pricing attribute for an item, you must run the Build Sourcing Rules concurrent program to generate and display the correct prices. Follow the directions in *Oracle Pricing User's Guide*. Restart the Apache server after the concurrent program completes.

See also:

- *Oracle Bills of Material User's Guide*
- *Oracle Inventory User's Guide*
- *Oracle Pricing User's Guide*

---

# Integrating Oracle iStore with Oracle Configurator

This chapter describes the integration of Oracle iStore 11i with Oracle Configurator.

Main topics in this chapter include:

- [Section 23.1, "Overview of Oracle Configurator"](#)
- [Section 23.2, "Creating Configurable Product Models"](#)
- [Section 23.3, "Oracle iStore Functionality with Oracle Configurator"](#)
- [Section 23.4, "Setting up Oracle Configurator"](#)
- [Section 23.5, "Testing the Oracle Configurator Setup"](#)
- [Section 23.6, "Troubleshooting Oracle Configurator Integration"](#)

## 23.1 Overview of Oracle Configurator

Oracle Configurator allows user configuration of complex items. It also provides guided selling, where the user is offered a list of choices or sequential questions to create a hierarchical list of items to view and purchase. Oracle Configurator is used to create product models and to help the buyer assemble related and dependent products in the shopping cart.

## 23.2 Creating Configurable Product Models

You can use the Configurator Developer UI to create the product models for dependent and related products, and to build rules around the products.

To be configurable in Oracle iStore, a product model must have the following characteristics:

- The model and its associated option classes and standard items are defined in the Master Inventory Organization and assigned to the shipping organization.
- The model has a BOM item type of "Model" in Oracle Inventory, and its associated options have a BOM item type of "Option Class."
- The model and its associated options are published and orderable on the web.
- The model and its associated option classes have a BOM structure defined in Oracle Bills of Material.
- The model and its components have been added to a price list. You can set the price of the option classes to zero if necessary, but they must be assigned to a price list.
- You have transferred the model and its components to the Oracle Configurator schema by running the Populate Configuration Models concurrent program from Oracle Manufacturing. (Choose Flow Manufacturing > Setup > Other > Configurator > Populate Configuration Models.)
- If you changed the model and its components in Oracle Order Management after you populated it into the Oracle Configurator schema, then you must run the Refresh Configuration Models concurrent program from Oracle Manufacturing. (Choose Flow Manufacturing > Setup > Other > Configurator > Refresh Configuration Models.)

The product models are imported initially from BOM models. You can use the Configurator Developer UI to create a tree structure for the product model. For example, if customers want to build their own laptops from a site of electronic items, then you can use the Configurator Developer UI to define the structure and the dependent (mandatory and optional) products (e.g., a 15" or 17" screen with 16MB or 32MB RAM and 6GB or 8GB drive).

## 23.3 Oracle iStore Functionality with Oracle Configurator

Oracle iStore allows users to configure items by retrieving the Configurator module through the Customer UI. This functionality is discussed in this section; topics include:

- [Section 23.3.1, "Customer UI Configurator Business Flow"](#)
- [Section 23.3.2, "Retrieving the Configurator UI"](#)
- [Section 23.3.3, "Changing the Oracle Configurator UI"](#)
- [Section 23.3.4, "Using Solution-Based Modeling"](#)

- [Section 23.3.5, "Configurator Usage Support"](#)

### 23.3.1 Customer UI Configurator Business Flow

The following is the business flow for configuring items in the Customer UI.

1. When the customer is browsing items in an Oracle iStore site, a Configure button appears next to each configurable item. Configurable items have a BOM item type of "Model" in Oracle Inventory, and are associated with a Configurator UI. In the shopping cart, a *Reconfigure* link appears underneath the top item in a configured item.

Note that configured items are not merged in the shopping cart, regardless of the setting of IBE: Merge Shopping Cart Lines.

2. When the user selects Configure, the site sends a message to populate the Configurator UI with the item ID. The Configurator UI appears in the frame provided in an Oracle iStore page. Here, the related or dependent products can be assembled for placing the order.
3. Once the customer has finished building the list of selected items for the order, selecting Done in the Configurator UI's top menu bar places all the items in the shopping cart.
4. In the shopping cart, the user can update the quantity for the top level item.

**Note:** Launching Oracle Configurator from Oracle iStore is not supported if users are connected to your sites through Secure Socket Layer (SSL) network connections.

See *Oracle Configurator Developer User's Guide* for detailed setup documentation.

### 23.3.2 Retrieving the Configurator UI

Oracle iStore gets the Configurator UI via the Oracle Configurator Servlet URL, which handles all interaction between the client and the server. The URL is the location where the Oracle Configurator servlet resides. The installer of the servlet sets up this URL. For example, the URL could be

```
http://apps-server-host:8800/oa_servlets/oracle.apps.cz.servlet.UiServlet
```

The server and directory structure are installation-specific information that the calling application must read, but the `oracle.apps.cz.servlet.UiServlet` portion is always the same. Oracle iStore reads this URL from the profile option BOM: Configurator URL of UI Manager. Set this profile option to the correct URL. You must also set the profile option ASO: Configurator URL to the same URL.

### 23.3.3 Changing the Oracle Configurator UI

The Configurator UI is created with DHTML or a Java applet. The look and feel are similar to the Oracle iStore UI. If you want to change the Configurator UI, you can modify the HTML templates for Oracle Configurator. These templates are loaded in Oracle iStore's `html` directory on the same server by default. The Oracle Configurator data is stored in the CZ tables in the APPS schema.

If you change the UI for a model in Oracle Configurator Developer, you must restart the Apache server and clear the cache before the new UI is available in Oracle iStore.

### 23.3.4 Using Solution-Based Modeling

Oracle Configurator Developer allows users to create configuration models using Oracle Inventory items and pre-existing ATO/PTO models, and to allow runtime users to order such models through Oracle iStore -- this is the goal of Solution-Based Modeling.

With Developer-created models, configuration users can create multiple instances of a configurable model component, with each model component configured differently -- this is known as *multiple instantiation*. In Oracle iStore, multiple instantiation enables Customer UI users to add components during their user session, adding and configuring as many separate components as needed. Oracle iStore displays and prices each sub-model according to its individually selected options.

Note that this does **not** require integration with Oracle Advanced Pricing.

To allow Oracle iStore (and Oracle Quoting) to distinguish between multiple instances of a component, the field `aso_quote_line_details.config_item_id` is used. When cart (quote) lines are added to a cart (quote) from a saved configuration, this field is populated with the `config_item_id` from `aso_i_config_details_v.config_item_id`.

Oracle iStore prices a configuration together with the rest of the cart lines. When pricing the restored/reconfigured configuration, the current option selections are matched with the previously saved cart lines. To accomplish the re-pricing, Oracle iStore uses the Oracle Configurator columns --- **`config_item_id`** and **`parent_config_item_id`** --- in the **`cz_pricing_structures`** table. These columns contain unique, temporary values for the newly selected items. The `config_item_id` column has appropriate values for the items existing in the saved configuration. The `config_item_id` column corresponds to the `configuration_id` column in Oracle Order Management.



Note that solution based modeling is not supported with Oracle iStore shopping list functionality.

For more information, see the *Oracle Configurator Implementation Guide* and the *Oracle Configurator User Guide*.

## 23.3.5 Configurator Usage Support

Companies may wish to distinguish between novice and expert users and then provide an Oracle Configurator UI based on their usage level. For example, Oracle Configurator can be set up so that novice users might only see high level, guided selling questions, while expert users would have access to an alternative UI with detailed options. This ability to distinguish between flows can also impact the model structure, the rules in a configuration session and the specialty site.

In order to support the Oracle Configurator usage functionality, Oracle iStore provides a hook in the API Java layer that allows merchants to supply custom code. The custom code can get the necessary parameters from the cookie and return the usage. If null is returned by the custom code, Oracle iStore does not pass the `config_effective_usage` parameter in the initialization string -- otherwise, it passes the value returned by the custom code.

If no parameter is passed for usage in the initialization message (`config_effective_usage`), Oracle Configurator looks at the profile option, `CZ: Publication Usage`, for the usage value. If the profile has not been set, then Configurator uses the default usage, which is Any Usage.

### 23.3.5.1 Implementing the Usage Hook

A Java abstract class, public abstract class `ConfiguratorHook`, also is provided to act as an interface for a customer to implement the hook. This class contains one method, public abstract `String getUsageParameter (String inventoryItemId, HashMap hashedParameters)`, which throws `ConfiguratorException`, `FrameworkException`, `SQLException`.

1. Create a Java file in your implementation of this abstract class, and name it `CustomConfigHook.java`. You can find an example in [Section 23.3.5.2, "Example of CustomConfigHook Java File"](#).
2. Add code and logic to implement the `getUsageParameter` API to return the usage parameter values used in the Configurator Developer tool to distinguish which UI to use.
3. Place the class file in the `oracle.apps.ibe.configurator` package.

4. Bounce the middle-tier server.

### 23.3.5.2 Example of CustomConfigHook Java File

Below is an example of a customized class file implementers might create and compile to pass a usage parameter. Implementers can create their own versions of the CustomConfigHook.java file to return strings created in the Configurator Design tool based on the values which will be the determining factors for retrieving the specified UI (for example, Site ID, whether the user has certain permission or not, values in the cookie, values in the input hash table passed in from customizations in the ibeCFgdFrameSources.jsp page, etc.).

This example file returns the string, Simple UI, if the user is in Site ID 1000; otherwise it returns, Advanced UI.

```
package oracle.apps.ibe.configurator;

import oracle.apps.jtf.base.resources.FrameworkException;
import com.sun.java.util.collections.HashMap;
import java.sql.*;
import oracle.apps.ibe.util.RequestCtx;
import java.math.BigDecimal;

public class CustomConfigHook extends ConfiguratorHook {

 /**
 * Abstract method which defines the parameters for retrieving a configurator
 * usage parameter
 *
 * @param inventoryItemId:String, hashedParameters:HashMap (to pass in any
 * other parameters an implementation may need)
 * @return String (value to be passed in the Configurator's xml initialize
 * message as the "config_effective_usage" parameter)
 * @throws FrameworkException - if there is a framework layer error
 * @throws SQLException - if there is a database error
 * @throws ConfiguratorException - for throwing application specific errors
 */
 public String getUsageParameter(String inventoryItemId, HashMap
 hashedParameters)
 throws ConfiguratorException, FrameworkException, SQLException
 {
 if (RequestCtx.getMinisiteId() == new BigDecimal("1000"))
 return "Simple UI";
 else

```

```

 return "Advanced UI";
 }
}

```

## 23.4 Setting up Oracle Configurator

Use the following procedure to set up Oracle iStore with Oracle Configurator.

### Prerequisites

- Rapid Install is complete.
- The file `env.txt`, located in the `$COMMON_TOP/html` directory, defines the directory that the variable `$FND_TOP` represents. The content of the file should be similar to the following example:

```
FND_TOP=/<root path>/<database or environment name>/fnd/11.5.0
```

- You have set up and tested the Oracle Configurator servlet.
- You have built Configurator UIs for the configurable items that you plan to sell.

### Steps

1. In Oracle Inventory, make sure that every item that can be shown for a configured item, from the root model item to every option class and every leaf node, is set with the required product flags in the Master Item form. See [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#).
2. In Oracle Pricing, make sure that every item that can be shown for a configured item is added to the price list that will be used by the site and customer, even if it has a zero price. See [Chapter 10, "Implementing Pricing"](#).
3. Log in to Oracle Forms with the System Administrator responsibility and set the profile option, BOM: Configurator URL of UI Manager, at (a) site, (b) iStore application, and (c) IBE\_CUSTOMER responsibility level to the Oracle Configurator Servlet URL:

```
http://<host>:<port>/<servlet zone>/oracle.apps.cz.servlet.UiServlet
```

The values for the host, port, and servlet zone are determined by your Apache server configuration.

- See [Section A.15, "Oracle Configurator/Bills of Material Integration Profile Options"](#), for more information about this profile option.

4. Set the profile option, ASO: Configurator URL, to the same value as BOM: Configurator URL of UI Manager.
  - See [Section A.15, "Oracle Configurator/Bills of Material Integration Profile Options"](#), for more information about this profile option.
5. Set the profile option, OM: Use Configurator, to Yes at the site level. This profile option is necessary for successful order placement.
6. Edit the database instance's Database Configuration (.dbc) file. The .dbc file enables connection to the database and is installed in the \$FND\_TOP/secure/ directory. The following edits are required in addition to any configuration settings that are required by other Oracle applications:
  - Only Oracle thin drivers are supported, so uncomment: APPS\_JDBC\_DRIVER\_TYPE=THIN
  - Add the following line and replace the item between brackets with the appropriate value: BATCH\_VALIDATE\_USER= [Applications Username of the Guest]
  - Add the following line and replace the item between brackets with the appropriate value: BATCH\_VALIDATE\_PWD= [Applications Password of the Guest]
  - Uncomment the following line and replace "host\_name" with the appropriate value: DB\_HOST=host\_name
  - Uncomment the following line and replace "port\_number" with the appropriate value: DB\_PORT=port\_number
  - Uncomment the following line and replace "database\_name" with the appropriate value: DB\_NAME=database\_name
7. The jserv.properties file must have the template URL defined as follows (these URLs must be able to be resolved when entered into a browser):
 

```
wrapper.bin.parameters=-Dcz.uiservlet.templateurl=http://<host>:<port>/OA_
HTML/US/czFraNS.htm
wrapper.bin.parameters=-Dcz.uiservlet.templateurl.ie=http://<host>:<port>/OA_
HTML/US/czFraIE.htm
```
8. In the Oracle iStore Site Administration UI, add the model item to some part of the catalog to be displayed.

9. In a load balanced environment, set the profile options, IBE: iStore Non Secure URL and IBE: iStore Secure URL to the load balancer URL (the www.oracle.com one).

## 23.5 Testing the Oracle Configurator Setup

Use the following procedure to test the Oracle Configurator setup.

### Prerequisites

You have enabled cookies for both the browser and the middle tier. Oracle Configurator requires cookies.

### Steps

1. Test that the Oracle Configurator middle tier servlet is running and getting the Oracle Configurator version, by entering the following URL in the browser:

```
http://<host>:<port>/<servlet zone>/oracle.apps.cz.servlet.UiServlet?
test=version
```

The browser should return a message similar to the following statement:

```
Using configuration software build: 11.5.1.14.27 Expecting schema: 14c
```

2. Create the Configurator Standalone Test Page by writing the following lines into an HTML file with an .htm file name extension.

```
<!--=====
| Copyright (c)2000 Oracle, Redwood Shores, CA
| All rights reserved.
+=====
|
| FILE
| Configurator Standalone Test Page
|
| DESCRIPTION
| This page posts an initialize message to the Configurator Servlet
| in order to provide an test of the middle tier, isolated from the
| rest of iStore.
|
| To use this page, read the comments below and replace the values in []
| with values specific to your implementation. Remove the []'s too.
| Remember to edit the form action near the bottom of the page.
| Then open the page in a browser and click the Launch DHTML button.
```

```

|
+=====-->
<HTML>
<HEAD>
<TITLE>Configurator Standalone Test Page</TITLE>
<SCRIPT LANGUAGE=javascript>
<!--
 //globals
 var ns4 = (document.layers)? true : false;
 var ie4 = (document.all)? true : false;

 function submitXML1 () {
 var xmlValue = '';
 xmlValue += '<initialize>';
//Replace the file name with the implemented dbc filename:
 xmlValue += '<param name="database_id">[dbcfilename.dbc]</param>';
//Replace the value with the inventory info of the configurable model item:
 xmlValue += '<param name="model_id">[1234]</param> ';
 xmlValue += '<param name="model_uom">[Ea]</param> ';
 xmlValue += '<param name="model_quantity">1</param> ';
//Try to use an icx session ticket retrieved from a logged init message
 xmlValue += '<param name="icx_session_ticket">CB3E55CF36C0AECD
 </param> ';
//This responsibility ID is currently irrelevant
 xmlValue += '<param name="responsibility_id">22372</param> ';
//Enter the appropriate application ID (usually, it will be 671 for iStore)
 xmlValue += '<param name="calling_application_id">[671]</param> ';
//Enter the organization ID for the configurable item:
 xmlValue += '<param name="context_org_id">[123]</param> ';
//Use any date earlier than the current sysdate
 xmlValue += '<param name="config_creation_date">[06-1-2000]
 </param> ';
//Do not change the UI type for this test:
 xmlValue += '<param name="ui_type">DHTML</param>';
//If the jserv properties are not correctly defined, the template URL can be
//defined here:
// xmlValue += '<param name="template_url">
// http://[machine]:[port]/OA_HTML/US/czIFrame.htm</param>';

//Alternate way of connecting to the database if the dbc file is not working
//(replaces database_id)
// xmlValue += '<param name="alt_database_name">
// jdbc:oracle:thin:@[machine]:[port]:[sid]</param>';
// xmlValue += '<param name="user">[login]</param>';
// xmlValue += '<param name="pwd">[password]</param>';

```

```

// xmlValue += '<param name="gwyuid">[login]/[password]</param>';
//Alternate way of specifying which DHTML UI to launch (replaces model_id
//and context_ord_id)
// xmlValue += '<param name="ui_def_id">[1234]</param>';

 xmlValue += '</initialize>';
 submitXML (xmlValue);
 }

 function submitXML (xml) {
 if (ns4) {
 document.form1.XMLmsg.value = xml;
 document.form1.submit ();
 } else if (ie4) {
 form1.XMLmsg.value = xml;
 form1.submit();
 }
 }
 }
//-->
</SCRIPT>
</HEAD>
<BODY>
<FORM
action="http://[machine]:[port]/servlets/oracle.apps.cz.servlet.UiServlet"
method=POST
id=form1 name=form1>
<input type="hidden" name="XMLmsg" value=''>
</FORM>

<FORM action="" method=POST id=form2 name=form2>
<INPUT type="button" value="Launch DHTML" id=button1 name=button1
onclick="javascript:submitXML1();">
</FORM>
</BODY>
</HTML>

```

3. Edit the fields in the Configurator Standalone Test Page as explained in the comment lines.
4. Open the Configurator Standalone Test Page in a browser.
5. In the Configurator Standalone Test Page, select **Launch DHTML**.  
The UI should appear.

## 23.6 Troubleshooting Oracle Configurator Integration

This section lists checkpoints and fixes that you can use to resolve common Oracle Configurator integration errors. You can also use the Oracle Configurator initialize and terminate messages in the Oracle iStore Java log file as diagnostic tools.

### 23.6.1 The Initialize and Terminate Messages

The Oracle iStore Java log file displays the XML messages that launch and close Oracle Configurator. Search for the words "initialize\_string" and "terminate message" to find the XML strings that are used to launch and return from Oracle Configurator, respectively. See [Section 23.6.2, "Common Oracle Configurator Integration Errors"](#) for instructions on reviewing these messages for possible errors.

#### The Initialize Message

The initialize message should be similar to the following example:

```
<initialize xmlns:cfg="http://appserverhost/apps/cz/cz-javaClient.dtd">
<param name="database_id">ap123sun_dbc</param>
<param name="icx_session_ticket">26A50EB218A8C8D6</param>
<param name="ui_type">DHTML</param>
<param name="context_org_id">204</param>
<param name="model_id">137</param>
<param name="model_quantity">1</param>
<param name="model_uom">Ea</param>
<param name="config_creation_date">07-30-2001-11-14-39</param>
<param name="calling_application_id">671</param>
<param name="responsibility_id">22372</param>
<param name="ibe_back_fail">ibeCScdViewA.jsp</param>
<param name="ibe_back_success">ibeCScdViewA.jsp</param>
<param name="return_url">http://ap123sun:12345/html/ibeCFgpRedirect.jsp
 </param>
<param name="template_url">http://ap123sun:12345/OA_HTML/US/czIFrame.htm
 </param>
<param name="pricing_package_name">aso_cfg_pub</param>
<param name="price_mult_items_proc">Pricing_Callback</param>
<param name="configurator_session_key">6832-1</param>
<param name="ibe_cart_line_id">6832</param>
<param name="ibe_cart_id">2634</param>
</initialize>
```



## The Terminate Message

The terminate message should be similar to the following example:

```
<?xml version="1.0"?>
<terminate>
<config_header_id>3240</config_header_id>
<config_rev_nbr>1</config_rev_nbr>
<valid_configuration>true</valid_configuration>
<complete_configuration>true</complete_configuration>
<exit>save</exit>
<total_price>782.00</total_price>
<prices_calculated_flag>true</prices_calculated_flag>
<config_outputs>
---- a series of options like the one following ----
<option>
<ps_node_id>2085</ps_node_id>
<selection_line_id>9664</selection_line_id>
<parent_line_id>9665</parent_line_id>
<quantity>1</quantity>
<list_price>0.00</list_price>
<discounted_price>0.00</discounted_price>
</option>
---- and then the end ----
</config_outputs>
<config_messages></config_messages>
</terminate>
```

## A Terminate Message With an Error

A terminate message for an error looks like the following example:

```
<?xml version="1.0"?>
<terminate>
<exit>error</exit>
<config_messages>
<message>
<message_type>error</message_type>
<message_text>java.lang.NoClassDefFoundError: oracle/apps/cz/logic/Engine
</message_text>
</message>
</config_messages>
</terminate>
```

## 23.6.2 Common Oracle Configurator Integration Errors

This section lists checkpoints and fixes for common Oracle Configurator integration errors.

### Configurable Item Does Not Appear in the Catalog

This error happens when the item is not published to the specialty site correctly.

- Check that you have added the item to a published site section.
- In Oracle Inventory, confirm that the item's Web Status is Published.

### Configure Button Does Not Appear After Generating the Model

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Make sure the model was populated for the Master Inventory Organization. Using the Bills of Material responsibility, run the Populate Configuration Models concurrent program for the model and choose the value of the profile option IBE: Item Validation Organization for the Organization parameter.
- Check that all of the model's option classes and components are on the price list that is defined for the user, and that they have prices.
- In Oracle Inventory, check that the item has the properties Orderable on the Web and Web Status = Published.
- Check that a Configurator UI exists for the model, using the following SQL query:

```
select cz_cf_api.ui_for_item
(<item_id>,<org_id>,sysdate,'DHTML',-1,1234,<appid - iStore is 671>)
from dual;
```

For example, see the following SQL statement:

```
select cz_cf_api.ui_for_item
(137,204,sysdate,'DHTML',-1,1234,671)
from dual;
```

If the SQL query returns a non-null value, the Configurator UI exists.

If the query returns a null value, the cause is one of the following cases:

- No Configurator UI exists for the model. You must use Oracle Configurator Developer to build a Configurator UI.

- A Configurator UI exists for the model, but it is not published for the user's application (usually Oracle iStore). In Oracle Configurator Developer, check that the model is in Complete status and includes Oracle iStore (IBE) as an application, then publish the Configurator UI. If the user's application ID is something other than 671 for Oracle iStore, the model's Configurator UI must be published for that application too. You can check the user's application ID in the cookie and in the initialize message from the Oracle iStore Java log file. Once the Configurator UI is published, you must restart the Apache server and clear the cache to make the Configurator UI available.
- When the Configure button appears for a configurable item after completing these fixes or any other fixes, you should first try to add a standard item to the shopping cart. If you cannot add the standard item, then the issue is with the shopping cart and you will not be able to add a configurable item.

### Clicking the Configure Button Does Not Launch the Configurator UI

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Make sure the value of the profile option BOM: Configurator URL of UI Manager is valid. Remember to check the machine name, domain name, port number, and servlet zone.
- Test that Oracle Configurator itself has been installed correctly and that the servlet is running, as described in [Section 23.5, "Testing the Oracle Configurator Setup"](#).
- Check that the Oracle Configurator HTML pages exist by navigating to:  
`http://<host>:<port>/OA_HTML/US/czIFrame.htm`  
 Your browser should display a row of four buttons, labeled Summary, Availability, Done, and Cancel.
- Verify that the database instance's .dbc file is in the \$FND\_TOP/secure directory.
- Check that the correct \$FND\_TOP directory is specified in the \$COMMON\_TOP/html/env.txt file.
- Check that cookies are turned on for both the browser and the middle tier.

- Check the Oracle iStore Java log file's initialize and terminate messages for Oracle Configurator. Review the log messages to find possible errors, such as references to other environments and missing or incorrect values.
- Check that Oracle Configurator can run independently of Oracle iStore by using the Configurator Standalone Test Page described in [Section 23.5, "Testing the Oracle Configurator Setup"](#). If you have the initialize message from the Oracle iStore Java log file, edit the Configurator Standalone Test Page to include the message's values. When you select **Launch DHTML** in the page, the UI should launch and run, and you should be able to select **Done** and see summary information. If the UI does not launch or you cannot see summary information, there is a middle tier setup issue.

### Clicking the Configure Button Returns IBE\_ORD\_CAUGHT\_ERR

This error occurs when profile options have not been set up correctly.

- Verify that all required profile options have been set up.

### Blank Screen

This error can occur for a variety of reasons. Check the Oracle Configurator UI log files for the errors listed below, and use the fix described for the error. The Oracle Configurator UI log files are named `cz_exc__.log`. They are located in the `$OAH_TOP/util/apache/1.3.9/Apache/logs/` directory or the `$APACHE_TOP/Jserv/logs` directory.

- **Database Connection Error**—The `.dbc` file has not been set up correctly. Set up the `.dbc` file using the guidelines in [Section 23.4, "Setting up Oracle Configurator"](#).
- **Socket Connection Error**—The Apache server is not running. Restart the Apache server.
- **Data/End of Communication Error**—The Apache server is not running. Restart the Apache server.
- **Unsatisfied Link Error**—The `LD_LIBRARY_PATH` and shared library linking are not correct. Correct the `LD_LIBRARY_PATH` and shared library linking.
- **OCI8/Thick Driver Error**—The thin driver is not specified in the `.dbc` file. Edit the `.dbc` file to specify the thin driver.
- **Other Errors**—The profile option that identifies the Configurator URL has an invalid value. Enter the correct URL as the value of the profile options BOM: Configurator URL of UI Manager and ASO: Configurator URL.

### **Clicking Done in the Configurator UI Does Not Return User to Cart Page**

This error can happen for a variety of reasons. Use the following checkpoint to diagnose the error:

- Check the terminate message in the Oracle iStore Java log file to see if Oracle Configurator returned an error. If so, there is an issue with the Oracle Configurator setup.

### **Items in a Configuration Have Null Descriptions in the Cart**

This error happens when the items are not set up correctly in Oracle Inventory.

- In Oracle Inventory, check that the items have the properties Orderable on the Web and Web Status = **Published**.

### **Cannot Create an Order with a Configured Item**

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Verify that carts holding only standard items can be placed as orders. If not, then the issue is not necessarily related to Oracle Configurator.
- In Oracle Order Management, check that for the Standard transaction type, a line flow has been defined for the item's User Item Type. For example, if the User Item Type is ATO Model, then verify that a line flow for the Item Type ATO Model has been defined for the Standard transaction type.

### **Ending a Configurator Session Does Not Return User to Load Balancer URL**

In a load balanced environment, be sure to set the profile options, IBE: iStore Non Secure URL and IBE: iStore Secure URL to the load balancer URL (the www.oracle.com one).



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# Integrating Oracle iStore with Oracle Content Manager

This chapter details Oracle iStore 11i's integration with Oracle Content Manager (OCM) to provide a full range of content creation, collaboration, approvals, versioning, and web publishing functionality.

Main topics in this chapter include:

- [Section 24.1, "Oracle Content Manager Overview"](#)
- [Section 24.2, "Implementing Oracle Content Manager"](#)
- [Section 24.3, "Oracle iStore Functionality with Oracle Content Manager"](#)
- [Section 24.4, "Implementing Oracle iStore-OCM Integration"](#)
- [Section 24.5, "Site Administration Behavior with OCM Integration"](#)
- [Section 24.6, "Usage Summary Pages"](#)
- [Section 24.7, "Concurrent Program to Migrate Data"](#)

## 24.1 Oracle Content Manager Overview

Oracle Content Manager (OCM) is an integrated content management system for Oracle's E-Business Suite. OCM provides content management building blocks and manages unstructured data through create, approval, publish, and release lifecycles. OCM has a central repository that manages folders, versions, and translations, and enables an organization to collaboratively work on content with associated workflows.

See the Oracle Content Manager implementation and user guides for more information.

## 24.1.1 Oracle Content Manager Key Features

Oracle Content Manager (OCM) key features and benefits include:

- **Bulk upload** --- Administrators can upload items in bulk; to help facilitate bulk upload, file extensions can be mapped to content types.
- **Content creation** --- Content items, which can be re-used in other applications, including Oracle iStore, can be created and maintained.
- **Content types** --- Data is organized into *content types*, which are logical sets of attributes and attachments defining the required building blocks of a content item. See [Section 24.1.3, "Oracle Content Manager Content Types"](#), for more details.
- **Seeded content items** --- OCM provides some seeded content items. Seeded content items cannot be modified. An example of a seeded content item is a stylesheet.
- **Content management** --- Existing content items can be updated from the OCM application.
- **Categories** --- Content items are grouped into categories, allowing logical association of similar content items. Content items must be associated to a category in order to appear in the Library.
- **Security** --- Permissions allow different users to possess varying degrees of permissions within the application. (These are separate from Oracle E-Business Suite permissions.) At the folder level, you can specify permissions globally, or specify permissions for specific users, CRM resource groups, or Oracle Applications responsibilities.
- **File attachments** --- Attachments allow separate files to be linked to a content item. Attachments can be any type of files, such as text files, or binary files.
- **Stylesheets** --- A content type, stylesheets tell an application's rendering engine how to display a content item to a calling application. Each content type may have several stylesheets associated to it. Individual stylesheets are stored in the repository like any other content item.
- **Collaboration** --- Users worldwide can collaborate on content which is stored and accessed centrally.
- **Versioning** --- A versioning system allows multiple versions and the ability to return to previous versions.
- **Translations** --- Translation functionality allows users to upload translated content in order to translate content items into multiple languages.



- **Approvals** --- OCM contains seeded approval processes which leverage Oracle Workflow to send e-mail notifications to users, communicating about the status of content items.
- **Folders** --- Access to content also is controlled through the use of folders, also called directories. Users can be awarded access to several folders. Default folders can be assigned at site, application, and responsibility levels, through a profile option setting. A user's workgroup/working folder is the area that the user has access to in order to manipulate content items. Users can only view the directories and sub-directories to which they have been provided access. Users also have the option of setting a single folder as their "Home" folder. Users with specific permissions can create and manage folders.
- **Base language** --- OCM has the concept of a single base language. The base language determines the language that content is created in. Any other languages beyond the base language need to be entered through the translation UI.

To learn more about the Oracle Content Manager application, see the *Oracle Content Manager Implementation Guide* available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 24.1.2 Oracle Content Manager Integration Key Terms and Definitions

The following key terms and definitions relate to content management using Oracle Content Manager and/or Oracle iStore content management functionality:

1. **Content Type** --- A logical set of attributes and attachments related to a content item. See [Section 24.1.3, "Oracle Content Manager Content Types"](#), for more information.
2. **Content Item** --- Data of a certain content type. For example, if a "feature article" is a content type, then the specific article entitled, "Selecting the Right DB for your Company", is the content item.
3. **Attribute** --- A piece of data that makes up a Content Type. An Attribute is of data type text, date, number, etc. For example: "Title" is an attribute of the content type, "Feature article". An Attribute can have the following data formats: text, date, number, boolean, HTML, and URL, based on the OCM UI.
4. **Live Version** --- The Live Version is the version that is linked to a media object in the Site Administration UI. Oracle iStore does not check whether the section or product that includes the media object is Published or Unpublished.

5. **Media Object** --- Media objects are logical content holders for displaying media files, such as images and HTML content. Each media object maps to a physical (electronic) content item/file to present content in the Oracle iStore Customer UI.

Without OCM integration, Oracle iStore media object functionality allows you to control the files/content items that you want to display in a specific site and for a specific language. With OCM integration, no mapping is made at the language level, but rather, you select the content item in the language desired (after it has been translated). See [Section 9.3, "Understanding Media Objects"](#), for more information on Oracle iStore's media objects functionality. See the *Oracle Content Manager User Guide* for more information on translating content and selecting translated files.

6. **Content Component** --- Formerly called multimedia components, content components are placeholders for types of content that can be used in the catalog pages for sections and products. See [Section 9.2, "Understanding Content Components"](#), for more information.
7. **Class** --- Media objects and content components are organized by their purpose, which is designated by their Class. The class concept replaces the previous Applicable To designation used to classify media objects and content components. See [Section 9.1.2, "Media Objects and Content Components Classes"](#), for more information.
8. **iStore Object** --- An iStore object is a section, product, or media object associated to a content item.

### 24.1.3 Oracle Content Manager Content Types

In OCM, content types are logical sets of attributes and attachments which define the required building blocks of a content item. Content types ensure content consistency and capture meta data. (Meta data describes how and when and by whom a particular set of data was collected, and how the data is formatted.) Content types are not file types. Examples of content types may include: images, white papers, sales presentations, feature articles, and stylesheets.

Some content types are seeded in the application. The seeded types cannot be altered, but you can copy a content type and modify the duplicate. You also can create new content types.

### 24.1.3.1 Grouping Content Types

Content types can be grouped, and users can be given access to a specific content type group by setting the profile option, IBC: Content Type Group. See the *Oracle Content Manager Implementation Guide* for more information.

## 24.2 Implementing Oracle Content Manager

Set up Oracle Content Manager according to the *Oracle Content Manager Implementation Guide*, available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 24.3 Oracle iStore Functionality with Oracle Content Manager

Oracle iStore users can integrate with Oracle Content Manager (OCM) to leverage OCM's ability to create, version, approve, and manage content items within the Oracle iStore Site Administration UI. This content then can be used with existing Oracle iStore media objects and content components functionality to present the content in the Oracle iStore Customer UI.

**Important:** Following the integration, the Site Administration UI and related content functionality will change. See [Section 24.4, "Implementing Oracle iStore-OCM Integration"](#), for details.

Integration with OCM provides the following benefits:

- A clear division of tasks among content creators, content translators, content approvers, and the site administrator
- Site administrators can preview content items before publishing them to a site
- Content versioning and the ability to quickly present a Live version in the sites
- Approval processes to ensure consistency and control of data

Depending upon the permissions awarded, the site administrator can be both a content creator and approver. Users with iStore administrator responsibility can be granted all of the privileges supported by Oracle Content Manager to create and approve content items.

**Note:** The profile option, IBC: Use Access Control, controls whether user permissions are checked in the OCM pages. See [Section 24.4.3, "Step 3 - Set Profile Options"](#), and [Section 24.4.5, "Step 5 - Grant OCM Privileges to Site Administrator"](#), for more details.

## 24.3.1 Architecture and Integration Points in Oracle iStore-OCM Integration

This section contains information on the architecture and integration points of the integration between Oracle iStore and Oracle Content Manager.

### 24.3.1.1 Architectural Overview

The following components are involved in content management with OCM integration:

- **Oracle Content Manager** --- Allows users to create and update content, translate content, submit content for approval, and approve content.
- **Site Administration UI** --- Oracle iStore's administration UI allows site administrators to select content and associate it with media objects and content components, preview content, and publish content.
- **Oracle iStore Customer UI** --- Display content items in the specialty sites.

### 24.3.1.2 Integration Points

All content item information -- other than content item association to iStore objects (e.g., products, sections, and media objects) -- is stored in the Oracle Content Manager schema.

Oracle iStore-Oracle Content Manager integration points are as follows:

1. **Oracle APIs** --- An API layer allows a variety of Java and SQL communications between Oracle iStore, Oracle Content Manager, and the database.

For information on the public APIs, see the *Oracle iStore API Reference Guide* and the Oracle Content Manager API documentation.

- **Retrieve and Update Content** --- Site Administration UI and Oracle Content Manager APIs allow Oracle iStore to get the latest content from OCM data tables, and to communicate updates to that content.
  - **Retrieve Published Content** --- Oracle iStore Customer UI public APIs call OCM APIs to get the correct version of content items and display them in the specialty sites. Only content items which are published through the Site Administration UI will display in the Oracle iStore Customer UI.
2. **Content Storage, Searching, and Retrieval** --- Any number of content items can be stored in the OCM schema. Content items within the OCM working folder are available to the site administrator in the Site Administration UI. Site administrators can view summaries of content used in the sites, search for content items, approve content, translate content, and delete content. These

abilities depend upon the OCM permissions awarded the administrator and the OCM setup, including the value of the profile option, IBC: Use Access Control.

3. **Content Association to iStore Objects** ---The association of content items and media objects is stored in the Oracle iStore schema. The site administrator can create and update associations only from iStore's Site Administration UI. The administrator will be able to select all Approved content items.
4. **Content Management** --- The OCM schema stores the content item version published in the Oracle iStore Customer UI. OCM's integration with Oracle Workflow allows e-mail notification of content approval processes.

### 24.3.2 Business Flows for Oracle iStore-OCM Integration

The following is the high-level business process flow for content management in Oracle iStore, when integrated with OCM.

1. **Content item is created.**

With the required permissions, the site administrator can create content items in the Site Administration UI. If he does not, the content creator creates content items in OCM.

2. **Content item is submitted for approval.**

In the Site Administration UI, the **Submit** button in the **Create Content: Content Detail** page submits the content item into the approval stage.

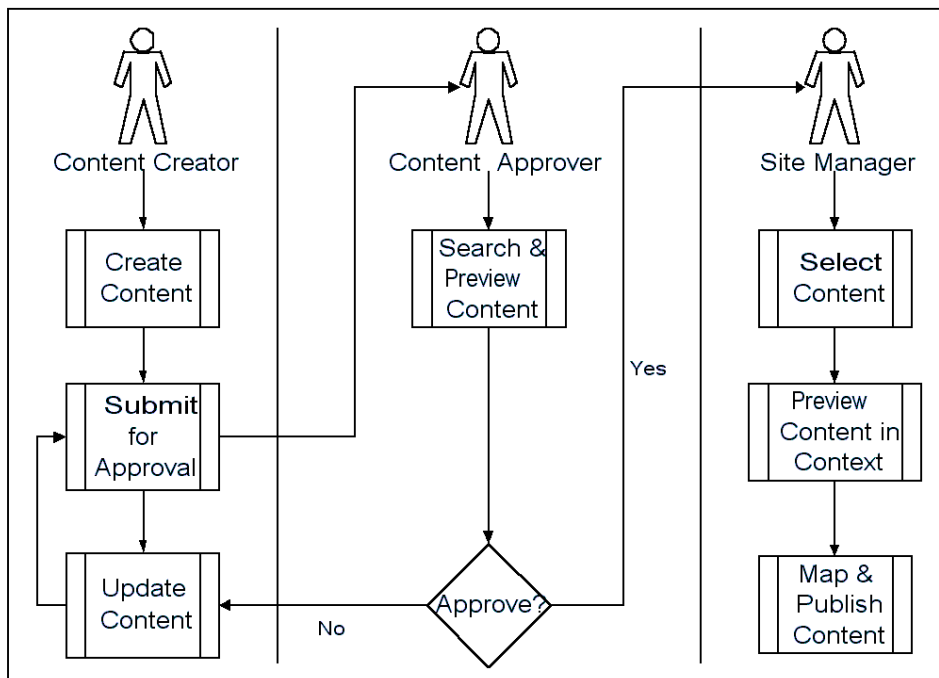
3. **Content item is approved.**

If the site administrator has the OCM Approve permission, the content is automatically approved --- if not, another user (with the permission) can use the Site Administration UI or the OCM UI to approve the content.

4. **Content item is associated to an iStore object.**

The site administrator uses the Site Administration UI to assign Approved content items to iStore objects (products, sections, or media objects).

The following figure, [Figure 24-1, "Oracle iStore-Oracle Content Manager Business Flow"](#) shows the flow.

**Figure 24–1 Oracle iStore-Oracle Content Manager Business Flow**

## 24.4 Implementing Oracle iStore-OCM Integration

Integration with Oracle Content Manager is optional.

**Note:** This section assumes you have installed Oracle iStore and Oracle Content Manager, and performed any required post-installation steps.

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**CAUTION:** Once you integrate Oracle iStore with Oracle Content Manager, you **cannot undo** the integration.

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The following are the implementation steps:

1. [Step 1 - Migrate Attachments from File System to Database](#)
2. [Step 2 - Run Data Migration Concurrent Program](#)
3. [Step 3 - Set Profile Options](#)

4. [Step 4 - Modify Oracle iStore Menu](#)
5. [Step 5 - Grant OCM Privileges to Site Administrator](#)
6. [Step 6 - Test Oracle iStore-OCM Integration](#)

### 24.4.1 Step 1 - Migrate Attachments from File System to Database

Oracle Content Manager does not support storing files in the file system. Therefore, you must migrate any attachments (files used in iStore) from the file system to the database. Use the following procedure.

1. Log in to the Oracle iStore Site Administration UI as the site administrator.
2. Manually change the URL to:  
`http://<host>:<port>/OA_HTML/ibemdmgt.jsp`
3. In the file system to database lob migration screen that appears, press the **Migrate** button to migrate attachments.

### 24.4.2 Step 2 - Run Data Migration Concurrent Program

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, iStore Oracle Content Manager Integration Migration.

Both existing customers and new customers who want to use the OCM integration must run the concurrent program **one time** as a mandatory step to migrate the seed and customer data.

**Important:** Ensure that the profile option, IBC: Use Access Control, is set to No at site level before running the data migration concurrent program.

**Note:** When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets the profile option, IBE: Use Content Management Integration, to Yes at site level.

See [Section 24.7, "Concurrent Program to Migrate Data"](#), for details.

### 24.4.3 Step 3 - Set Profile Options

Set the following profile options:

1. **IBE: Default Home Folder** --- Set at application level, using the value, /IBE. Setting this profile option allows the site administrator to access the correct OCM folder.

See the *Oracle Content Manager Implementation Guide* for additional details.

2. **IBC: Use Access Control** --- Set at site level (the only allowable setting). This profile option specifies whether permission/privilege checking is performed in the OCM pages.

Set to No to not use any permission checking in the OCM pages. This is the recommended setting --- unless you are going to use privilege checking for site administrators.

Set to Yes to use privilege checking. If set to Yes, additional privileges must be awarded the iStore administrator. See [Section 24.4.5, "Step 5 - Grant OCM Privileges to Site Administrator"](#), and the *Oracle Content Manager Implementation Guide* for additional details.

3. **IBE: Use Content Management Integration** --- When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets this profile option to Yes at site level. If it is not set at site level in your implementation, be sure to set it at site level. See [Section A.16.0.130, "IBE: Use Content Management Integration"](#).
4. **IBE: Number of Days for Expiring Content** --- Set to an integer at iStore application level. If integrating with OCM, the Usage Summary page in the Site Administration UI performs a default search of content items based on the number of days defined in this profile option. Oracle iStore reads the value of this profile option ( $x$ ) and includes only those content items whose expiration date is that number of days ( $x$ ) or less from system date (current date).

This profile option defaults to Null if not set. If left at the default value of Null, the search results will include all content, regardless of expiration date.

For more information on the Usage Summary pages, see [Section 24.6, "Usage Summary Pages"](#).

Bounce the Apache server after making these profile option settings.

You may wish to set additional OCM profile options, depending on your business requirements. See the *Oracle Content Manager Implementation Guide* for details.

## 24.4.4 Step 4 - Modify Oracle iStore Menu

In order for the Oracle Content Manager subtabs to appear within the Site Administration UI's Content tab, you must replace the default Site Administration UI Content tab with the Oracle Content Manager integrated menu. Use the following steps.



**Important:** Avoid using the seeded SYSADMIN user to log into Oracle Forms and make the menu prompt changes. Use another user to login and make the changes.

1. Log in to Oracle Forms as a user other than SYSADMIN, using Application Developer responsibility.
2. Navigate to Application > Menu. The Menus window opens. Use the Menus functionality to do the following:
3. Within the iStore Merchant Root menu (IBE\_M\_MENU\_ROOT):
  - a. Remove the Content prompt from submenu iStore Content tab (IBE\_M\_CONTENT).
  - b. Set the Content prompt to submenu iStore and iContent Content tab (IBE\_M\_CONTENT\_IBC).
  - c. Save the changes.
4. Remember to bounce the Apache server after making these changes.

For instructions on how to modify menus and functions, see: *Oracle Applications System Administrator's Guide*.

## 24.4.5 Step 5 - Grant OCM Privileges to Site Administrator

If the profile option, IBC: Use Access Control is set to Yes, you must grant OCM privileges to the site administrator(s). Log into Oracle Content Manager with the OCM Superuser responsibility and grant the desired content privileges to the site administrator(s) for the folder, / IBE. Jie

The site administrator will be able to view and use approved content items in iStore, regardless of the privileges assigned. However, some functionality may be limited depending on the privileges awarded.

See the *Oracle Content Manager Implementation Guide* for additional details.

## 24.4.6 Step 6 - Test Oracle iStore-OCM Integration

Bounce the Apache server and log in to the Site Administration UI. Following the successful integration of Oracle Content Manager, several UI and functionality changes occur in the Site Administration UI. It is recommended that you fully test the integration, using the information in [Section 24.5, "Site Administration Behavior with OCM Integration"](#), below, to guide you.

## 24.5 Site Administration Behavior with OCM Integration

After the successful integration of Oracle iStore and Oracle Content Manager, changes occur within the Content tab in the Oracle iStore Site Administration UI. And, the concept of source files associated with media objects is replaced by the concept of content items.

This section's topics include:

- [Section 24.5.1, "Existing Site Administration Subtabs and Related Functionality Changes"](#)
- [Section 24.5.2, "Additional Site Administration Subtabs and Related Functionality Changes"](#)

### 24.5.1 Existing Site Administration Subtabs and Related Functionality Changes

Following is the behavior of the existing Oracle iStore subtabs and related functionality in the Oracle iStore Site Administration UI, following the integration with Oracle Content Manager.

1. **Content Repository** subtab --- The Content Repository subtab is removed from the Content tab.
2. **IBE: Use Database for Media Storage** profile option --- Oracle iStore ignores the value of this profile option.
3. **Media Objects** subtab --- The Media Objects subtab remains within the Content tab.
4. **Source files terminology** --- With OCM integration, the terminology "source files" is replaced with "content items." Otherwise, media object functionality is the same with and without OCM integration. See [Section 9.3, "Understanding Media Objects"](#), for more information.

### 24.5.2 Additional Site Administration Subtabs and Related Functionality Changes

Following is the behavior of the additional Site Administration subtabs and related functionality which appear following the integration with OCM.

**Note:** With the exception of the Usage Summary subtab information, the following documentation provides a high-level view of the additional subtabs and their purposes, since these are identical to the subtabs found in OCM. See the *Oracle Content Manager Implementation Guide* and the *Oracle Content Manager User Guide*, available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>) for more information.

1. **Usage Summary** subtab --- The Usage Summary subtab appears within the Content tab. This page is designed to give you summary information about how content items are being used in your sites. This is the only one of the OCM integration subtabs which is owned by the Oracle iStore application. The usage of this subtab is described in [Section 24.6, "Usage Summary Pages"](#).
2. **My Content** --- This subtab contains the content item creation screens. It also allows searching and summary views of content items. This subtab appears only if you are integrating Oracle iStore with OCM.
3. **Library** --- This subtab shows all content in categories.
4. **Pending Approvals** --- This subtab displays content that is awaiting approval.
5. **Trash** --- This subtab displays content that has been deleted.

## 24.6 Usage Summary Pages

Within the Content tab, the Usage Summary subtab shows approved content items that have been associated with media objects. These are the Live versions viewable in the Customer UI (provided that the product, section, and site in which they appear are viewable). The information presented helps you understand how content items are being used in your sites.

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**Note:** Only **approved** versions of a content item can be associated with Oracle iStore media objects.

The Usage Summary page does not check whether the product, section, or site using a content item is in Published or Unpublished status, or in the case of sites, within viable dates. When content items have been associated to an Oracle iStore media object, they are considered **Live**.

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---

The Usage Summary pages also allows you to update associations with the latest version of an approved content item, to access details about a content item and its usage, and to see and alter which version of a content item is live in the sites.

Following are the main tasks that can be performed in the Usage Summary subtab:

1. Apply the latest approved version of a content item to an Oracle iStore object, if a previous version has been associated to an iStore media object
2. Access content item details

3. Access usage details for a specific content item -- see [Section 24.6.3, "Viewing Usage Details and Changing Live Version"](#)
4. Replace an associated content item with a new one

Other topics in this section include:

- [Section 24.6.1, "Usage Summary: Content Usage by Sites Page"](#)
- [Section 24.6.2, "Applying the Latest Version of a Content Item"](#)
- [Section 24.6.3, "Viewing Usage Details and Changing Live Version"](#)
- [Section 24.6.4, "Replacing Content Items"](#)
- [Section 24.6.5, "Content Items Search Utility"](#)

## 24.6.1 Usage Summary: Content Usage by Sites Page

Following the successful integration of Oracle Content Manager, when you select the Content tab, the Usage Summary: Content Usage by Sites page appears. This page summarizes the content items and how they are being used in your sites, through their associations to media objects.

To apply the latest version of a content item, select the Apply Latest Version button. See [Section 24.6.2, "Applying the Latest Version of a Content Item"](#).

The summary is presented in the Results table, which includes the following columns:

- **Select** -- Use this checkbox to select a content item for update.
- **Content Item** --- This sortable column displays the content item file name. Select the hyperlink of the content item to view OCM's Content Item Details page for the item. See [Section 24.6.3, "Viewing Usage Details and Changing Live Version"](#).
- **Content Type** --- This sortable column displays the content item type. See [Section 24.1.2, "Oracle Content Manager Integration Key Terms and Definitions"](#).
- **Live Version** --- This column displays the version of the content item that is live in a site(s). Note that the *highest* version number is always the *latest* version.

**Important:** The section or product associated with the content item must also be Published and active in order for the content item to display. See [Section 24.6.3, "Viewing Usage Details and Changing Live Version"](#). See also, [Chapter 8, "Implementing the Catalog"](#), and [Chapter 9, "Implementing Content"](#).

- **Available Date** --- This sortable column shows the first available date of the content item, if one exists. Available date is an optional field for a content item.
- **Expiration Date** --- This sortable column shows the expiration date of the content item, if one exists. Expiration date is an optional field for a content item.
- **Usage** --- The Usage icon allows access to the iStore Usage Summary: Content Item Usage screen. See [Section 24.6.3, "Viewing Usage Details and Changing Live Version"](#).
- **Replace** --- The Replace icon allows access to the iStore Usage Summary: Replace Content Item screen. See [Section 24.6.4, "Replacing Content Items"](#).
- **Latest Version** --- Shows a checkmark if the item is the latest available version. See [Section 24.6.2, "Applying the Latest Version of a Content Item"](#).

## 24.6.2 Applying the Latest Version of a Content Item

You can use the Usage Summary main page to quickly apply the latest version of a content item to an already established association. When the latest version is applied, all associations between the content item and media objects (including media objects mapped to products, sections, content components, and categories) are automatically updated. Use the following procedure.

### Steps

1. Navigate to the Usage Summary main screen by selecting the Content tab, Usage Summary subtab. The Usage Summary: Content Usage by Sites page appears.

Content items displayed by default in the Results table depend upon the value of the profile option, IBE: Number of Days for Expiring Content. Optionally, perform a search for content items. See [Section 24.6.5, "Content Items Search Utility"](#), for instructions.

2. Select the content item by activating its Select checkbox.
3. Select the Apply Latest Version button.

The latest version is now applied, and all existing associations are updated.

## 24.6.3 Viewing Usage Details and Changing Live Version

Select the Usage icon in the Usage Summary: Content Usage by Sites page Results table to retrieve the Usage Summary: Content Item Usage page; this page allows you to:

- View all associations for the content item
- Select another version of the content item to make the Live version -- this can be the latest version or an older version
- Navigate to the Update Media Object page by selecting the media object in the Used By table

The Usage Summary: Content Item Usage page shows the following:

- **Content Item** --- Displays the name of the content item being viewed.
- **Content Type** --- Displays the type of the content item.
- **Live Version** --- Use this LOV to select another version to be the Live version. Only live versions of content items are available in the Customer UI. Note that the *highest* version number is always the *latest* version.
- **Available Date** --- Displays the available date of the content item, if applicable.
- **Expiration Date** --- Displays the expiration date of the content item, if applicable.
- **Used By Table** --- The Used By table shows the following:
  - **Focus icon** --- You can use the focus icon to focus on a particular media object association and its sub-items.
  - **Object hyperlinks in Name column** --- Each object listed in the table is a hyperlink which allows you to drill down to the object's update page. In these pages, you can perform normal content maintenance on the object. See [Chapter 8, "Implementing the Catalog"](#), and [Chapter 9, "Implementing Content"](#), for more information.
  - **Type column** --- This column shows the type of the Oracle iStore object in the Name column.
  - **Site column** --- This column lists the sites in which the content item is included.

## 24.6.4 Replacing Content Items

In the Usage Summary pages, you can replace a content item with another content item, and Oracle iStore automatically updates all existing associations with media objects --- including the mapping between the media objects and content components, categories, products, and sections.

Use the Usage Summary: Replace Content Item page to replace content items. Use the following procedure.

### Steps

1. Navigate to the Usage Summary main screen by selecting the Content tab. The Usage Summary: Content Usage by Sites page appears.

Content items displayed by default in the Results table depend upon the value of the profile option, IBE: Number of Days for Expiring Content. Optionally, perform a search for content items. See [Section 24.6.5, "Content Items Search Utility"](#), for instructions.

2. Select the Replace icon for the content item. The Usage Summary: Replace Content Item page appears.

The Replace Content Item screen has the following two main areas:

- **Current Content Item** --- This area shows the information about the content item, such as name, version, effective dates, and language data. For more information on these fields, see the *Oracle Content Manager User Guide*.
- **Replace with** --- This area allows you to select another content item to replace the existing one.

3. In the *Replace with* area, select the search icon next to the Content Item Name textbox. If desired, you can enter a partial search string in the textbox to limit the items retrieved. There is no need to add a % sign, as Oracle iStore automatically appends this wildcard.

The Search and Select: Content Items screen appears.

4. In the Search and Select: Content Items screen, search for content items.

Once the desired content item is displayed in the list, select the content item's Select checkbox and press the Select button to apply the selection.

5. When you return to the Usage Summary: Replace Content Item screen, the details of the content item will populate the *Replace with* area.

6. Select Apply to save the changes.

The previous content item is now replaced with the new item, and all existing associations are updated.

## 24.6.5 Content Items Search Utility

Within the Content tab, select the Usage Summary subtab and then enter search criteria to perform a search of content items.

When accessing the Usage Summary screen, both in the Simple and Advanced Search screens, a default search is performed to limit the display of content items. The default results will display all content items that are expiring in  $x$  days from the system date. The  $x$  days is set in the profile option, IBE: Number of Days for Expiring Content. See [Section 24.4.3, "Step 3 - Set Profile Options"](#), for details.

### 24.6.5.1 Steps to Perform a Content Items Simple Search

1. Log in to the Site Administration UI and navigate to Content > Usage Summary.
2. In the Search area of the Usage Summary page, enter search criteria as follows:
  - **Search by** --- Use this LOV to select the parameter to search by. Options are: Content Name and Content Type. Use the textbox to the right of the LOV to enter partial values. You may use the % sign as a wildcard if desired.
  - **Expiration Date Range** --- Use the calendar icons to select the date range within which to search; this should be based on the content item's expiration date.
  - **Go** --- Select the Go button to launch the search.
3. After you press Go, the search results are returned in the Results table.

### 24.6.5.2 Steps to Perform a Content Items Advanced Search

1. Log in to the Site Administration UI and navigate to Content > Usage Summary. Select the Advanced Search button.
2. In the Advanced Search page, enter search criteria as follows:
  - **Content Item** --- Use this textbox to enter all or partial values for the content item name(s) that you wish to locate. You may use the % sign as a wildcard if desired.
  - **Content Type** --- Use this LOV to select the type of content that you wish to limit the search to.
  - **Available Date Range** --- Use the calendar icons to select the date range within which to search. The search is performed on the available dates of content items.



- **Expiration Date Range** --- Use the calendar icons to select the date range within which to search. The search is performed on the expiration dates of content items.
  - **Go** --- Select the Go button to launch the search.
  - Select *Show Content items that do not display the latest approved version* to include all versions of content items in the search.
3. After you press Go, the search results are returned in the Results table.

## 24.7 Concurrent Program to Migrate Data

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, iStore Oracle Content Manager Integration Migration.

**Important:** Please make sure the profile option, IBC: Use Access Control, is set to No at site level before running the data migration concurrent program.

Both existing and new customers who want to use the OCM integration must run the concurrent program **one time** as a mandatory step to migrate the seed and customer data.

Topics in this section include:

- [Section 24.7.1, "Running the iStore Content Items Migration Concurrent Program"](#)
- [Section 24.7.2, "Understanding the OCM Integration Profile Option"](#)
- [Section 24.7.3, "Concurrent Program Process Flow"](#)
- [Section 24.7.4, "Concurrent Program Parameters"](#)
- [Section 24.7.5, "Migration Logic of Concurrent Program"](#)
- [Section 24.7.6, "File Extensions Used for Attachment Categorization"](#)
- [Section 24.7.7, "Concurrent Program Output"](#)

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**CAUTION:** Back up your system before performing the migration. Once the migration has occurred, you cannot reverse the migration.

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## 24.7.1 Running the iStore Content Items Migration Concurrent Program

The migration script is implemented as a concurrent program that can be run in two modes:

- **Evaluation mode** --- The data is not migrated. Instead the concurrent program provides an output including a summary of the migrated data as well as any exceptions detected before the migration process.
- **Execution mode** --- In this mode, the data migration occurs.

See [Section B.12, "Running Concurrent Programs"](#), for instructions on how to run the concurrent program. Refer to *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

## 24.7.2 Understanding the OCM Integration Profile Option

When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets the profile option, IBE: Use Content Management Integration, to Yes, at site level.

**Note:** The concurrent program will only set the profile to Yes when run in execution mode.

Note that you cannot use this profile option to turn "off" the integration between Oracle iStore and Oracle Content Manager.

## 24.7.3 Concurrent Program Process Flow

The user will typically:

1. Run the concurrent program in evaluation mode to check if there is any exception.
2. If there are exceptions, the user can fix the exceptions by making the adequate set up in the Site Administration UI before running the migration script in execution mode.
3. The user then runs the concurrent program in execution mode.

## 24.7.4 Concurrent Program Parameters

The following table shows the concurrent program parameters:

**Table 24–1 OCM Migration Concurrent Program Parameters**

Parameter	Field Type	Description
Running Mode (mandatory)	Drop down list	The drop down list contains two values: Evaluation and Execution Default value: Evaluation
Default Language (mandatory)	Drop down list	List Language Name in the drop down list. Default: User session Language. This parameter is used as a default language for ALL (language) and ALL (Site) mappings.

### 24.7.5 Migration Logic of Concurrent Program

As a pre-requisite, the migration script migrating attachments from the file system to the database has to be run. One has to make sure the migration script has been run successfully. Only attachments properly migrated in the database will be migrated in Oracle Content Manager.

The concurrent program executes the following steps (these are not exposed to the end user).

1. Categorization of the attachments. This can be done through file extension-OCM content type mapping.

When there is no corresponding OCM content type existing for a file extension, the attachment is migrated to a content item of type “media”.

2. Analysis of media object source file mappings.

This step will report all the successful migrated attachments, and will highlight the exceptions -- when more than one source file mapped to different OCM content types needs to be merged under the same content item. The iStore administrator can define a new mapping to fix the exception; otherwise, the new content item will have the type "Media".

For all exceptions in conflict attachment type, the content item type is set to be "Media" no matter if it is seed media object or not.

### 24.7.6 File Extensions Used for Attachment Categorization

The following table shows the file extensions used to migrate attachments in the right content type:

**Table 24–2 File Extensions Used for Attachment Categorization**

File Extension	Name of File Format	Content Type
*.jpg, *.jpeg, *.jif, *.jpe	JPEG File Interchange Format	Image
*.png	Portable Network Graphics	Image
*.gif, *.gfa	Graphics Interchange Format	Image
*.html, *.htm	Hypertext Markup Language	HTML
Any other file extension	N/A	Media

24.7.7 Concurrent Program Output

The concurrent program generates an output, either in execution or evaluation mode. The concurrent program output includes:

- A summary of the migrated data
- A list of exception cases happening during the migration process
- A list of content items created and attachments successfully migrated during the migration process, grouped by media object

The table below lists the information presented in the concurrent program output

**Table 24–3 Oracle iStore Content Items Migration Concurrent Program Output**

Prompt or column heading	Format	Description
Parameters section		
Running mode	text	Either Evaluation or Execution, depending upon the parameter entered by the user.
Default language	text	Default language used as a default base language (Language Description)
SECTION 1 – Migration Summary		
Number of content items created	integer	Number of content items created during the migration process
HTML	integer	Number of content items of type HTML created during the migration process
Image	integer	Number of content items of type image created during the migration process
Media	integer	Number of content items of type media created during the migration process

**Table 24–3 Oracle iStore Content Items Migration Concurrent Program Output**

<b>Prompt or column heading</b>	<b>Format</b>	<b>Description</b>
<b>SECTION 2.1 – Attachments with unknown file extension</b>		
Attachment	240 char max (variable size)	Attachment access name. In the report, attachment names are not truncated and expand on the right (can be a long string since it may include file path as well as the file name).
<b>SECTION 2.2 – Media objects with attachments of different types</b>		
Media Access Name	40 char fixed size	Media access name
Seeded	6 char fixed size	"Yes" for seeded mapping of media objects, "No" for non seeded mapping of media objects
Store name	40 char fixed size	Store name truncated to the first 40 characters
Language	30 char fixed size	Language description
Attachment	240 char max variable size	Attachment name
<b>SECTION 3 – Migration detailed report</b>		
Media access Name	40 char fixed size	Media access name
Content item code	45 char fixed size	Content item code
Store name	40 char fixed size	Store name truncated to the first 40 characters
Language	30 char fixed size	Language description
Attachment	240 char max variable size	Attachment name



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# Integrating Oracle iStore with Oracle iSupport

This chapter describes the integration of Oracle iStore 11i with Oracle iSupport.

Main topics in this chapter include:

- [Section 25.1, "Overview of Oracle iSupport"](#)
- [Section 25.2, "Overview of Oracle iStore Functionality with Oracle iSupport"](#)
- [Section 25.3, "Integrating Oracle iSupport with Oracle iStore Site Management"](#)
- [Section 25.4, "Using Oracle iSupport for Call Me Back Functionality"](#)

## 25.1 Overview of Oracle iSupport

Oracle iSupport is a comprehensive customer service portal that allows users to receive self-service and assisted-service over the Internet. It provides a personalized self-service experience to users for many functions. Oracle iSupport accomplishes the following goals for a service organization:

- Reduces customer support costs by empowering customers to perform self-service tasks, such as creating and tracking their service requests
- Enhances customer satisfaction by providing easy access to the same product information and knowledge base that the support organization uses to resolve customer issues
- Provides real time online transactional inquiries to customers on orders, returns, invoices, contracts, and payments
- Provides a platform for users to collaborate among themselves through forums

## 25.2 Overview of Oracle iStore Functionality with Oracle iSupport

You can utilize the integration with Oracle iSupport for the following:

- **Support Site Management** -- See [Section 25.3, "Integrating Oracle iSupport with Oracle iStore Site Management"](#)
- **Call Me Back** -- See [Section 25.4, "Using Oracle iSupport for Call Me Back Functionality"](#)

## 25.3 Integrating Oracle iSupport with Oracle iStore Site Management

You can integrate Oracle iSupport with Oracle iStore to provide a complete support dashboard from the Oracle iStore Customer UI. Using this dashboard, you can allow customers to navigate to Oracle iSupport pages and potentially access service requests, knowledge base, forums, and other Oracle iSupport features. If implemented, users of Oracle iSupport can select a universal navigation icon, called Return to Dashboard, to return to the Oracle iStore Site Selection Page in the Customer UI.

This section's main topics include:

- [Section 25.3.1, "Summary of Site Management Options for Oracle iSupport"](#)
- [Section 25.3.2, "Support Home Page"](#)
- [Section 25.3.3, "Setting up a Support Site - Sample Scenario"](#)
- [Section 25.3.4, "Enabling Sites Navigation Icon"](#)
- [Section 25.3.5, "Enabling the Quick Links Bin"](#)
- [Section 25.3.6, "Enabling the Support Group Bin"](#)
- [Section 25.3.7, "Oracle iStore Customer UI Access for Oracle iSupport Users"](#)
- [Section 25.3.8, "Registration for Oracle iSupport Users"](#)
- [Section 25.3.9, "Customizing Oracle iSupport User Profile Pages"](#)
- [Section 25.3.10, "Example Business Scenarios"](#)

### 25.3.1 Summary of Site Management Options for Oracle iSupport

This section summarizes the options available in the site management integration. Topics include:

- [Section 25.3.1.1, "Support Dashboard and Other Customer UI Options"](#)



- [Section 25.3.1.2, "User Access Control and User Management Options"](#)

### 25.3.1.1 Support Dashboard and Other Customer UI Options

Following are some of the Customer UI implementation options when integrating Oracle iSupport with Oracle iStore's site management capabilities:

- Create a Support Home Page with links to the Oracle iSupport application --- See [Section 25.3.2, "Support Home Page"](#), and [Section 25.3.3, "Setting up a Support Site - Sample Scenario"](#).
- Target content in bins --- For example, set up a bin that allows customers to access service requests and other features of Oracle iSupport. You can map bins to section page locations using Configurable Layout for bins. See [Section 25.3.5, "Enabling the Quick Links Bin"](#), and [Section E.18, "Oracle iSupport Integration Display Templates"](#).
- Allow Oracle iSupport users to navigate back to the site portal from Oracle iSupport --- See [Section 25.3.4, "Enabling Sites Navigation Icon"](#).
- Implement sites with targeted catalog and pricing information --- See [Section 8.3, "Catalog Overview"](#), and [Section 5.2, "Creating Sites"](#).
- Map sections to specific templates designed to display your content items --- See [Section 8.5, "Section Templates Overview"](#).
- Leverage Oracle iStore's globalization features, such as multiple languages and currencies support --- See [Section 5.1, "Site Management Overview"](#), and [Section 17.2, "Oracle iStore Key Global Features and Benefits"](#).

### 25.3.1.2 User Access Control and User Management Options

Following are some of the user management implementation options when integrating Oracle iSupport with Oracle iStore's site management capabilities:

- Restrict access to sites based on user responsibility --- See [Section 5.1, "Site Management Overview"](#), and [Section 25.3.7, "Oracle iStore Customer UI Access for Oracle iSupport Users"](#).
- Support Oracle iSupport user types and registration --- See [Section 25.3.8, "Registration for Oracle iSupport Users"](#).
- Customize user profile screens specifically for support customers --- See [Section 25.3.9, "Customizing Oracle iSupport User Profile Pages"](#).

## 25.3.2 Support Home Page

Support specialty sites (the main tab of which can display as Support Home Page) are associated to a single responsibility associated to a menu that has support functions, enabled within the Quick Links bin. This bin displays the intersection of menu functions derived by the user responsibility and the site responsibility. See [Section 25.3.5, "Enabling the Quick Links Bin"](#), for setup information.

This navigation bin also can be displayed in a guest user site, so that guest users can access the knowledge base and other information that does not require login. See [Section E.3, "Seeded Bin Display Templates"](#), [Section E.18, "Oracle iSupport Integration Display Templates"](#), and the Oracle iSupport documentation for more information.

## 25.3.3 Setting up a Support Site - Sample Scenario

Following is a high-level example to set up a support site. Note that this is a sample scenario only. Your business requirements may dictate other methods of building sites.

1. Ensure that your user registration and approval processes are set up. Start with [Section 25.3.8, "Registration for Oracle iSupport Users"](#).
2. Create a site and assign it to the Support group. See [Section 5.2, "Creating Sites"](#).
3. Create your section hierarchy, with or without sections for products, depending upon your business requirements. See [Section 8.8.1, "Creating Sections"](#).
4. Name one of the top-level sections, Support.
5. Create subsections under Support, for example, Technical Library and Knowledge Base.
6. Assign the sections to the site you created in step 2. See [Section 8.8.4, "Assigning Sections to Sites"](#).
7. Assign one of the content-specific section Display Templates to the sections created above. See [Section 8.6, "Section Templates": Multilevel Subsection List with Content](#) and [Section Detail](#). As a best practice, use Multilevel Subsection List with Content for non-Leaf sections, and Section Detail with Leaf sections. For a discussion of section types, see [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#).
8. Map content files to media objects, either using the seeded ones or ones that you create. See [Section 9.3.4, "Assigning Content Items to Media Objects"](#).

9. Map the media objects to content components designed to show section additional information (see [Section 9.2.1.6, "Section Additional Information 1 Through 5"](#)).
10. Map the content components at the section level, using the sections created above. See [Section 8.8.5, "Adding Content to Sections"](#).
11. Set up the Quick Links bin, as described in [Section 25.3.5, "Enabling the Quick Links Bin"](#).
12. Enable the Support group bin, as described in [Section 25.3.6, "Enabling the Support Group Bin"](#).

### 25.3.4 Enabling Sites Navigation Icon

To enable users to navigate back to the Customer UI from Oracle iSupport through a universal navigation icon called Return to Dashboard, you must link the seeded Site Selection and Site Home page functions to the Oracle iSupport menu root. After these two functions are mapped to the Oracle iSupport customer root menu, the navigation icon will appear at the top of the Oracle iSupport customer pages.

**Important:** If you implement the Dashboard navigation icon in Oracle iSupport, you must also use the Oracle iStore site management, login, and user profile pages.

Following is the function data for the Site Selection Page and Site Home Page:

- **Site Selection Page:**
  - Function: IBE\_C\_SITE\_SELECTION
  - User function name: iStore Site Selection Page
  - Type: JSP
  - HTML call: ibeCZzdMinisites.jsp
- **Site Home Page:**
  - Function: IBE\_C\_SITE\_HOME
  - User function name: iStore Site Home Page
  - Type: JSP
  - HTML call: ibeCZzpHome.jsp

For data on the Oracle iSupport root menu, see the *Oracle iSupport Implementation Guide*.

### 25.3.5 Enabling the Quick Links Bin

You can enable a Quick Links bin on the Support dashboard to provide support users with links to Oracle iSupport features, such as service requests, knowledge base, and forums. Out-of-the-box, this bin is mapped to a JSP, but you must create a menu linked to a responsibility to allow users with the responsibility to see the bin.

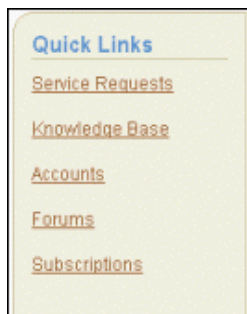
The bin has the programmatic access name, `STORE_QUICK_LINKS_BIN_IBEWC`, and is mapped by default to the JSP, `ibeCAcdQuickLinkBin.jsp`.

Following are the steps to enable the bin:

1. All links inside the Quick Links bin are retrieved from Oracle Applications (FND) menus. In Oracle Forms, navigate to Application Developer > Menu.
2. Create the Quick Links menu root. Then create all the menu entries under the quick links menu root (up to two levels allowed). You can use any submenus and functions that are already associated to the menu of the responsibility assigned to the site. Be sure to define prompts for all functions.  
**Important:** Ensure that the menu tree does not have any functions with empty prompts.
3. Save the menu.
4. Attach the Quick Links menu to the responsibility menu, directly under the user menu root (second level).
5. Set the prompt of the Quick Links menu root to empty.
6. Set the value of the profile option, IBE: Quick Links Menu, to the Quick Links root menu code. The corresponding responsibility is the one to which the quick links menu is assigned; thus, the value of the profile option should be the specific responsibility associated to the site.

All links inside the bin will be rendered as relative URLs. Thus, if the container page is non-secure, all the links inside the bin will be non-secure as well, and vice versa.

The figure below, [Figure 25–1, "Example Support Quick Links Bin"](#), shows how the Quick Links bin might look in a site management implementation with Oracle iSupport.

**Figure 25–1 Example Support Quick Links Bin**

### 25.3.6 Enabling the Support Group Bin

Oracle iStore seeds a bin template which displays specialty sites associated to the group, Support. To display this group, map the logical template, SUPPORT\_GROUP\_BIN\_IBEWC, to the bin layout component of your choice. See [Section 8.10.5, "Using Configurable Bin Layout"](#), for instructions. See [Section E.18, "Oracle iSupport Integration Display Templates"](#), for more information about the bin template.

See also: [Section 8.10.6, "Group Bins"](#)

### 25.3.7 Oracle iStore Customer UI Access for Oracle iSupport Users

Oracle iStore restricts access to its Customer UI pages by checking users' responsibilities. Further restrictions are provided through user roles. The responsibilities your specialty sites will support must be associated to specific sites during setup. Oracle iStore supports all Oracle iSupport responsibilities, both seeded and non-seeded, provided that you map these responsibilities to sites. If a site allows guest user access, in the Site Selection Page, all specialty sites available to the guest user are displayed.

See [Section 5.1, "Site Management Overview"](#), for more information.

For specific information on Oracle iSupport responsibilities, see the *Oracle iSupport Implementation Guide*.

### 25.3.8 Registration for Oracle iSupport Users

During registration, each Oracle iSupport end-user is assigned at least one responsibility through an association with his username. As with other Customer

UI users, initial registration of Oracle iSupport users should be done through Oracle iStore. Setup and support of enrollments, approval processes, and user types is handled through the Oracle CRM Technology Foundation HTML pages.

When you integrate Oracle iSupport with the Oracle iStore registration flows, the default setup is to award users default Oracle iStore responsibilities and roles in addition to the Oracle iSupport responsibilities and roles. This setup allows a user to register and receive all required permission to access both Oracle iSupport and the Oracle iStore Customer UI.

To enable this setup in the case of a combined Oracle iSupport-Oracle iStore implementation, you can either map the user type to two enrollments -- one associated to Oracle iSupport responsibility and role and the other associated to Oracle iStore responsibility and role -- or you can create one enrollment associated to a custom responsibility that integrates Oracle iStore and Oracle iSupport menus, and mapped to Oracle iSupport and Oracle iStore roles.

### **25.3.8.1 Activate Enrollment for iSupport Users**

By default, the Oracle iSupport enrollment is not active within the iStore user types. In the Oracle CRM System Administration console, activate the enrollment mapped to the appropriate user type.

For more information, see [Chapter 13, "Implementing User Management"](#), [Section C.7, "Site Management User Type Definitions"](#), the *Oracle Common Application Components Implementation Guide*, and the *Oracle Common Application Components User Guide*.

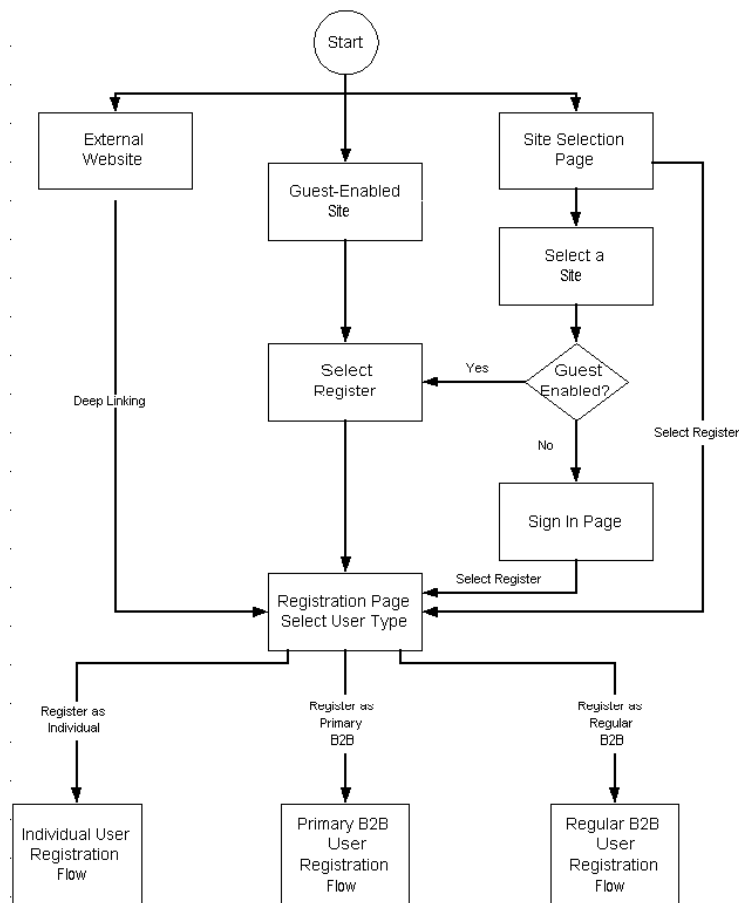
### **25.3.8.2 Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation**

Following is a sample registration flow in a combined implementation of Oracle iStore and Oracle iSupport, using Oracle iStore framework.

1. The user arrives at the registration page through one of the following paths:
  - From an external website, the user selects a deep link to the registration page.
  - The user navigates to the Site Selection Page and selects a site. If the site allows guest users, he is taken to the Site Home Page and can select the Register icon. If the site does not allow guest users, he is taken to the login page, and from there can select the Register icon.
  - The user navigates to the Site Selection Page and selects the Register icon.

- The user accesses a site which allows guest users and selects the Register icon.
2. From the Registration page, the user selects the appropriate user type for which he is registering. Depending upon his user type selection, he follows one of the following registration flows:
- Register as individual
  - Register your company
  - Register as a user of an existing company

The following diagram, [Figure 25–2, "Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation"](#), depicts the flow.

**Figure 25–2 Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation**

### 25.3.9 Customizing Oracle iSupport User Profile Pages

Out-of-box, all of the user and company profile pages will display the seeded Oracle iStore profile menus. To enable the Oracle iSupport profile menus, follow the step in [Section 13.8.3.3, "Steps to Configure Profile Menus"](#).



## 25.3.10 Example Business Scenarios

The following sample business scenarios with Oracle iStore and Oracle iSupport implemented together can enhance your understanding of the site management capabilities. See the following topics:

- [Section 25.3.10.1, "Sample Scenario 1 - Oracle iStore and Oracle iSupport Implemented in Same Site"](#)
- [Section 25.3.10.2, "Sample Scenario 2 - Oracle iStore and Oracle iSupport Implemented in Different Sites"](#)

These scenarios assume you have activate the appropriate Oracle iSupport enrollment(s) within the desired Oracle iStore user type.

### 25.3.10.1 Sample Scenario 1 - Oracle iStore and Oracle iSupport Implemented in Same Site

In this sample scenario, Oracle iStore and Oracle iSupport are implemented in the same site.

#### Sample User Type/Enrollments Setup

For this scenario, the following are the enrollments associated to each user type:

Primary User:

- Enrollment1: Responsibility B
- Enrollment2: Responsibility F
- Enrollment3: Responsibility L
- Enrollment4: Responsibility P

Business User:

- Enrollment1: Responsibility C
- Enrollment2: Responsibility G
- Enrollment3: Responsibility M
- Enrollment4: Responsibility Q

Individual User:

- Enrollment1: Responsibility D
- Enrollment2: Responsibility H

- Enrollment3: Responsibility N
- Enrollment4: Responsibility R

Guest user:

- Assigned to Responsibility A

### **Sample Groups Setup**

Sample groups defined are Group 1, North America, and Group 2, Europe. Each group has two sites within it, and each site has four supported responsibilities set up.

#### **Group 1 - North America**

- **Site 1 -- USA:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
  - Responsibility A = Oracle iStore and Oracle iSupport guest users
  - Responsibility B = Oracle iStore and Oracle iSupport primary users
  - Responsibility C = Oracle iStore and Oracle iSupport business users
  - Responsibility D = Oracle iStore and Oracle iSupport individual users
- **Site 2 -- Canada:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
  - Responsibility A = Oracle iStore and Oracle iSupport guest users
  - Responsibility F = Oracle iStore and Oracle iSupport primary users
  - Responsibility G = Oracle iStore and Oracle iSupport business users
  - Responsibility H = Oracle iStore and Oracle iSupport individual users

#### **Group 2 - Europe**

- **Site 3 -- UK:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
  - Responsibility A = Oracle iStore and Oracle iSupport guest users
  - Responsibility L= Oracle iStore and Oracle iSupport primary users
  - Responsibility M = Oracle iStore and Oracle iSupport business users
  - Responsibility N = Oracle iStore and Oracle iSupport individual users

- **Site 4 -- UK2:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
  - Responsibility A = Oracle iStore and Oracle iSupport guest users
  - Responsibility P= Oracle iStore and Oracle iSupport primary users
  - Responsibility Q = Oracle iStore and Oracle iSupport business users
  - Responsibility R = Oracle iStore and Oracle iSupport individual users

### **Usage Scenarios Related to Sample Enrollments and Groups**

Use the sample user type/enrollment and groups setups in the following cases:

**Case 1:** Access to Site Selection Page as guest user - no group selected

1. The Site Selection Page displays all sites associated to Responsibility A.
2. User drills down into US site.
3. The Products tab displays the catalog.
4. User can browse the catalog as guest user.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. User selects the Support tab. The Support Home Page displays a bin that allows the user to access iSupport as guest user and also access knowledge base information.

**Case 2:** Guest user logs in as primary user from Site Selection Page - no group selected

1. The Site Selection Page displays all sites associated to responsibilities B, L, F, and P.
2. The user, associated to Responsibility B, drills down into US site.
3. The Products tab displays the catalog.
4. The user can browse the catalog and place orders.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. The user selects the Support tab. The Support Home Page displays a bin that allows the user to access iSupport as primary user and also access service requests, subscriptions and knowledge base functionality.

### 25.3.10.2 Sample Scenario 2 - Oracle iStore and Oracle iSupport Implemented in Different Sites

In this sample scenario, Oracle iStore and Oracle iSupport are not implemented in the same site.

#### Sample User Type/Enrollments Setup

For this scenario, the following are the enrollments associated to each user type:

Primary User:

- Enrollment1: IBE\_CUSTOMER
- Enrollment2: Responsibility 3

Business User:

- Enrollment1: IBE\_CUSTOMER
- Enrollment2: Responsibility 4

Individual User:

- Enrollment1: IBE\_CUSTOMER
- Enrollment2: Responsibility 2

#### Sample Groups Setup

Sample groups defined are Group 1, North America, and Group 2, Europe. Each group has three sites within it.

##### Group 1 -- North America

- **Site 1 -- USA:** This site is guest user enabled and not restricted by responsibility.
- **Site 2 -- Canada:** This site is guest user enabled and not restricted by responsibility.
- **Site 3 -- Support:** This site is guest user enabled and is restricted by responsibility. It supports the following responsibilities:
  - Responsibility 1: iSupport individual guest user
  - Responsibility 2: iSupport individual registered user
  - Responsibility 3: iSupport B2B primary user
  - Responsibility 4: iSupport B2B non-primary user

##### Group 2 -- Europe

- **Site 4 -- UK:** This site is guest user enabled and not restricted by responsibility.
- **Site 5 -- France:** This site is guest user enabled and not restricted by responsibility.
- **Site 3 -- Support:** This site is guest user enabled and is restricted by responsibility. It supports the following responsibilities:
  - Responsibility 1: iSupport individual guest user
  - Responsibility 2: iSupport individual registered user
  - Responsibility 3: iSupport B2B primary user
  - Responsibility 4: iSupport B2B non-primary user

### **Usage Scenarios Related to Sample Enrollments and Groups**

Use the sample user type/enrollment and groups setups in the following cases:

**Case 1:** Access to Site Selection Page as guest user - no group selected

1. The Site Selection Page displays all sites associated to Responsibility A.
2. User drills down into US site.
3. The Products tab displays the catalog.
4. User can browse the catalog as guest user.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. User selects the Support Site link. The Support Home Page displays a bin that allows the user to access iSupport as guest user and also access knowledge base information.

**Case 2:** Guest user logs in as primary user from Site Selection Page - no group selected

1. The Site Selection Page displays all iStore and iSupport sites for primary users (Responsibility 3).
2. The user, associated to Responsibility 3, drills down into U.S. site.
3. The Products tab displays the catalog.
4. The user can browse the catalog and place orders.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.

6. The user selects the Support tab. The Support Home Page displays a bin that allows the user to access iSupport as primary user and also access service requests, subscriptions and knowledge base functionality.

The figure below, [Figure 25–3, "Example Site Selection Page: Different Store and Support Sites"](#), shows an example of how the Site Selection Page might look in an implementation of Oracle iStore and Oracle iSupport.

**Figure 25–3 Example Site Selection Page: Different Store and Support Sites**



The figure below, [Figure 25–4, "Example Support Dashboard"](#), shows an example of how the Oracle iSupport Dashboard might look in an implementation of Oracle iStore and Oracle iSupport.

**Figure 25–4 Example Support Dashboard**

## 25.4 Using Oracle iSupport for Call Me Back Functionality

By integrating iStore with iSupport, Oracle iStore provides call-me-back functionality whereby customers can select a link in the Customer UI's welcome bin to request a call from a merchant representative. The call request is processed in the Oracle Telephony Manager call center.

The callback feature requires integration of Oracle iStore with Oracle iSupport and Oracle Telephony Manager. See the *Oracle iSupport Implementation Guide* for details.

### 25.4.1 Setting up Call Back in Oracle iStore

After setting up Oracle iSupport and Oracle Telephony Manager, set the following profile option at the application level to iStore.

- **IBE: Use Call Me Back** --- Set to Yes to activate the callback feature.

The profile option defaults to No if not set.





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# Integrating Oracle iStore with Oracle Marketing

This chapter describes the integration of Oracle iStore 11i with Oracle Marketing.

This chapter's main topics include:

- [Section 26.1, "Overview of Oracle Marketing"](#)
- [Section 26.2, "Oracle iStore-Oracle Marketing Integration Overview"](#)
- [Section 26.3, "Oracle Marketing Products Integration Overview"](#)
- [Section 26.4, "Implementing Oracle Marketing Products Integration"](#)
- [Section 26.5, "Products Functionality with Oracle Marketing Integration"](#)
- [Section 26.6, "Product Creation and Maintenance Overview"](#)
- [Section 26.7, "Using Oracle Marketing to Provide Content in the Customer UI"](#)
- [Section 26.8, "Using Oracle Marketing for Personalization in the Customer UI"](#)

## 26.1 Overview of Oracle Marketing

An integrated part of the Oracle E-Business Suite, Oracle Marketing is a complete marketing automation application -- it helps companies win and retain profitable customers by enabling marketers to plan, execute, analyze, and optimize overlapping customer-focused programs.

See the *Oracle Marketing Implementation Guide* for more information. This guide is available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

### 26.1.1 Implementing Oracle Marketing

Install and set up Oracle Marketing according to the latest *Oracle Marketing Implementation Guide*.

This guide is available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 26.2 Oracle iStore-Oracle Marketing Integration Overview

Oracle iStore can leverage the following three components of Oracle Marketing functionality:

- 1. Product Creation/Management** --- Oracle Marketing's Products screens, if integrated, allow you to create and manage products from within the Site Administration application.  
  
See [Section 26.3, "Oracle Marketing Products Integration Overview"](#), for details.  
  
See [Section 7.1, "Products in Oracle iStore Overview"](#), for information about Oracle iStore's product maintenance capabilities.
- 2. Marketing Content Postings** --- Oracle Marketing's eMerchandizing module allows you to create marketing material that can be displayed on an Oracle iStore Customer UI web page, and to create rules that determine the content for a given posting.  
  
See [Section 26.7, "Using Oracle Marketing to Provide Content in the Customer UI"](#), for details.
- 3. Customer Event Capture** --- Oracle Marketing's Event Capture functionality allows you to capture and re-use information from customer visits to your specialty sites.  
  
See [Section 26.8, "Using Oracle Marketing for Personalization in the Customer UI"](#), for details.

## 26.3 Oracle Marketing Products Integration Overview

Oracle Marketing integration provides enhanced product creation and management capabilities for Oracle iStore in the Site Administration UI, including:

- Product creation
- Product template creation and maintenance

- Product maintenance, including updating Inventory and Order Management product attributes
- Product assignment to Inventory organizations
- Product assignment to Inventory categories
- Price list maintenance, including changing item prices and Units of Measure (UOMs)
- Oracle Bills of Material (BOM) definitions, including specifying item sequence, item, and quantity. Note that only standard bundling is supported.

This chapter discusses these capabilities in general terms. For specific, step-by-step instructions on how to use the Oracle Marketing screens, please refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

See [Section 7.1, "Products in Oracle iStore Overview"](#), for information about Oracle iStore's product maintenance capabilities without the Oracle Marketing integration.

**Note:** Regardless of whether you are integrating with Oracle Marketing, the product search in Oracle iStore (both Site Administration UI and Customer UI) will **not** retrieve products whose Web Status is set to `Disabled` (and Customer UI will not retrieve products which are `Unpublished`).

## 26.4 Implementing Oracle Marketing Products Integration

After applying Oracle iStore and its Oracle Marketing prerequisites, the following post-installation steps must be performed to enable the Oracle Marketing integration.

- [Step 1 - Set up iStore Administrator as CRM Resource](#)
- [Step 2 - Modify Oracle iStore Menu](#)
- [Step 3 - Set Profile Options](#)
- [Step 4 - Run Load Categories Concurrent Program](#)
- [Step 5 - Recompile the Key Flexfield Segments](#)

### 26.4.1 Step 1 - Set up iStore Administrator as CRM Resource

When integrating with Oracle Marketing Products screens, the iStore administrator must be a CRM Resource.

### Prerequisites

- The iStore administrator has been set up. See [Section 4.1.2.1, "Set up iStore Administrator"](#), for steps.
- The Resources module of the Oracle CRM Application Foundation is a prerequisite to setting up a user as a Resource. Implement Oracle CRM Application Foundation Resources module according to the most recent *Oracle CRM Application Foundation Implementation Guide*.

#### 26.4.1.1 Create an Employee

You may use the following steps to create an employee:

1. Log in to Oracle Forms with Human Resources responsibility.
2. Navigate to People > Enter and Maintain. Create an employee.

See *Using Oracle HRMS - The Fundamentals* for more information on setting up employee users.

#### 26.4.1.2 Associate Employee to iStore Administrator User

Associate the newly created employee to the user who is the iStore administrator:

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Security > User > Define.
3. Assign the employee created in the step above to the user who is the iStore administrator.

See the *Oracle Application's System Administrator's Guide* for more information.

#### 26.4.1.3 Import Employee as Resource

Import the newly created employee as a CRM Resource. Import the employee only after the association with the user has been made.

1. Log in to Oracle Forms with CRM Resource Manager responsibility.
2. Navigate to Maintain Resource > Import Resources.
3. Search for the employee created above and select Create Resource.

See the *Oracle CRM Application Foundation Implementation Guide* for more information.

## 26.4.2 Step 2 - Modify Oracle iStore Menu

In order for the Oracle Marketing menus to appear in the Site Administration UI, you must replace some of the default Site Administration UI menus with Oracle Marketing Products menus.

**Important:** Avoid using the seeded SYSADMIN user to log into Oracle Forms and make the menu prompt changes. Use another user to login and make the changes.

**Note:** Since you will be modifying only the submenus underneath the iStore Root menu assigned to the iStore Administrator, the submenus will be automatically associated to the iStore Administrator responsibility.

1. Log in to Oracle Forms as a user other than SYSADMIN, using Application Developer responsibility.
2. Navigate to Application > Menu. The Menus window opens. Use the Menus functionality to do the following:
3. Within the iStore Catalog tab menu (**IBE\_M\_CATALOG**):
  - a. Remove the Products prompt from submenu iStore Products sub tab (**IBE\_M\_CATALOG\_PRODUCTS**).
  - b. Set the Products prompt to submenu iStore and Marketing Products sub tab (**IBE\_M\_CATALOG\_PRODUCTS\_AMS**).
  - c. Save the changes.
4. Within the iStore Merchant root menu (**IBE\_M\_MENU\_ROOT**):
  - a. Remove the Advanced prompt from submenu iStore Advanced tab (**IBE\_M\_ADVANCED**).
  - b. Set the Advanced prompt to submenu iStore and Marketing Advanced tab (**IBE\_M\_ADVANCED\_AMS**).
  - c. Save the changes.
5. Remember to bounce the Apache server after making these changes.

For complete instructions on how to modify menus and functions, see the *Oracle System Administrator's Guide*.

## 26.4.3 Step 3 - Set Profile Options

The following profile options should be set or verified:

- [AMS: Item Validation Organization](#) and [IBE: Item Validation Organization](#)

- [IBE: Use Advanced Product Setup](#)
- [AMS: Inventory Item Update Allowed](#)
- [OSO: Debug Messages On](#)

#### 26.4.3.1 AMS: Item Validation Organization and IBE: Item Validation Organization

Set the AMS: Item Validation Organization and IBE: Item Validation Organization profile options at site and application levels to the `Master Inventory Organization`.

For more information about how iStore uses the IBE: Item Validation Organization profile option to derive its product database, see [Section 7.3.1, "Products Retrieved From a Single Inventory Organization"](#).

Please refer to the *Oracle Marketing Implementation Guide* for more information on how Oracle Marketing uses this profile option.

#### Important: Item Validation Profile Options and the Create Product Button

When integrating with Oracle Marketing's Products screens, if the two item validation organization profile options do not match **at the same levels**, then the **Create Product** button will **not** display in the Site Administration UI's Catalog > Products menu. However, the iStore administrator still will have view and update privileges for products *within the inventory organization* of the IBE: Item Validation Organization profile option at its *lowest-level* setting.

For example, if you set the IBE: Item Validation Organization profile option at the iStore administrator responsibility level, then the Create Product button will be disabled, since it is not possible using out-of-the-box functionality to set the AMS: Item Validation Organization profile option at responsibility level. However, the iStore administrator still will be able to view and update products within the inventory organization specified in the IBE profile option at the responsibility level.

The Create Product button displays under the following conditions:

1. The Oracle Marketing menu changes have been implemented. Refer to [Section 26.4.2, "Step 2 - Modify Oracle iStore Menu"](#).
2. The profile options, IBE: Item Validation Organization and AMS: Item Validation Organization match at the same levels.
3. The profile option, IBE: Use Advanced Product Setup is set to Yes.

### 26.4.3.2 IBE: Use Advanced Product Setup

The profile option, IBE: Use Advanced Product Setup, controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Site Administration UI. To invoke Oracle Marketing's Product pages, set this profile option to Yes at the iStore application level. If set to No, then Oracle iStore's Product Detail pages will be retrieved. This profile is updateable at all levels.

Note that this profile option only controls the Product Detail pages used during product *update* operations.

### 26.4.3.3 AMS: Inventory Item Update Allowed

Set the Oracle Marketing profile option, AMS: Inventory Item Update Allowed, to Yes to allow items created in Oracle Inventory to be updated.

Please refer to the *Oracle Marketing Implementation Guide* for more information on how Oracle Marketing uses this profile option.

### 26.4.3.4 OSO: Debug Messages On

Ensure that the profile option, OSO: Debug Messages On, is set to No at the iStore application level. If set to Yes, messages will appear in the Oracle Marketing-Oracle iStore product integration pages.

For instructions on how to set profile options, see [Section A.2, "How to Set Profile Options"](#). For more information on the Oracle Marketing profile options (AMS) and the Oracle Sales profile options (OSO), please see the respective product implementation documentation.

## 26.4.4 Step 4 - Run Load Categories Concurrent Program

Run the concurrent program to load the Oracle Inventory categories information into the Oracle Marketing database tables. The concurrent program is AMS Load Inventory Categories. This allows the appearance of current product categories data in the Site Administration-Oracle Marketing pages.

Note that you only need to run the concurrent program after you create new categories in Oracle Inventory.

Following are high-level steps:

1. Log in to Oracle Forms with Marketing Manager responsibility.
2. Run the concurrent program, AMS Load Inventory Categories.

For more information, see the *Oracle Marketing Implementation Guide*.

For generic instructions on how to run concurrent programs, see [Section B.12, "Running Concurrent Programs"](#).

### 26.4.5 Step 5 - Recompile the Key Flexfield Segments

In Oracle Applications, key flexfields (KFFs) are customized fields used to enter multi-segment values such as part numbers, account numbers, etc.

You must recompile the key flexfield segments -- only once -- after creating them. If you do not perform this step, part numbers will appear as XXXX in the Products pages.

Following are quick steps to recompile the KFF segments. For more information, see the *Oracle Inventory User's Guide*.

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Application > Flexfield > Key > Segments.
3. Query on:
  - **Application** --- Oracle Inventory
  - **Flex Title** --- System Items (MTL\_SYSTEM\_ITEMS\_B\_KFV)
4. Recompile the key flexfield by selecting the **Compile** button.

For more information on DFFs in iStore, see [Section D.2, "Descriptive Flexfield Support"](#). For general information on DFFs, see the *Oracle Applications Flexfields Guide*.

## 26.5 Products Functionality with Oracle Marketing Integration

Following the successful integration of Oracle iStore and the Oracle Marketing Products module, the **Site Administration** application will reflect the following:

- [Catalog Tab Changes](#)
- [Advanced Tab Changes](#)

### 26.5.1 Catalog Tab Changes

In the Catalog tab of the Site Administration UI --- under the Products subtab's Planning menu (accessible by updating a product) --- the following functionality is available:



- **Create and Maintain Products** --- See [Section 26.6, "Product Creation and Maintenance Overview"](#).
- **Define Product Options/Attributes** --- See [Section 26.6.2.2, "Selecting Product Options/Attributes"](#).
- **Assign Products to Categories** --- See [Section 26.6.2.1, "Assigning Products to Categories"](#).
- **Assign Products to Inventory Organizations** --- See [Section 26.6.2.3, "Assigning Products to Organizations"](#).
- **Assign Prices to Products** --- See [Section 26.6.2.4, "Assigning Products to Price Lists"](#).
- **Create and Maintain Model Bundles** --- See [Section 26.6.2.5, "Maintaining Model Bundles"](#).

## 26.5.2 Advanced Tab Changes

In the **Advanced** tab of the Site Administration UI, the **Product Templates** subtab is available following successful integration. Use this subtab to create new product templates and maintain existing ones. The templates determine the Oracle Inventory options or attributes that are available during product creation.

See [Section 26.6.3, "Creating New Product Templates"](#).

## 26.6 Product Creation and Maintenance Overview

Integration of Oracle Marketing's Product screens allows iStore administrators to define new products and update existing product details from the following Site Administration UI menu paths:

- Catalog > Products (update product)
- Advanced > Product Templates

Products created in the Site Administration UI are immediately stored in the same database tables as products created in Oracle Inventory using Oracle Forms.

For information about the default inventory organization for product creation, see [Section 26.6.1.2, "Organization Where Product is Created"](#). Refer to [Section 26.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option setting recommendations.

Two types of products can be created:

- **Inventory items** --- These include tangible items such as books, clothing, appliances, and computers.
- **Service items** --- Currently, only warranties are supported as a newly created product through the Site Administration application.

Oracle iStore provides a default **inventory** template and a default service template. These can be viewed and their attributes managed in the Advanced > Product Templates menu in the Site Administration UI.

Templates have the following rules:

- Each template must link to an iStore administrator responsibility. By default, the two seeded product templates (one for service, one for inventory) are linked to the seeded iStore administrator responsibility.
- Only one responsibility can map to one template (of type inventory or service). You cannot map more than one responsibility to a single template.

See [Section 26.6.3, "Creating New Product Templates"](#), for more information on creating and working with the product templates.

This section's main topics include:

- [Section 26.6.1, "Product Creation"](#)
- [Section 26.6.2, "Product Maintenance"](#)
- [Section 26.6.3, "Creating New Product Templates"](#)
- [Section 26.6.4, "Product Attributes in Seeded Product Templates"](#)

## 26.6.1 Product Creation

This section contains general information about product creation using the Oracle iStore-Oracle Marketing product screens integration. For complete steps to create and maintain products using the Oracle Marketing product screens, refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

### 26.6.1.1 Create Product Process Flow

Following is the process flow for creating products using Oracle Marketing Products screens in the Oracle iStore Site Administration UI.

1. The iStore administrator logs into the Site Administration UI and navigates to the Catalog > Products pages.

2. Administrator selects the Create Product button in the Products summary screen.

If this button does not appear, see [Section 26.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option recommended settings.

3. In the Create Product screen, the administrator selects either the Product or the Service radio button, depending upon the type of product being created.

Each product type --- Inventory or Service --- has its own seeded template which determines the available attributes or options. Template attributes can be modified in the Advanced > Product Templates screen. See [Section 26.6.3, "Creating New Product Templates"](#), for details.

Information on seeded templates attributes can be found in [Section 26.6.4, "Product Attributes in Seeded Product Templates"](#).

4. In the Create Product screen, the iStore administrator defines the following:

- **Product Name** --- User enters product name. This is a mandatory field.
- **Product Number** --- Users can input the Product Number without entering the key flexfield page, as long as they use the correct separator, and the combination of the segment values is unique and valid.

The page is refreshed when users move to the next field. At this point, an Inventory API validates the product number combination.

- **Key Flexfields** --- For information on using the key flexfield icon (located next to the Product Number textbox), see [Section 26.6.1.4, "Product Number and Key Flexfields"](#), below. This is a mandatory field.
- **Owner** --- The user can update this field by selecting the flashlight icon. The owner must be a CRM Resource. This field is automatically populated based on the resource associated to the iStore administrator user. See [Section 26.4.1, "Step 1 - Set up iStore Administrator as CRM Resource"](#), for more details.
- **Product Type** --- User selects the product type, if desired. This is an optional field. In Oracle Inventory, the Product Type field can be used to further categorize products.
- **Description** --- User enters optional description.
- **Unit of Measure (UOM)** --- UOM is defaulted in Inventory based on the **INV: Default UOM** profile option.

Users can select the flashlight icon to search for and retrieve other UOMs for the inventory organization listed in the Create Product page.

See [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for information about how these fields relate to Oracle Inventory fields/database columns.

5. The administrator selects Apply from the Create Product screen to save the newly created product, and then the Product Detail screen appears.

Note that the administrator can select the Clear button to cancel the product creation, before submitting the changes.

6. After the product is created, the site administrator can update the product through the Catalog > Products screens in the Site Administration UI.

See [Section 26.6.2, "Product Maintenance"](#), for more information.

Update operations include the ability to access previously defined descriptive flexfields. See [Section 26.6.1.5, "System Item Descriptive Flexfields \(DFFs\)"](#), below, for more information.

### 26.6.1.2 Organization Where Product is Created

When you create a product using the Site Administration UI, it is automatically assigned to the inventory organization defined in the profile options, IBE: Item Validation Organization and AMS: Item Validation Organization. See [Section 26.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option setting recommendations.

You must then assign the product to the appropriate sub-organization, if desired. This task can be performed either in the Site Administration UI or in Oracle Forms using Inventory responsibility. See [Section 26.6.2.3, "Assigning Products to Organizations"](#), for more information on assigning products using the Site Administration application.

### 26.6.1.3 Templates Link to iStore Administrator Responsibility

Out-of-the-box, the Inventory and Service templates available with the Oracle Marketing Products integration are both tied to the iStore administrator responsibility. When the site administrator selects the Product or Service radio button in the Create Product page, the template assigned to the user's responsibility is automatically applied when the product is saved, and controls the Inventory attributes available.

26.6.1.4 Product Number and Key Flexfields

The Key Flexfield (KFF) icon is displayed beside the Product Number field.

Users press the icon, and the Select Product Number Segments page displays, with textboxes to enter the Product Number Segments defined in the key flexfield setup in Oracle Inventory. In this page, the user must enter the segments defined in the KFF.

The figure below, [Figure 26–1, "Select Product Number Segments Page"](#), shows an example of the Select Product Number Segments page.

Figure 26–1 Select Product Number Segments Page

Select Product Number Segments

Product Number Segment	Value	Description
*Item	<input type="text"/>	
Product Line	<input type="text"/>	

\* Indicates a required field.

Update

Restore

The values shown in the Product Number Segment textboxes depend on the KFF setup in Inventory. For example, if you have set up your KFF to be a list of values (LOV), then the KFF for the Product Number Segments textbox will be an LOV.

For more information on KFFs, see the *Oracle Inventory User Guide* and the *Oracle Applications Flexfields Guide*.

To continue with the product creation, the user enters the mandatory information in the textbox(es) and selects the Update button.

26.6.1.5 System Item Descriptive Flexfields (DFFs)

In Oracle Applications, system item descriptive flexfields (DFFs) are customized fields for entering additional information for which your Oracle Applications product has not already provided a field. For more information, see the *Oracle Applications User's Guide*.

If a DFF has been set up through Oracle Inventory, the additional attributes are displayed in the Product Detail page, where the user can complete the product definition with required and optional attributes.

Due to Oracle Marketing framework limitations, DFFs are displayed only in the Product Detail page -- not in the Create Product page -- thus, the site administrator must first create the product before accessing the DFFs.

In the Product Detail page, the following display options can be rendered using DFFs:

- Drop-down menus with predefined lists of values
- Text input fields with no format condition and no defaults
- Text input fields with no format condition and default values
- Text input fields with format conditions
- Text input field with search icon for LOVs that have more than 50 values
- Date fields
- Drop-down menus with values that depend on previous selection

Label definitions and LOV validations must be rendered according to the DFF setup in Inventory. If the DFF is not enabled, the DFF is not displayed in the page.

For more information, see the *Oracle Applications User's Guide* and the *Oracle Applications Flexfields Guide*.

## 26.6.2 Product Maintenance

This section contains general information about product maintenance using the Oracle iStore-Oracle Marketing product screens integration. For complete information on maintaining products using the Oracle Marketing product screens, refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

Following is the process flow for updating products using Oracle Marketing product screens in the Site Administration UI.

1. The iStore administrator selects a product from the Products summary page, and then selects the Update button.
2. In the Product Detail page, the administrator can update or view the following information about the product:

- **Product Name** --- The user can update this field by entering new information into the textbox.
- **Product Number** --- This field is read-only during update.
- **Owner** --- The user can update this field by selecting the flashlight icon. The owner must be a CRM Resource. This field is automatically populated based on the resource associated to the iStore administrator user. See [Section 26.4.1, "Step 1 - Set up iStore Administrator as CRM Resource"](#), for more details.

**Note:** Products that existed in iStore before the integration with Oracle Marketing's product screens will **not** display this field.

- **Status** --- The user can select this LOV to update product status.
- **Inventory Organization** --- This field is read-only and indicates the inventory organization defined in the profile option, IBE: Item Validation Organization (at its lowest level).
- **Unit of Measure (UOM)** --- This field is read-only.
- **Product Type** --- The user can update this field by selecting from the LOV.
- **Creation Date** --- This field is read-only, and shows the creation date of the product in Inventory.
- **Description** --- The user can update this field by entering new information into the textbox.

See [Section 7.3.5, "How Oracle iStore Product Fields Map to Oracle Inventory Fields"](#), for information about how these fields relate to Oracle Inventory fields/database columns.

### 26.6.2.1 Assigning Products to Categories

iStore administrators use the Product Detail: Category Assignment page to assign products to Inventory categories within the default category set. For more information about how the default category set for Oracle iStore is determined, see [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#).

To retrieve the Category Assignment page, select a product from the Products summary page and then select the Update button. From the Planning menu, select the Categories link.

**Note:** In the Category Assignment page, you must first remove a category and then add the replacement category in order to change the category assignment for a product.

### **26.6.2.2 Selecting Product Options/Attributes**

When the iStore administrator initially creates a product in the Site Administration pages, the appropriate template is automatically applied. The options (attributes), however, can be changed through the Product Detail: Inventory Options page.

To retrieve this page, select a product from the Products summary page and then select the Update button. From the Planning menu, select the Inventory Options link.

See [Section 26.6.4, "Product Attributes in Seeded Product Templates"](#), for the list of attributes defined by default in each seeded template.

### **26.6.2.3 Assigning Products to Organizations**

When the iStore administrator initially creates a product in the Site Administration UI, it is placed into the inventory organization defined in the profile option, IBE: Item Validation Organization. See [Section 26.4.3.1, "AMS: Item Validation Organization and IBE: Item Validation Organization"](#), for profile option setting recommendations.

If you want the product to be available to sub-organizations under this inventory organization, you can move it to the appropriate inventory organization, using the Product Detail: Organization Assignments page.

To retrieve the Product Detail: Organizations page, select a product from the Products summary page and then select the Update button. From the Planning menu, select the Organization Assignments link. Note that you also can select UOMs in this page.

### **26.6.2.4 Assigning Products to Price Lists**

When the iStore administrator initially creates a product in the Site Administration UI, it is not included in any price list. Therefore, you may wish to place it on a price list using the Product Detail: Price Lists page.

To retrieve this page, select a product from the Products summary page and then select the Update button. From the Planning menu, select the Price List link.

In the Price Lists page, you can assign a product to a previously created price list assigned to the appropriate inventory organization. See [Section 26.6.1, "Product](#)



[Creation](#)", and [Section 26.6.2.3, "Assigning Products to Organizations"](#), for more information.

The Price Lists page includes the following fields or columns:

- **Name** --- This column shows the price list name. To select a price list, the administrator can select the flashlight icon to retrieve an LOV of price lists from within the inventory organization specified at the top of the screen.
- **Currency** --- This column shows the default currency for the price list.
- **Price** --- This textbox allows the user to enter a price for the product into the price list. Use the format recommended in the *Oracle Order Management Suite Implementation Manual*, Pricing chapter.
- **UOM** --- The user can set the unit of measure by selecting the flashlight icon.
- **Static Formula** --- The user can select a static formula by selecting the flashlight icon.
- **Dynamic Formula** --- The user can select a dynamic formula by selecting the flashlight icon.
- **Effective Dates** --- Using the calendar icons in the Start Date and End Date columns, the user can enter the effective dates that the product will be available on the price list.

More information on pricing can be found in [Chapter 10, "Implementing Pricing"](#), and the *Oracle Order Management Suite Implementation Manual*, Pricing chapter.

### 26.6.2.5 Maintaining Model Bundles

Using the Product Detail: Bundling page, users can create and maintain model bundles (requiring Oracle Bills of Material integration) defining the following:

- Item sequence
- Item
- Quantity

**Note:** In the Oracle iStore Customer UI, only standard model bundles with mandatory option classes are supported. For more information, see [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#).

To retrieve this page, select a product from the product summary page and then select the Update button. From the Planning menu, select the Bundling link.

For more information on creating bills of material, see the *Oracle Bills of Material Implementation Guide*.

## 26.6.3 Creating New Product Templates

The site administrator can use the Product Templates subtab in the Site Administration UI's Advanced tab to create custom product templates. Each template links to a responsibility, and for each responsibility you may create only one Product and one Service template.

To create and enable a new template, do the following:

- [Create a New Responsibility for the iStore Administrator](#)
- [Link the Responsibility to the iStore-Marketing Menus](#)
- [Create a New Product or Service Template](#)
- [Set up the New Template](#)

### 26.6.3.1 Create a New Responsibility for the iStore Administrator

In Oracle Forms, create a new responsibility, or copy the seeded iStore Administrator responsibility.

See the *Oracle Application's System Administrator's Guide* for information on creating new responsibilities.

### 26.6.3.2 Link the Responsibility to the iStore-Marketing Menus

Link the new responsibility to the menu, using the following steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Security > Responsibility > Define.
3. Query for the new responsibility.
4. Associate the `iStore Merchant Root` menu with the new responsibility.

### 26.6.3.3 Create a New Product or Service Template

Create a new template, using the following procedure:

1. Log in to the Site Administration UI and navigate to Advanced > Product Templates. The Product Templates page displays.
2. Select the Create Product Template button.

3. In the Create Product Template screen, enter the following:
  - **Template Name** --- Enter a unique, descriptive name for the template.
  - **Type of template** --- Select the radio button for either a **Product** or **Service** template.
  - **Description** --- Optionally, enter a description for the template in the **Description** field.
4. Select Apply to save the changes. A confirmation message is displayed.

#### 26.6.3.4 Set up the New Template

Set up the new template, as follows:

1. Log in to the Site Administration UI and navigate to Advanced > Product Templates. The Product Templates page displays.
2. Select the hyperlink of the new template in the Product Templates screen.
3. In the Responsibilities block, select the flashlight icon to retrieve the iStore responsibility which will link to the template. Only one product template and one service template can be assigned to a responsibility.

Optionally, remove an assignment.

4. In the Attributes block, set the following parameters for each attribute.
  - **Default** --- Select this to make an attribute part of the template by default.
  - **Editable** --- Select this to make an attribute updateable in the product screens. This field overrides the Hide field. If you select Editable, Hide is ignored.
  - **Hide** --- Select this to make the attribute hidden in the product screens. This is overridden by a selected Editable parameter.

See [Section 26.6.4, "Product Attributes in Seeded Product Templates"](#), for the list of attributes defined by default in each seeded template.

See the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide* for more information on product templates.

## 26.6.4 Product Attributes in Seeded Product Templates

Different Inventory attributes can be assigned to a product, depending upon the type of product created -- Inventory or Service. If an Inventory product has been created, the attributes screen will display the specific Inventory and Order

Management attributes; if the Service option has been selected, the specific Service default attributes will be displayed. The tables in this section list the seeded attributes for each of the two seeded iStore product templates:

- **Product (Inventory) Template** --- See [Section 26.6.4.1, "Oracle iStore Product Template Attributes"](#).
- **Service Template** --- See [Section 26.6.4.2, "Oracle iStore Service Template Attributes"](#).

**26.6.4.1 Oracle iStore Product Template Attributes**

The following table, [Table 26–1, "Oracle iStore Product Template Attributes"](#), shows the attributes for the seeded Product template.

**Table 26–1 Oracle iStore Product Template Attributes**

Attributes	Default	Editable	Hide
<b>Inventory Attributes</b>			
Inventory Item	Yes	Yes	No
Stockable	Yes	Yes	No
Transactable	Yes	Yes	No
Revision Control	Yes	Yes	No
<b>Bill of Material Attributes</b>			
BOM Allowed	No	Yes	No
BOM Item Type	Standard	Yes	No
Pick Components	No	Yes	No
<b>Costing Attributes</b>			
Cost Enabled	Yes	Yes	No
<b>Physical Attributes</b>			
Collateral Item	No	No	No
Electronic Format	No	No	Yes
Downloadable	No	No	Yes
OM Indivisible	Yes	Yes	No
Unit Weight	Null	Yes	No
Weight UOM	Null	Yes	No

**Table 26–1 Oracle iStore Product Template Attributes (Cont.)**

Attributes	Default	Editable	Hide
<b>Order Management Attributes</b>			
Customer Orderable	Yes	Yes	No
Customer Order Enabled	Yes	Yes	No
Internal Orderable	Yes	Yes	No
Shippable	Yes	Yes	No
Returnable	Yes	Yes	No
Activation Required	No	No	Yes
Assemble to Order	No	Yes	No
<b>Invoicing Attributes</b>			
Invoiceable	Yes	Yes	No
Invoice Enabled	Yes	Yes	No
<b>Service Attributes</b>			
Serviceable	No	Yes	No
Defect Tracking	No	Yes	No
Install Base	No	Yes	No
Subscription Dependency Enabled	No	No	Yes
Billing Type	Null	Yes	No

See the *Oracle Inventory User's Guide* for more information on the meaning of these attributes.

#### 26.6.4.2 Oracle iStore Service Template Attributes

The following table, [Table 26–2, "Oracle iStore Service Template Attributes"](#), shows the attributes which are included in the seeded Service template.

**Table 26–2 Oracle iStore Service Template Attributes**

Attributes	Default	Editable	Hide
<b>Costing Attributes</b>			
Cost Enabled	Yes	Yes	

**Table 26–2 Oracle iStore Service Template Attributes (Cont.)**

<b>Attributes</b>	<b>Default</b>	<b>Editable</b>	<b>Hide</b>
<b>Physical Attributes</b>			
Collateral Item	No	No	Yes
Electronic Format	No	No	Yes
Downloadable	No	No	Yes
OM Indivisible	No	No	No
Unit Weight	No	No	Yes
Weight UOM	No	No	Yes
<b>Order Management Attributes</b>			
Customer Orderable	Yes	Yes	No
Customer Order Enabled	Yes	Yes	No
Internal Orderable	Yes	Yes	No
Activation Required	No	No	Yes
Assemble to Order	No	Yes	No
<b>Invoicing Attributes</b>			
Invoiceable	Yes	Yes	No
Invoice Enabled	Yes	Yes	No
<b>Service Attributes</b>			
Defect Tracking	No	Yes	No
Support Service	Null	Yes	No
Coverage Template	Null	Yes	No
Duration Value	No	Yes	No
Duration Period	No	Yes	No
<b>Web Attributes</b>			
Orderable on the Web	Yes	No	No
Web Status	Yes	Yes	No

See the *Oracle Inventory User's Guide* for more information on the meaning of these attributes.

## 26.7 Using Oracle Marketing to Provide Content in the Customer UI

The content you define in Oracle Marketing can be displayed in seeded bins in the Customer UI, through the use of Oracle iStore's Display Template functionality.

The out-of-the-box Display Templates that are candidates for marketing postings include:

- Section page bins
- Item page bins
- Shopping cart page bins

Each of these pages has seven left bins, seven right bins, one top bin, and one bottom bin. Each bin is listed as a separate logical Display Template in the Oracle iStore template manager.

See [Section 26.7.1, "High-Level Steps for Creating and Posting Content with Oracle Marketing"](#), below, for steps.

### 26.7.1 High-Level Steps for Creating and Posting Content with Oracle Marketing

Following is a high-level flow for creating and posting materials from Oracle Marketing in Oracle iStore's Customer UI catalog and shopping cart pages.

**Note:** These steps assume you have created at least one site and made it available in the Customer UI.

1. Set the profile option, IBE: Use Web Placements, to Yes to enable eMerchandising postings in the specialty sites. Set this at the application level to iStore, or if integrating with other Oracle E-Business HTML applications, set at site level.
2. **Create Content** --- Creating eMerchandising postings in Oracle Marketing. See the *Oracle Marketing Implementation Guide* for information about setting up Oracle Marketing.
3. **Identify Display Templates** --- Determine which Display Templates will display the content. See [Appendix E, "Display Templates and Media Objects"](#), for a complete list of Display Templates.
4. **Map Display Template to Content** --- Associate the Display Template with the desired content (a JSP file), using the Display Template functionality. See [Section 8.11, "Mapping Source Files to Display Templates"](#), for steps.

5. **View Posting** --- When a user views your specialty site online, the Oracle iStore template that references the posting passes the user's party ID, specialty site, page type (section, item, or shopping cart), and top-level section ID or item ID if applicable, to Oracle Marketing. The Oracle iStore template also passes its bin location. Oracle Marketing's eMerchandising module creates a specialty site posting for the corresponding placement.

See [Chapter 9, "Implementing Content"](#), for more information about how the Customer UI pages are displayed.

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

## 26.8 Using Oracle Marketing for Personalization in the Customer UI

Identifying and targeting profitable customers and prospects with appropriate recommendations is a key challenge facing marketing departments. Up-sell and cross-sell recommendation rules can be defined manually by marketers, based on their experience or on analysis of the customer data. But as the volume (of sales and customers) increases, manual rules are no longer efficient and marketers need to rely on technologies that can:

- Help them discover, record, and analyze customer web browsing and web purchasing behavior
- Push personalized recommendations at the time of the customer web interaction based on the knowledge gained through the previous interactions

With eMerchandising, marketers will be able to select Oracle Personalization as the recommendation strategy option for Product Recommendation Postings. However, even if OP is selected as the strategy, for guest users, **default** content for the posting will be served, and OP will **not** be invoked.

To help companies meet this personalization challenge, Oracle iStore provides integration with the Oracle Personalization (OP) engine through Oracle eMerchandizing. Oracle eMerchandizing is a module within the Oracle Marketing product. OP provides real-time personalized recommendations to customers on the site via Oracle Marketing postings.

This integration allows Oracle iStore to capture the following events during users' visits to your specialty sites and send them to OP:

- Click on an item to view its detail
- Add an item to the shopping cart



- Remove an item from the shopping cart (not used by the OP)

In addition to these events, OP relies on the purchase history (reviewing the Oracle Order Management tables) to make recommendations.

OP will only use these events if a logged in user performed them. If a guest user adds an item to the cart, then OP will not use the event information.

When an event occurs, Oracle iStore calls an eMerchandising event handler that captures the following information:

- Whether the user is anonymous or registered
- Party ID for a registered user
- Unique Cookie ID for an anonymous user
- Item ID

Oracle Marketing's eMerchandising module uses this information to enhance personalization of the customer experience.

### **26.8.0.1 Enabling Customer Event Capture**

No extra setups are required in Oracle iStore in order for Oracle Marketing to provide event capture. See the *Oracle Marketing Implementation Guide* for more information.



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# Integrating Oracle iStore with Oracle Partner Management

This chapter describes the integration of Oracle iStore 11i with Oracle Partner Management.

This chapter's main topics include:

- [Section 27.1, "Overview of Oracle Partner Management"](#)
- [Section 27.2, "Oracle iStore-Oracle Partner Management Integration Overview"](#)

## 27.1 Overview of Oracle Partner Management

Oracle Partner Management is an integrated software solution for managing business partner relationships. It allows management of partner dashboards, partner profiling, and partner enrollments, and allows partner access to opportunities, referrals, deals, and special pricing.

See the *Oracle Partner Management Implementation Guide* for more information. This guide is available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

### 27.1.1 Implementing Oracle Partner Management

Install and set up Oracle Partner Management according to the latest *Oracle Partner Management Implementation Guide*. This guide is available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 27.2 Oracle iStore-Oracle Partner Management Integration Overview

You can integrate Oracle Partner Management with Oracle iStore to provide a partner dashboard in the Oracle iStore Customer UI. Using this dashboard, partners can navigate to Oracle Partner Management pages, potentially drilling down into:

- Sales opportunity summaries
- Trade management offers
- Claims summaries
- Customer information
- Forecast information
- Special offer requests
- Partner program enrollments

Main topics in this section include:

- [Section 27.2.1, "Summary of Site Management Options for Oracle Partner Management"](#)
- [Section 27.2.2, "Partner Home Page"](#)
- [Section 27.2.3, "Setting up a Partner Site - Sample Scenario"](#)
- [Section 27.2.4, "Partner Program Enrollments"](#)
- [Section 27.2.5, "Enabling Sites Navigation Icon"](#)
- [Section 27.2.6, "Enabling the Quick Links Bin"](#)
- [Section 27.2.7, "Enabling the Partners Group Bin"](#)
- [Section 27.2.8, "Oracle iStore Customer UI Access for Oracle Partner Management Users"](#)
- [Section 27.2.9, "Registration for Oracle Partner Management Users"](#)
- [Section 27.2.10, "Customizing Oracle Partner Management User Profile Pages"](#)
- [Section 27.2.11, "Sample Oracle Partner Management User Registration Flows"](#)
- [Section 27.2.12, "Example Business Scenario"](#)

## 27.2.1 Summary of Site Management Options for Oracle Partner Management

This section summarizes the options available when you integrate with Oracle Partner Management. Topics include:

- [Section 27.2.1.1, "Partner Dashboard and Other Customer UI Options"](#)
- [Section 27.2.1.2, "User Access Control and User Management Options"](#)

### 27.2.1.1 Partner Dashboard and Other Customer UI Options

- Set up a Partner Home Page with links to the Oracle Partner Management application --- See [Section 27.2.2, "Partner Home Page"](#), and [Section 27.2.3, "Setting up a Partner Site - Sample Scenario"](#).
- Target content in bins --- For example, set up a bin that allows partners to enroll in specific programs, or a bin that links to other applications. You can map bins to section page locations using Configurable Layout for bins. The Enrollment Left/Right bins typically will be used in the Partner program enrollment page in the Partner site. See the *Oracle Partner Management Implementation Guide* for more information. See [Section 8.10, "Configuring Bin Placement and Content"](#), [Section 27.2.6, "Enabling the Quick Links Bin"](#), [Section E.3, "Seeded Bin Display Templates"](#), and [Section E.19, "Oracle Partner Management Integration Display Templates"](#).
- Map sections to specific templates designed to show your Partner content items --- See [Section 8.5, "Section Templates Overview"](#).
- Implement sites with targeted catalog and pricing information --- See [Section 8.3, "Catalog Overview"](#), and [Section 5.2, "Creating Sites"](#).
- Allow partners to navigate back to the site portal from Oracle Partner Management --- See [Section 27.2.5, "Enabling Sites Navigation Icon"](#).
- Leverage Oracle iStore's globalization features, such as multiple language and currency support --- See [Section 5.1, "Site Management Overview"](#), and [Section 17.2, "Oracle iStore Key Global Features and Benefits"](#).
- Allow partners to enroll in partner program memberships through the Oracle iStore Customer UI --- See [Section 27.2.4, "Partner Program Enrollments"](#).

### 27.2.1.2 User Access Control and User Management Options

- Restrict access to sites based on user responsibility --- See [Section 5.1, "Site Management Overview"](#), and [Section 27.2.8, "Oracle iStore Customer UI Access for Oracle Partner Management Users"](#).

- Support partner user types and registration --- See [Section 27.2.9, "Registration for Oracle Partner Management Users"](#).
- Customize user profile screens specifically for partners --- See [Section 27.2.10, "Customizing Oracle Partner Management User Profile Pages"](#).

## 27.2.2 Partner Home Page

Oracle iStore supports Oracle Partner Management content and links in the post-login Partner Home Page, including:

- **Available Programs** --- Displays the list of programs available for enrollments
- **Renewal-Upgrade** --- Displays the list of programs in which the partner is enrolled; the partner can start the upgrade process or the renewal process if the program requires it
- **Quick Links navigation bin** --- Supports navigation to the Oracle Partner Management application

For information on program enrollments, see the *Oracle Partner Management Implementation Guide*. See also: [Section 27.2.6, "Enabling the Quick Links Bin"](#), [Section 27.2.1, "Summary of Site Management Options for Oracle Partner Management"](#).

## 27.2.3 Setting up a Partner Site - Sample Scenario

Following is a high-level example to set up a partner site. Note that this is a sample scenario only. Your business requirements may dictate other methods of building sites.

1. Ensure that your user registration and approval processes are set up. Start with [Section 27.2.9, "Registration for Oracle Partner Management Users"](#).
2. Create a site and assign it to the Partner group. See [Section 5.2, "Creating Sites"](#).
3. Create your section hierarchy, with or without sections for products, depending upon your business requirements. See [Section 8.8.1, "Creating Sections"](#).
4. Name one of the top-level sections, Partners.
5. Create subsections under Partners, for example, Hot Topics and Product News. Note that it is not necessary to create additional sections -- you can set up the hierarchy any way your business requirements mandate.
6. Assign the sections to the site you created in step 1. See [Section 8.8.4, "Assigning Sections to Sites"](#).

7. Assign one of the content-specific section Display Templates to the sections created above. See [Section 8.6, "Section Templates": Multilevel Subsection List with Content](#) and [Section Detail](#). As a best practice, use Multilevel Subsection List with Content for non-Leaf sections, and Section Detail with Leaf sections. For a discussion of section types, see [Section 8.3.3, "Section Types: Featured, Navigational, and Leaf"](#).
8. Map content files to media objects, either using the seeded ones or ones that you create. See [Section 9.3.4, "Assigning Content Items to Media Objects"](#).
9. Map the media objects to content components designed to show section additional information (see [Section 9.2.1.6, "Section Additional Information 1 Through 5"](#)).
10. Map the content components at the section level, using the sections created above. See [Section 8.8.5, "Adding Content to Sections"](#).
11. Set up the Quick Links bin, as described in [Section 27.2.6, "Enabling the Quick Links Bin"](#).
12. Map the Partners group bin as desired. See [Section 27.2.7, "Enabling the Partners Group Bin"](#), for details.

## 27.2.4 Partner Program Enrollments

The Oracle iStore registration framework also supports partner program enrollments. Oracle Partner Management's enrollment functionality provides vendors a convenient process to enroll partners into programs or memberships. Partners can initiate self-service program enrollment within the partner dashboard provided through the partner site implementation.

Once initiated, the partner will be guided through the process of completing an enrollment form, reviewing and signing a contract online, and submitting payment for membership fees. The enrollment form, contract, and payment are elements that may not be necessary depending on the configuration of the process. Vendors can create enrollment forms using the Partner Program Management functionality. The program enrollment process also involves managing features such as:

- Online partner program self-service enrollment
- Automatic update of partner profile attributes
- Online submission of payments for membership fees
- Execution of payment processing
- Online display of program terms and conditions

- Online partner acceptance of program terms and conditions
- Proper approval routing following partner enrollment

The purpose of this project is integrating the partner program enrollment flow with the creation of the partner dashboard through partner site definition.

For more information on partner program enrollments, refer to the Oracle Partner Management documentation.

## 27.2.5 Enabling Sites Navigation Icon

To enable users to navigate back to the Customer UI from Oracle Partner Management through a universal navigation icon called Return to Dashboard, you must link the seeded Site Selection and Site Home page functions to the Oracle Partner Management menu root. After these two functions are mapped to the Oracle Partner Management customer root menu, the navigation icon will appear at the top of the Oracle Partner Management customer pages.

**Important:** If you implement the Sites navigation icon in Oracle Partner Management, you must also use the Oracle iStore site management, login, and user profile pages.

Following is the function data for the Site Selection Page and Site Home Page:

- **Site Selection Page:**
  - Function: IBE\_C\_SITE\_SELECTION
  - User function name: iStore Site Selection Page
  - Type: JSP
  - HTML call: ibeCZzdMinisites.jsp
- **Site Home Page:**
  - Function: IBE\_C\_SITE\_HOME
  - User function name: iStore Site Home Page
  - Type: JSP
  - HTML call: ibeCZzpHome.jsp

For data on the Oracle Partner Management root menu, see the *Oracle Partner Management Implementation Guide*.



## 27.2.6 Enabling the Quick Links Bin

You can enable a Quick Links bin on the Partner dashboard to provide partners with links to Oracle Partner Management features, such as deals, referrals, and opportunities. Out-of-the-box, this bin is mapped to a JSP, but you must create a menu linked to a responsibility to allow users with the responsibility to see the bin.

The bin has the programmatic access name, `STORE_QUICK_LINKS_BIN_IBEWC`, and is mapped by default to the JSP, `ibeCAcdQuickLinkBin.jsp`.

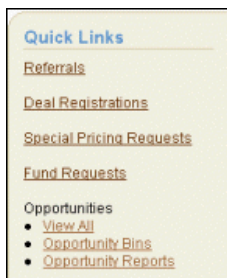
Following are the steps to enable the bin:

1. All the links inside the Quick Links bin are retrieved from Oracle Applications (FND) menus. In Oracle Forms, navigate to Application Developer > Menu.
2. Create the Quick Links menu root. Then create all the menu entries under the quick link menu root (up to two levels allowed). You can use any submenus and functions that are already associated to the menu of the responsibility assigned to the site. Be sure to define prompts for all functions.  
**Important:** Ensure that the menu tree does not have any functions with empty prompts.
3. Save the menu.
4. Attach the Quick Links menu to the responsibility menu, directly under the user menu root (second level).
5. Set the prompt of the Quick Links menu root to empty.
6. Set the value of the profile option, `IBE: Quick Links Menu`, to the Quick Links root menu code. The corresponding responsibility is the one to which the quick links menu is assigned; thus, the value of the profile option should be the specific responsibility associated to the site.

All links inside the bin will be rendered as relative URLs. Thus, if the container page is non-secure, all the links inside the bin will be non-secure as well, and vice versa.

The figure below, Example Partner Quick Links Bin, shows how the Quick Links bin might look in an implementation.

**Figure 27–1 Example Partner Quick Links Bin**



## 27.2.7 Enabling the Partners Group Bin

Oracle iStore seeds a bin template which displays sites associated to the group, Partners. To display this group, map the logical template, PARTNER\_GROUP\_BIN\_IBEW, to the bin layout component of your choice. See [Section 8.10.5, "Using Configurable Bin Layout"](#), for instructions. See [Section E.3, "Seeded Bin Display Templates"](#), for more information about the bin template.

See also: [Section 8.10.6, "Group Bins"](#)

## 27.2.8 Oracle iStore Customer UI Access for Oracle Partner Management Users

Oracle iStore restricts access to its Customer UI pages by checking users' responsibilities. The responsibilities your specialty sites will support must be associated to specific sites during setup. Oracle iStore supports all Oracle Partner Management responsibilities, both seeded and non-seeded, provided that you map these responsibilities to sites. If a site allows guest user access, in the Site Selection Page, all specialty sites available to the guest user are displayed.

See [Section 5.1, "Site Management Overview"](#), for more information.

For specific information on Oracle Partner Management responsibilities, see the *Oracle Partner Management Implementation Guide*.

## 27.2.9 Registration for Oracle Partner Management Users

During registration, each Oracle Partner Management end-user is assigned at least one responsibility through an association with his username. As with other Customer UI users, initial registration of Oracle Partner Management users should be done through Oracle iStore. Setup and support of enrollments, approval

processes, and user types is handled through the Oracle CRM Technology Foundation HTML pages.

**Important:** Registration through Oracle CRM E-Business Suite HTML login (JTF login) is not recommended. User types supported in Oracle iStore are not supported in JTF/JTA, since they are associated to Oracle iStore registration templates. If you register using JTF/JTA user types, users will not have access to the Site Selection Page and the partner sites.

### 27.2.9.1 Enable Partner Management User Types

Before allowing users to register through Oracle iStore, the registration page should be implemented to support Oracle Partner Management users. After it is set up to support Oracle Partner Management users, the page will display registration links for Oracle Partner Management users.

Follow the steps below to set up the registration page for Oracle Partner Management users:

1. Log in to the Oracle CRM System Administration Console.
2. Set the desired Oracle Partner Management user types as active. The Oracle Partner Management registration links will automatically be available in the New User Registration page.

See [Section 13.6.1, "User Type Registration Selections"](#), for details about the links that display in the seeded registration page.

Note that these steps also enable the partner user types for e-mail notifications.

See the *Oracle Common Application Components Implementation Guide* user management section and the *Oracle Applications CRM System Administrator's Guide* for more information on using user management functionality through the System Administration Console.

See the *Oracle Partner Management Implementation Guide* for more information on Oracle Partner Management seeded user registration data.

**Note:** The seeded Oracle Partner Management enrollments are enabled by default. See the Oracle Partner Management documentation and the *Oracle Applications CRM System Administrator's Guide* for more information.

See also:

- [Section 13.2, "User Registration Overview"](#)
- [Section 13.6, "Registering Using Oracle iStore"](#)

- [Section 13.3, "User Management Integration with Other Oracle Applications"](#)
- [Section 13.6, "Registering Using Oracle iStore"](#)
- [Section 27.2.4, "Partner Program Enrollments"](#)

## 27.2.10 Customizing Oracle Partner Management User Profile Pages

Out-of-box, all of the user and company profile pages will display the seeded Oracle iStore profile menus. To enable the Oracle Partner Management profile menus, follow the steps in [Section 13.8.3.3, "Steps to Configure Profile Menus"](#).

## 27.2.11 Sample Oracle Partner Management User Registration Flows

This section contains example user registration flows for Oracle Partner Management users. Sections include:

- [Section 27.2.11.1, "Partner User Registration"](#)
- [Section 27.2.11.2, "Registration in Oracle Partner Management Implementation"](#)

### 27.2.11.1 Partner User Registration

Following is the registration flow for Oracle Partner Management users, both primary and non-primary. As a prerequisite, Partner User Type is defined in Oracle CRM Technology Foundation User Management framework.

**Note:** For the partner primary user registration flow, the impact on Oracle TCA storage is as follows:

- The organization is defined as party ID of type "organization"
  - The organization address is saved as "party address"
  - The user is defined as party relationship of "employee of" the partner organization
  - The user is defined based on the relationship "partner of" an internal organization
1. User chooses to register as a user for a partner organization. Primary and regular partner users select different links -- see [Section 13.6.1, "User Type Registration Selections"](#), for link details.
  2. The following information is displayed in the seeded registration page:
    - Organization Information: organization name, address and primary phone number

- Personal Information: name, e-mail address, primary phone number and username and password
- The user indicates default currency and country
- Primary users select a partner type (previously defined in the Partner Management schema); note that partner type selection is not available for non-primary users

3. The user submits the registration.

4. The user receives an e-mail notification with username, password and organization identifier number.

At the submission level, the information is saved in the Partner Management, TCA and FND schema. A party relationship of "partner of" between the new party organization and the internal organization is also created. The user is also created as a resource and assigned to a resource group. The partner is also assigned to a profile, that will be populated with information when the partner will apply for a partner program

5. Once the partner has completed the registration, an approval process can be launched if required.

6. If the partner is auto-approved, the following target pages are displayed, based on the starting point of the registration:

- Site Selection Page
- Site Home Page
- Checkout screen

7. If the partner is not auto-approved, the pending approval page is displayed.

8. During approval, the user is assigned a default responsibility based on the user type setup.

**Note:** Until the primary user has approved and assigned him roles and responsibilities, the non-primary user is not assigned to all responsibilities associated to the partner organization.

When the primary user approves the non-primary user, responsibilities need to be assigned and the partner profile needs to be populated.

9. Once the user has been approved and has access to the site dashboard, he can apply for a partner program:

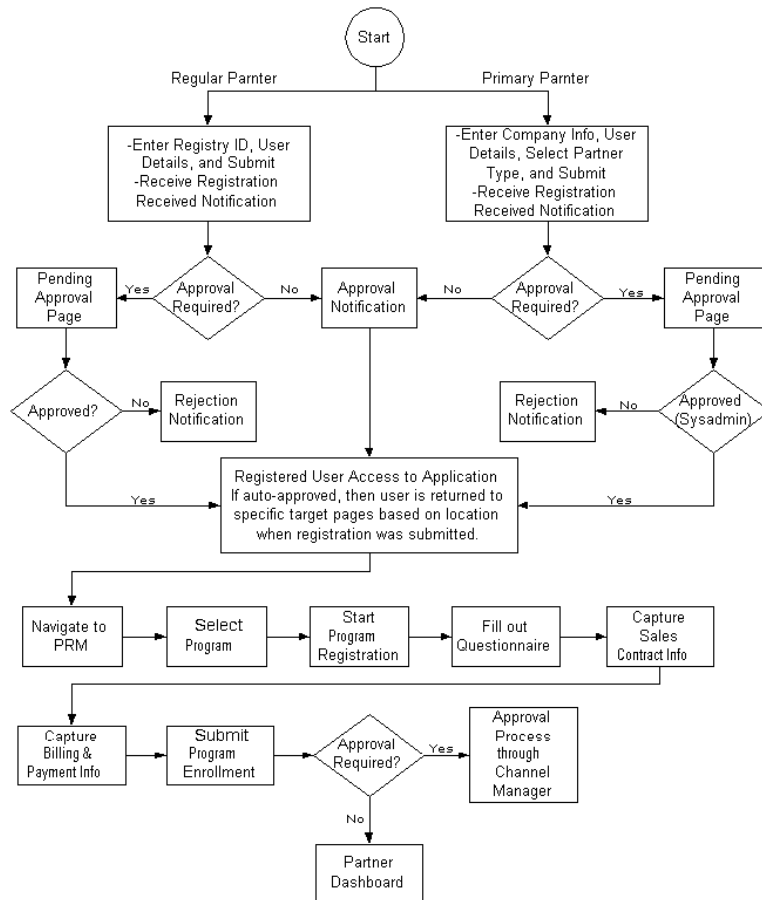
- If implemented, the list of available partner programs will be displayed in the partner Program Enrollment bin. Note that a program is an orderable item, associated with a default inventory organization.
- The primary user selects one of the programs and starts the application.
- Based on the program setup, the following steps can be implemented:
  - The user can be required to complete a questionnaire, defined in Oracle Partner Management. The results of the questionnaire are saved in the Partner Profile. If a user applies for another program and gives different answers to the questionnaire, the new answers overwrite the previous ones.
  - The user can accept a sales contract.
  - The user can enter billing information (in this case, an account is created in Oracle TCA).
  - The user can enter payment information
- The user submits the program application.
- An order is generated in order management in Entered status, associated to the operating unit mapped to the partner site responsibility.
- The partner is directed to the partner dashboard and a message is displayed, saying that the program application needs to be approved.
- The Vendor/Channel Manager approves or rejects the application. When the partner program application is approved, then the order is booked. If the partner program application is rejected, then the order is canceled.
- Once the program application is approved, the partner program membership status is changed.

**Note:** Partner Management users can navigate to Profile > My Company Profile > Membership to check the status of membership.

10. Based on the program benefits setup, the partner company is associated to additional privileges. Primary users might be assigned to specific Oracle iStore and Oracle iSupport responsibilities. Based on the partner dashboard setup, if the merchant has set up group navigations bin for Store and Support sites, the sites associated to these responsibilities will show up in the group bins. Also, based on the responsibility associated to the site and the responsibility associated to the user, the Quick Links bin will display links to Partner Management functionality.

The following diagram, [Figure 27-2, "Partner User Registration Flow"](#), depicts the flow.

**Figure 27-2 Partner User Registration Flow**



### 27.2.11.2 Registration in Oracle Partner Management Implementation

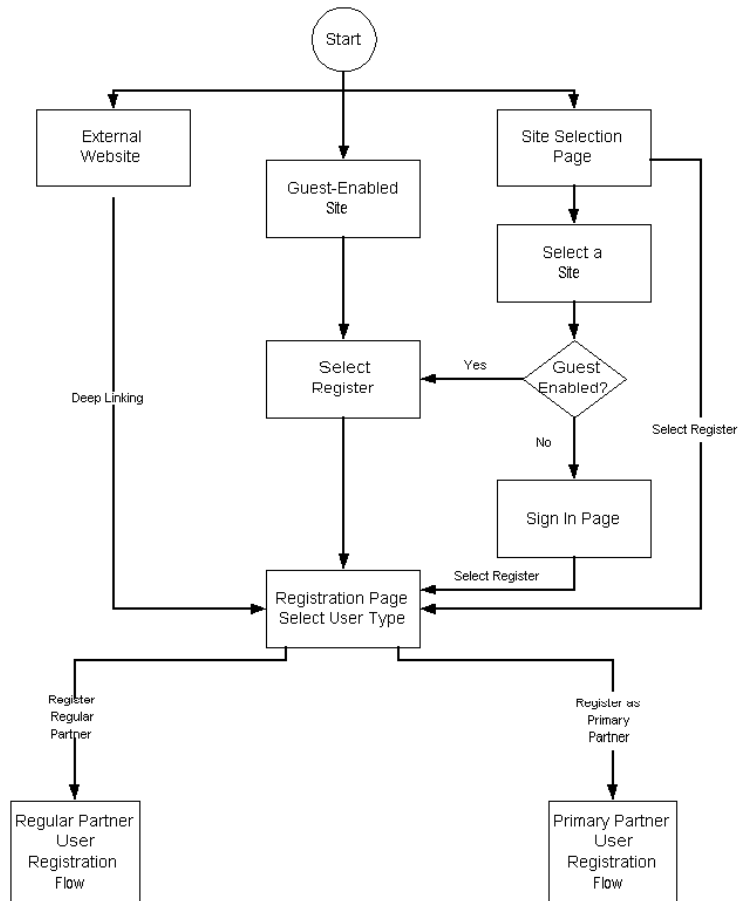
Following is the registration flow in an implementation of Oracle Partner Management using Oracle iStore framework.

1. The user arrives at the registration page through one of the following paths:

- From an external website, the user selects a deep link to the registration page.
  - The user navigates to the Site Selection Page and selects a site. If the site allows guest users, he is taken to the Site Home Page and can select the Register icon. If the site does not allow guest users, he is taken to the login page, and from there can select the Register icon.
  - The user navigates to the Site Selection Page and selects the Register icon.
  - The user accesses a site which allows guest users and selects the Register icon.
2. From the Registration page, if he is registering as a primary user, he follows the partner primary user registration flow; if he is registering as a non-primary user, he follows the partner non-primary user registration flow.

The following diagram, [Figure 27-3, "Registration in Oracle Partner Management Implementation"](#), depicts the flow.



**Figure 27–3 Registration in Oracle Partner Management Implementation**

### 27.2.12 Example Business Scenario

The following sample business scenario with Oracle iStore and Oracle Partner Management implemented together, can enhance your understanding of the site management capabilities. See the following topics:

- [Section 27.2.12.1, "Sample Scenario 1 - Oracle iStore and Oracle Partner Management Implemented in Same Site"](#)
- [Section 27.2.12.2, "Sample Scenario 2 - Partner Sites and Multiple Partner Sites"](#)

***Prerequisite:*** Activate the appropriate Oracle Partner Management enrollment(s) within the desired Oracle iStore user type. When the user selects the enrollment during registration, he will receive both responsibilities, and will have primary user access in both applications. See [Chapter 13, "Implementing User Management"](#), and the *Oracle Applications CRM System Administrator's Guide* for more information on how to set up enrollments.

### **27.2.12.1 Sample Scenario 1 - Oracle iStore and Oracle Partner Management Implemented in Same Site**

In this sample scenario, Oracle iStore and Oracle Partner Management share site access.

#### **Sample User Type/Enrollments Setup**

For the scenarios below, the following is the user enrollment setup:

Partner Primary User:

- Enrollment1: Responsibility A
- Enrollment2: Responsibility C

Partner Business User:

- Enrollment1: Responsibility B
- Enrollment2: Responsibility D

#### **Sample Sites Setup**

Sample sites defined are Site 1, Reseller Site, and Site 2, Distributors Site. Each site supports two responsibilities. Neither site support guest users, and both sites are responsibility-restricted.

##### **Site 1 - Resellers**

This site does not allow guest user access and checks responsibility before allowing access to the site. It is identified with the following responsibilities:

- Responsibility A = Oracle iStore and Oracle Partner Management primary users
- Responsibility B = Oracle iStore and Oracle Partner Management business users

##### **Site 2 -- Distributors**

This site does not allow guest user access and checks responsibility before allowing access to the site. It is identified with the following responsibilities:

- Responsibility C = Oracle iStore and Oracle Partner Management primary users
- Responsibility D = Oracle iStore and Oracle Partner Management business users

### **Access Scenarios Related to Sample Enrollments and Groups**

Use the sample user type/enrollment and sites setups in the following cases:

#### **Case 1: Login/Register as Primary User**

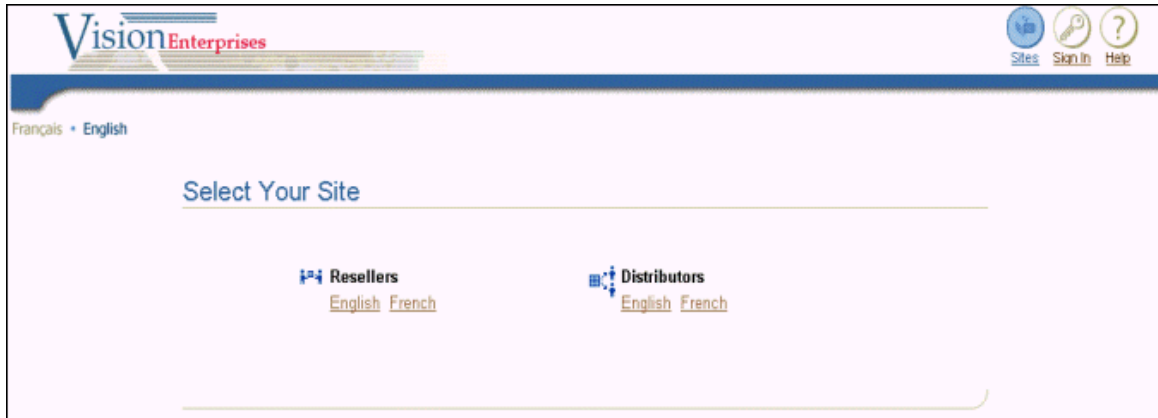
1. The partner primary user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the primary users (responsibilities A and C).
3. The partner drills down into Resellers Site. The Partner Home Page is displayed.
4. The Products tab displays the catalog. The partner can browse the catalog and place orders.
5. The Partner Home Page also displays a bin that shows all sites belonging to the Partner group, a bin that allows partners to enroll in new memberships, a bin that allows partners to navigate to opportunities, deals and referrals, and a bin that allows partners to upgrade/renew programs.
6. The partner navigates to opportunities, then selects the Dashboard link to return to the portal.

#### **Case 2: Login/Register as Business User**

1. The partner business user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the primary users (responsibilities B and D).
3. The partner drills down into Distributors Site. The Partner Home Page is displayed.
4. The Products tab displays the catalog. The partner can browse the catalog and place orders.
5. The Partner Home Page also displays a bin that shows all sites belonging to the North America group, and a bin that allows partners to navigate to opportunities, deals and referrals.
6. The partner navigates to opportunities, then selects the Dashboard link to return to the portal.

The figure below, [Figure 27–4, "Example Site Selection Page: Combined Store and Partner Sites"](#), shows how the Site Selection Page might look in a sample implementation.

**Figure 27–4 Example Site Selection Page: Combined Store and Partner Sites**



The figure below, [Figure 27–5, "Example Partner Dashboard for Partner Primary User"](#), shows how the partner dashboard might look in a sample implementation.

Figure 27–5 Example Partner Dashboard for Partner Primary User

**Vision Enterprises**  
Vision Computers

Cart Orders Profile Sign Out Help

Home Products Support

**Quick Links**

- [Referrals](#)
- [Deal Registrations](#)
- [Special Pricing Requests](#)
- [Fund Requests](#)
- Opportunities**
  - [View All](#)
  - [Opportunity Bins](#)
  - [Opportunity Reports](#)
- Support**
  - [Service Requests](#)
  - [Knowledge Base](#)
- Message Center**
  - [Approvals](#)
  - [FYI](#)

**Upgrades**

- [Reseller UK](#) [Upgrade](#)
- [Technology Reseller](#) [Upgrade](#)

**Product News**

- [Oracle Announces Partner Content Conformance Lab for Oracle iLearning](#), Redwood Shores, Apr. 29, 2003
- [Oracle Unveils New Education Offerings for All Partners](#), Redwood Shores, Apr. 14, 2003
- Michael Dell and Larry Ellison Define the Future of the Data Center [Press release](#), New York, Apr. 2, 2003 and [Webcast](#) New York, Apr. 2, 2003
- [Read more](#) about Dell and Oracle's relationship including what they are doing together, what customers are saying, news, benchmarks, and additional resources
- [Oracle Announces Unbreakable Linux Partner Initiative for ISVs](#), Redwood Shores, Mar. 26, 2003
- [Oracle PartnerNetwork Receives 4 out of 5 Stars in VARBusiness's "2003 Partner Programs Guide"](#), Mar., 2003
- [Dell and Oracle Power Louisiana's State-of-the-Art Justice System in Baton Rouge](#), Redwood Shores, Mar. 24, 2003
- [Oracle Named 2003 CRN Channel Champion](#), Redwood Shores, Mar. 11, 2003

**Hot Topics**

**Sales Tools**

- [Partner Project Registration Form](#)
- [Presentation](#)

**Partner Training**

- [Accreditation Programs](#)
- [Registration for Spring 2003 Accreditation](#)

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- [Network Printers](#) [Accept](#)
- [Desktop Replacement for HQ](#) [Accept](#)

**Available Programs**

- [Reseller US](#) [Enroll](#)
- [System Integrator](#) [Enroll](#)

**Renewals**

- ☐ [Reseller UK](#)
- ☐ [Technology Reseller](#)
- [Renew](#)

### 27.2.12.2 Sample Scenario 2 - Partner Sites and Multiple Partner Sites

In this sample scenario, multiple partner sites are enabled with partner sites.

#### Sample User Type/Enrollments Setup

For the scenarios below, the following is the user enrollment setup:

Partner Primary User:

- Enrollment 1: Partner Primary User

Partner Business User:

- Enrollment 1: Partner Business User

Pre-conditions: The partner primary user registers the partner organization. The primary user is assigned to the Partner Primary user responsibility. The primary user enrolls in a membership that grants him with the "Reseller Primary User"

Responsibility, the "Distributor Primary User" responsibility and the sites responsibilities.

### **Sample Groups and Sites Setup**

In this scenario, two groups are set up, each with two sites.

#### **Group 1 - Partners**

- Site 1 -- Resellers: In this site, no guest user access is allowed. The following responsibilities are associated with the site:
  - Responsibility A = Reseller Primary User
  - Responsibility B = Reseller Non-primary user
- Site 2 -- Distributors: In this site, no guest user access is allowed. The following responsibilities are associated with the site:
  - Responsibility C = Distributor Primary User
  - Responsibility D = Distributor Non-primary user

#### **Group 2 - Stores**

- Site 3 -- USA Store: In this site, no guest user access is allowed. The following responsibility are associated with the site:
  - Responsibility = Vision Computers Indirect USA
- Site 4 -- Canada Store: In this site, no guest user access is allowed. The following responsibility are associated with the site:
  - Responsibility = Vision Computers Indirect Canada

### **Access Scenarios Related to Sample Enrollments and Groups**

Use the sample user type/enrollment and sites setups in the following cases:

#### **Case 1: Login/Register as Primary User**

1. The partner primary user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the primary users (responsibilities A and C).
3. The partner drills down into Resellers Site. The Partner Home Page is displayed.
4. The Partner Home Page also displays a bin that shows all accessible sites belonging to the Stores group, including the targeted sites assigned to this

partner through memberships, a bin that allows the partner to enroll in new memberships, a bin that allows the partner to navigate to opportunities, deals and referrals, and a bin that allows the partner to upgrade/renew programs.

5. The partner navigates to opportunities, then selects the Dashboard link to go back to the portal.
6. The partner navigates to the targeted sites, places orders.
7. The partner selects the Site Selection Page, selects the Partner Group and navigates back to the partner dashboard. As an alternative -- if the merchant has mapped the partner bin to the target Site Home Page -- the user can navigate back to the partner site through the partner group bin.

**Case 2: Login/Register as Business User**

1. The partner business user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the business users (responsibilities B and D).
3. The partner drills down into Resellers Site. The Partner Home Page is displayed.
4. The Partner Home Page also displays a bin that shows all sites belonging to the Partners group and the sites belonging to the Stores group, including the targeted sites assigned to this partner through memberships.
5. The partner navigates to opportunities, then selects Dashboard to go back to the portal.
6. The partner navigates to the targeted sites, places orders.
7. The partner selects the Partner site link in the Group sites bin to go back to the partner Dashboard.





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# Integrating Oracle iStore with Oracle Quoting

This chapter describes the integration of Oracle iStore 11i with Oracle Quoting.

Main topics in this chapter include:

- [Section 28.1, "Overview of Oracle Quoting"](#)
- [Section 28.2, "Oracle iStore-Oracle Quoting Integration Overview"](#)
- [Section 28.3, "Quote Publishing"](#)

## 28.1 Overview of Oracle Quoting

Oracle Quoting enables simple, secure creation and management of customer quotes across all sales and interaction channels. Organizations can propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle.

Users can create quotes using modifiable templates, add and configure complex products, and perform real-time global availability checks. Users can accept product trade-ins, assign sales credits, and manually adjust prices. Quoting integration with Oracle Sales Contracts allows users to negotiate a quote with a sales contract.

Oracle Quoting is available with an HTML and a Forms user interface. Oracle Quoting-HTML is integrated with Oracle Sales Online and Oracle Quoting-Forms with Oracle TeleSales.

### 28.1.1 Setting up Oracle Quoting

Set up Oracle Quoting according to the latest version of the *Oracle Quoting Implementation Guide* available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

**Note:** Oracle iStore uses Oracle Order Capture APIs to integrate with Oracle Order Management and Oracle Receivables. See the *Oracle Order Capture API Guide* for complete details.

## 28.2 Oracle iStore-Oracle Quoting Integration Overview

You can integrate Oracle iStore with Oracle Quoting to allow:

- **Sales assistance requests** --- See [Section 14.2, "Sales Assistance"](#)
- **Terms and Conditions** --- See [Chapter 30, "Integrating Oracle iStore with Oracle Sales Contracts"](#)
- **Published quotes** --- See [Section 28.3, "Quote Publishing"](#)
- **Quote sharing** --- See [Section 12.3.9, "Quote Sharing"](#)

## 28.3 Quote Publishing

Sales representatives can create quotes in Oracle Quoting and publish them to Oracle iStore specialty sites. Oracle iStore customers can then view, alter (if this functionality is enabled), and place the quotes as orders.

**Note:** There are two columns in the My Quotes tab that display important information for the user:

- **Updateable** --- In order for this column to display, the profile option, IBE: Allow Update for Draft Quotes, is Yes (see [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#)). Whether this column displays a Yes or No value depends upon the quote status and the user role. If this column displays a Yes value, it means the quote is in an updateable status (i.e., Draft status).
- **Orderable** --- If this column displays Yes, it means that quote is in a status that allows to the user to place the quote as an order -- i.e., there must be an available quote status transition from the current quote status to Order Submitted.

In both cases, the value of the columns is based on the status of the cart/quote and the permissions of the user (his role on the quote as well as which permission he has).

Main topics in this section include:

- [Section 28.3.1, "Conditions for Publishing a Quote"](#)
- [Section 28.3.2, "API-Level Validation of Site Settings"](#)

- [Section 28.3.3, "Web Published Quotes Business Flow"](#)
- [Section 28.3.4, "Setting Web Publish Profile Options"](#)
- [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#)

### 28.3.1 Conditions for Publishing a Quote

To publish a quote all of the following conditions must be met:

- Quotes can be published to any specialty site. However, the user to whom the quote is published must be able to access the specialty site where the quote is published. See [Section 5.1.1, "Site Concepts"](#), for more information.
- The quote is in a status that allows updating by the sales representative.
- The quote to be published is in the highest version.
- The quote is not in Ordered or Inactive status. In order for a customer to view the quote, the quote must be in Published status.
- The quote is not expired.
- The quote has a quote name.
- A specialty site exists to which the quote can be published and the iStore user who will view the quote has the appropriate responsibility to access the site.
- Only customers who are registered (and thus in the FND\_USER table) can view published quotes in Oracle iStore. If the customer is an individual (B2C) user, the quote is published to the customer. If the customer is an organization (B2B user), the quote is published to the customer contact. There must be a customer contact for an organization, or the quote cannot be published.
- If the customer or customer contact is not an FND\_USER, the required username field on the Oracle Quoting Publish page will be blank. The username input by the sales representative and the system generated password are e-mailed to the customer or customer contact by the Quoting application.
- The payment type and shipping method must be valid for the site where the quote is being published. See [Section 28.3.2, "API-Level Validation of Site Settings"](#).

**Note:** If any of these conditions are missing, the quote will not be visible to the customer, although the published flag in Quoting will indicate publication. See the Oracle Quoting documentation for more information.

## 28.3.2 API-Level Validation of Site Settings

Before a sales representative is allowed to complete the publishing of a quote to a specialty site, Oracle Quoting calls an Oracle iStore API which validates whether the following is enabled in the site where the quote is being published:

- **Shipping method** -- The quote's shipping method must be valid for the target site.
- **Payment type** -- The quote's payment method must be valid for the target site.
- **Payment threshold** -- If Payment Threshold functionality has been enabled, then the API checks to be sure that the site contains payment-threshold-allowed payment types (unless the sold-to contact is excluded from the threshold restriction via the permission).

An error message will be returned and the quote will not be published if invalid parameters are found.

## 28.3.3 Web Published Quotes Business Flow

The following is the business flow for Oracle iStore web-published quotes:

1. Sales representative uses Oracle Quoting to Web Publish a quote.  
When requesting publication, the sales representative can select from the known e-mail addresses for the customer or contact, and can enter a new customer e-mail if necessary.
  - See the *Oracle Quoting Implementation Guide* and the *Oracle Quoting User Guide* for more information on sales representative tasks.
2. An Oracle Quoting workflow event sends the customer an e-mail with a direct link to the quote details.
3. In Oracle iStore, the user accesses the quote in the Cart > My Quotes subtab. The customer can also view the quote by using the View Quotes link in Welcome Bin.
4. At any time, the sales representative can make changes to the quote that are visible to the user --- but only as long as the quote is not ordered. If the quote has been approved, the sales representative cannot change anything on the quote -- the quote is read only. The sales representative can unpublish the quote at any time.

5. User reviews the quote. He can check out with the quote only if the quote status allows it. The quote remains accessible to the customer only as long as the quote remains in Publish status.
  - Users also can share quotes, if this functionality is enabled. See [Section 12.3.9, "Quote Sharing"](#), in [Chapter 12, "Implementing Carts and Orders"](#), for more details.
6. From the Review Order Details and Confirm page, the user can:
  - Make payment **type** modifications.
  - Request sales assistance --- See [Section 14.2.1, "Sales Assistance Business Flow"](#), for more information on the Sales Assistance process.
  - Place the quote as an order. Note that B2B users must have the [IBE\\_CHECKOUT](#) permission to view the Checkout button, and the [IBE\\_CREATE\\_ORDER](#) permission to view the Place Order button.
  - Review or reject Terms and Conditions (if implemented). See [Section 30.2, "Using Terms and Conditions"](#), for details. Note that if a sales representative publishes a quote to Oracle iStore with no T&Cs attached, and the customer places an order with the quote, the default contract associated with the site will be attached to the sales order (assuming that there is a default contract associated with the site).
7. For other than payment type changes, the customer must contact the sales representative to modify the web published version of the quote. This can be done using the Request Sales Assistance functionality.
  - **Exception:** If your implementation allows customers to update quotes, then the customer will be able to modify the published quote. For more information, see [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#).
8. From Oracle Quoting, sales representatives can edit, re-publish, un-publish, and inactivate quotes.
9. Sales representatives can also view Oracle iStore carts that have been converted to quotes in Oracle Quoting when customers request sales assistance.
10. Note that when the customer places an order with a published quote the T&Cs attached to the quote get passed to Oracle Order Management. See [Section 30.2, "Using Terms and Conditions"](#), for more information.

## 28.3.4 Setting Web Publish Profile Options

The following profile options impact the Oracle iStore-Oracle Quoting integration.

1. **IBE: iStore Non Secure URL** -- This profile option must be set to enable Web Publishing functionality. It specifies the base URL for the non-secure server (HTTP). If it is not set, you cannot switch between HTTP and HTTPS. If integrating with Oracle 9iAS Web Cache, set to the web cache URL and bounce the server. See [Section A.13, "Caching and SSL Profile Options"](#), for more information on this profile option.

The profile option must have the following syntax:

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

2. **IBE: Use Quote Publishing** -- Enables customer access to quotes from two areas in the Customer UI:
  - Enables the **View Quotes** link in the Welcome Bin on sites' home pages.
  - Enables the **My Quotes** subtab within the Cart button in the Customer UI.

This profile option defaults to No if not set.

3. **ASO: Default Quote Status** --- Set this to Store Draft at the iStore application level.
4. **ASO: Enable Web Publishing** — If set to Yes, quotes can be published to Oracle iStore specialty sites. Note that this should be at the site level or the Oracle Quoting application level.

See the *Oracle Quoting Implementation Guide* for descriptions and explanations of all Oracle Quoting profile options.

## 28.3.5 Allowing Customers to Update Published Quotes

By default, customers are only able to update payment information on a quote published in the Customer UI. To allow site customers to perform most of the normal cart actions with a quote, set the profile option, IBE: Allow Update for Draft Quotes, to Yes at the site level. See [Section A.14.0.122, "IBE: Allow Update for Draft Quotes"](#), for more information.

**Note:** Be sure to bounce the server after making site-level profile changes.

See also: [Section F.9, "Update Quote Process Flow"](#)

### 28.3.5.1 Update Quote Rules and Guidelines

- Only web published quotes in Draft status are candidates for this functionality.
- Customers will be allowed to update a published quote until the sales representative moves the quote into a state other than Draft.
- After the Allow Update for Draft Quotes profile is set to Yes, a new column, entitled "Updateable", will appear in the My Quotes page. This column's value will be either Yes or No, signifying whether the quote is updateable by the customer in its current state. A quote also must be in Draft status for the Updateable column to display a Yes value.
- When a user updates a quote, the Your Shopping Cart page is retrieved; the quote then functions as a shopping cart, and the user can perform all of the usual functions with the cart. He cannot, however, delete the quote.
- **If Approvals are being used in Quoting:** Once the quote has been submitted for approval, the customer must wait until the quote is approved to place the order. After the quote is approved, the web customer can only modify the payment information before placing the order. However, customers can also request sales assistance again. If the sales representative rejects the request, the quote remains in approved status and the customer can still place the order. In this case, the customer should be notified by the sales representative offline. If the sales representative accepts the request, the sales representative will need to place the quote back in Draft status to enable the update by the customer.
- **When asynchronous pricing is enabled:** When the profile option, ASO: Enable Batch Processing, is set to Yes, quotes cannot be updated on a specialty site (even though the quote status is an updateable status, Draft).

In this case, an error message is returned by Quoting: "The previously submitted pricing request has not completed. You may not update the quote until the pricing request has completed or is canceled."

The quote needs to be in a status different than Draft status while the rep updates the quote and the batch process (that returns the price) is over.

To accommodate this conflict, the sales representative needs to place the cart/quote into a status that is read-only for customer while he/she updates the quote. After updating it, the representative can then place the quote back into Draft mode to allow the customer update.





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# Integrating Oracle iStore with Oracle Sales Applications

This chapter details sales Lead Import implementation in Oracle iStore, and contains information on the integration of Oracle iStore 11i with Oracle Sales applications -- including Oracle Sales Online (OSO) and Oracle TeleSales (OTS).

Main topics in this chapter include:

- [Section 29.1, "Oracle Sales Product Suite Overview"](#)
- [Section 29.2, "Oracle iStore Lead Import Functionality Overview"](#)
- [Section 29.3, "Oracle iStore Lead Import Process Flow"](#)
- [Section 29.4, "Setting up Oracle iStore to Generate Leads"](#)
- [Section 29.5, "Setting up Oracle Sales Applications for Lead Import"](#)
- [Section 29.6, "Running the Leads Concurrent Programs"](#)

## 29.1 Oracle Sales Product Suite Overview

Oracle Sales is a family of integrated applications designed to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and specialty sites to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

To learn more about the Oracle Sales family of applications, see the Oracle Sales Online documentation on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 29.2 Oracle iStore Lead Import Functionality Overview

The Lead Import functionality in Oracle iStore can be a valuable marketing tool to help you sell, cross-sell, and up-sell products, as well as track the specialty site behavior of customers and potential customers. Leads are generated for a specific timeframe using the iStore Lead Import Concurrent Program Request Set, which pulls customer data (such as name, address, phone numbers, etc.) from:

- Submitted Oracle iStore orders
- Active shopping carts that have expired in an Oracle iStore specialty site -- so called "abandoned" carts
- Saved shopping carts that have expired in an Oracle iStore specialty site

The concurrent program set populates the lead import data into tables utilized by Oracle Sales Online and Oracle TeleSales. Oracle Sales Online and Oracle TeleSales users then run the Sales Lead Import Program to complete the data-load process.

For more information on Oracle Sales Online and Oracle TeleSales, see the *Oracle Sales Implementation Guide*, available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

### 29.2.1 Oracle iStore Lead Import Benefits

Oracle iStore's Lead Import functionality can provide the following benefits:

- Oracle iStore orders and expired cart data can be imported into Oracle Sales Online and Oracle TeleSales as leads. Sales representatives can access the information in these applications after running the Sales Lead Import Program.
- Contact information and browsing or purchasing habits can be easily captured for customers and potential customers.
- Lead information retrieved includes names, addresses, phone numbers, and e-mail addresses (if available in the customer registration), as well as browsing or purchasing behavior (available through order or cart analysis).
- Customer information collected can be reused for tracking or marketing purposes.
- Sales representatives can make follow-up contact with users who have left carts in specialty sites.
- The lead import concurrent program set allows party exclusion. For example, you can exclude data from your company's internal orders or specific

organizations, simply by entering the party number(s) in the Enter Parameters screen of the concurrent program.

- Specific Oracle E-Business Suite roles or combinations of roles can be excluded from the data capture. For example, you may wish to exclude orders placed by users having the iStore Reseller role or certain B2B user roles. Roles used in Oracle E-Business Suite can be found in each product's administration documentation. Information about Oracle iStore roles can be found in [Chapter 13, "Implementing User Management"](#), and [Section C.5, "Oracle iStore Customer UI Roles and Permissions"](#).

## 29.3 Oracle iStore Lead Import Process Flow

The following is the process flow for Oracle iStore lead import functionality.

1. Oracle iStore Lead Import Concurrent Program Request Set pulls customer data from Oracle iStore orders (via Oracle Order Management tables). The same concurrent program set pulls data from expired (saved and active) carts.
  - When pulling order data, **all orders** --- except those placed by sales representatives --- are pulled from the Order Management tables. The order status is not considered by the concurrent program.
  - Orders placed by sales representatives are not considered for inclusion in the data, since these leads have already been reviewed from a marketing perspective. Quotes published to specialty sites by sales representatives are not included in lead imports, since these are already identified as opportunities.
  - The concurrent program pulls only data from expired carts (active or saved) created by registered users. No unexpired active or saved carts are considered.
  - Two profile options control the number of days that must pass without activity before a cart is considered expired:
    - IBE: Active Cart Expiration Duration (# days)
    - IBE: Saved Cart Expiration Duration (# days)
 See [Section 12.1.18, "Shopping Cart Expiration Values"](#), for more information.
  - If multiple addresses exist for a customer, then the concurrent program selects the first party site address from the list of primary addresses.

- Only data from registered users is considered.
- 2. Oracle iStore Lead Import concurrent program set pushes data into Oracle Sales data tables using Oracle Sales APIs.
  - The following Oracle Sales database tables are populated in this process:  
--AS\_IMPORT\_INTERFACE  
--AS\_IMP\_LINES\_INTERFACE
- 3. Sales representatives in Oracle Sales Online or Oracle TeleSales run the Sales Lead Import Program, after which they can access the leads and market to them, turning them into opportunities.
  - Leads imported through Oracle iStore have the lead names: iStore Cart Lead and iStore Order Lead, making them easy to distinguish from non-iStore leads.
  - Sales representatives can query the leads in OSO and OT using the mandatory Source Code (also called Promotion Code) used when running the concurrent program.

**Note:** If an imported cart line already has a source code associated with it (for example, because it was generated through its visibility on an external website), then the iStore lead import program will *not* overwrite the original source code.
- 4. Sales representatives use Oracle Quoting to change opportunities into quotes.
- 5. Sales representatives can directly create orders from quotes, or they can Web Publish quotes to Oracle iStore, where the customers can then place the orders. See [Section 28.3, "Quote Publishing"](#).

## 29.4 Setting up Oracle iStore to Generate Leads

The following steps must be performed for Oracle iStore to create the leads:

1. Set profile options -- See [Section 29.4.1, "Setting iStore Lead Import Profile Options"](#)
2. Ensure user setup --- See [Section 29.4.2, "Ensure User Setups for iStore Lead Import Concurrent Program Set"](#)
3. Run Lead Import Concurrent Program Request Set -- [Section 29.6.1, "Run iStore Lead Import Concurrent Program Set"](#)

## 29.4.1 Setting iStore Lead Import Profile Options

Set the following profile options at the site or application level for Oracle iStore:

1. **IBE: Order Lead Import Interval (In Days)** and **IBE: Quote Lead Import Interval (In Days)** --- The values of these two profile options (one for orders and one for expired carts) are used to determine the number of days between retrieval of lead data. If no value is set, these default to 1.
  - **Important:** If you are running the iStore Lead Import concurrent program on a schedule (as is recommended), then set these two profile options to values that exactly match the number of days of the concurrent program schedule. For example, if the concurrent program is set to run every 7 days, then set the value of each of these two profile options to 7. This synchronization is important because if the profile options are set to values that do not match the schedule, then the profile options may inappropriately impact the collection data.

See [Section 29.6.1.1, "Best Practice for iStore Lead Import Concurrent Program Set"](#) for more details.
2. **IBE: Email Address For Lead Import Status** --- In this profile option, you specify the e-mail address(es) where the lead import program status notification will be sent.

Use the following format:

```
john.doe@company.com
```

Or if entering more than one e-mail address, separate them with single space, a single comma, or a single comma and then a space, as in the following examples:

```
john.doe@company.com<space>john.doe@company.com
```

```
john.doe@company.com,<space>john.doe@company.com
```

```
john.doe@company.com,john.doe@company.com
```

There is no default value for this profile.

**Note:** If you leave this profile option blank, then no e-mail is sent.

## 29.4.2 Ensure User Setups for iStore Lead Import Concurrent Program Set

Following are the high-level steps which must be followed in order for the user to whom you grant the iStore Concurrent Program Responsibility to run the iStore

Lead Import concurrent program set. Refer to the documentation listed in the section below for detailed instructions.

### Steps

1. Create an employee in Oracle Human Resources Management System (HRMS).
  - a. Make sure that you enter Employee in the Category field.
  - b. Make sure you create a username for the employee.
    - See *Using Oracle HRMS - The Fundamentals* or *Managing People Using Oracle HRMS* for instructions.
2. Enable the user as a resource in Oracle CRM Resource Manager.
  - See *Oracle Common Application Components Implementation Guide*, Resource Manager chapter, for instructions on importing resources.
3. Grant iStore Concurrent Program Responsibility to the user.
  - For instructions, see [Section 4.1.2.2, "Set up Concurrent Program Administrator"](#).

## 29.5 Setting up Oracle Sales Applications for Lead Import

The following steps must be performed for Oracle Sales to capture the leads:

1. Set profile options --- See [Section 29.5.2, "Oracle Sales Profile Options Required for iStore Lead Import"](#)
2. Ensure user setup --- See [Section 29.5.1, "User Requirements for Running Sales Lead Import Program"](#)
3. Run concurrent program --- See [Section 29.6, "Running the Leads Concurrent Programs"](#)

**Note:** This section contains limited information on how to prepare for and run the concurrent program, Sales Lead Import. For complete instructions, please refer to the latest *Oracle Sales Implementation Guide*, available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

### 29.5.1 User Requirements for Running Sales Lead Import Program

Proper setup of users is essential for successful use of the concurrent program.

1. Ensure that the user belongs to a Sales Group.

2. Ensure that the user running the concurrent program has the Oracle Sales Administrator responsibility.

Refer to *Oracle Sales Implementation Guide* for additional information.

## 29.5.2 Oracle Sales Profile Options Required for iStore Lead Import

Set the following Oracle Sales family profile options at site or application levels.

For more information, see the Setting up Lead Management section of the *Oracle Sales Implementation Guide*.

1. **OS: Assign New Lead** --- This profile option is used by Oracle Sales when assigning resources (sales representatives) to the leads. Following is the impact of setting this profile option:
  - a. **If set to No**, no resource will be assigned to the lead and you must run Oracle CRM Foundation Territory Manager concurrent program Assign Territory Access to assign resources to the lead. See *Oracle Common Application Components Implementation Guide* for details on how to run this concurrent program.
  - b. **If set to Yes**, then at runtime the system attempts to auto-assign a resource for the lead in the following order:
    - An appropriate Territory Manager resource is attempted. If not found, then:
    - The value of OS: Default Sales Rep ID is used (see below). If this is null, then:
    - The lead is assigned to the user running the concurrent program, if he belongs to a sales group.
    - If none of the above steps assigns a resource to the leads, then the result will be the same as if you set the profile option to No. Unless you run the concurrent program mentioned in the *If set to No* paragraph above, the leads will have no owner in the Sales applications, but you will still be able to retrieve them by searching for New leads in the Sales applications.

**Caution:** Setting this profile option to Yes can slow performance.

2. **OS: Auto Qualify Lead** --- This profile option turns automatic qualification for sales leads on or off. A setting of Yes causes the application to attempt to qualify a lead each time the lead is updated. A setting of No means the user must

qualify the lead manually by selecting the Qualified checkbox in Oracle Sales Online. Defaults to No if not set. Set this profile option at site level.

3. **OS: Default Decision Timeframe for Leads** --- This profile option is used by the leads qualification process to set a default value in the UI and APIs. If not set, this profile inserts a null value in the database table. The profile option defaults to `Within 1 Week` if not set.
4. **OS: Default Lead Scorecard** --- This required profile option is used by Oracle Sales to rank the sales lead. If not set, the scoring engine will not function. While creating leads, the UI retrieves this value and passes it to the scoring APIs.
5. **OS: Default Vehicle Response Code for Leads** --- This profile option is used by Oracle Sales to specify the default mode for contacting the customer. Default value is `User`. If not set, this profile inserts a null value in the database table.
6. **OS: Default Channel for Leads** --- This required profile option is used to specify the default channel in the UI and APIs. The default value is `Direct`. If not set, then the application inserts a null value and notifies the user of an error.

---

**Note:** All leads created from Oracle iStore are Direct leads in terms of channels in Oracle Sales applications.

---

Refer to *Oracle Sales Implementation Guide* for additional information.

## 29.6 Running the Leads Concurrent Programs

After the required setups are performed, generating leads is a two-step process

1. Run iStore Lead Import Concurrent Program Request Set -- See [Section 29.6.1, "Run iStore Lead Import Concurrent Program Set"](#), and [Section 29.6.2, "iStore Lead Import Concurrent Program Enter Parameters Screen"](#)
2. Run Sales Lead Import Program -- See [Section 29.6.3, "Run Sales Lead Import Concurrent Program"](#)

### 29.6.1 Run iStore Lead Import Concurrent Program Set

To generate the leads, run iStore Lead Import Set. This is a concurrent program set containing two concurrent programs discussed below.



**Important:** See [Section 29.6.1.1, "Best Practice for iStore Lead Import Concurrent Program Set"](#), for best practice information.

The concurrent program request set, iStore Lead Import Set, pulls data into the Oracle Sales database tables, where it can be used by Oracle Sales Online and Oracle TeleSales. The request set contains two concurrent programs:

- **iStore Lead Import Quotes** -- This program imports only **expired** *active* or *saved* shopping **carts**. The number of days before carts expire is controlled by the profile options: IBE: Active Cart Expiration Duration (# days) and IBE: Saved Cart Expiration Duration (# days).
- **iStore Lead Import Orders** --- This program imports only **orders** from Oracle iStore.

**For more information:**

- See the Concurrent Programs Appendix, [Section B.12, "Running Concurrent Programs"](#), for general instructions on how to run concurrent programs.
- Refer to the *Oracle Applications System Administrator's Guide* for information on Oracle Applications concurrent programs.

### 29.6.1.1 Best Practice for iStore Lead Import Concurrent Program Set

This section contains best practice information for running iStore Lead Import Concurrent Program Set to generate leads into Oracle Sales Online and Oracle TeleSales. It is important that you read and understand the instructions in this section.

- See the Concurrent Programs Appendix, [Section B.12, "Running Concurrent Programs"](#), for general instructions on how to run concurrent programs.
- For data entry instructions on the iStore Lead Import Parameters screen -- where the lead import parameters are entered -- see [Section 29.6.2, "iStore Lead Import Concurrent Program Enter Parameters Screen"](#).
- Note that whether or not an end date is set when running the concurrent program set affects the running mode; the request set will run as follows:
  - COMPLETE mode when the end date is given
  - INCREMENTAL mode when the end date is not given

### First Time Running the Concurrent Program Set

It is recommended that the first time you run this request set, you enter a Begin Date for the data collection. Enter an End Date if desired, but the End Date will default to system date if not entered manually.

### Subsequent Running of the Concurrent Program Set

After you have run the request set for the first time, it is **strongly recommended that you:**

- Set the concurrent program set to run on a **schedule**, such as every week, bi-weekly, or every month.
- Set the following profile options to **exactly match** the **number of days** in the concurrent program set schedule:
  - **IBE: Order Lead Import Interval (In Days)**
  - **IBE: Quote Lead Import Interval (In Days)**

---

**Note:** If the interval profile options shown above are set to a fewer number of days than the concurrent program set schedule, then the interval profile options will capture data incorrectly. See the following example:

**Example:** If the concurrent program set is scheduled to run every 30 days and the interval profile options are each set to 10, then the concurrent program set will still run every 30 days -- but lead data will be captured only for 10 days.

---

When the concurrent program is run the second time, the End Date of iStore Lead Import Orders is Begin Date plus value of the profile IBE: Order Lead Import Interval. And for iStore Lead Import Quotes the End Date for the next run is Begin Date plus value of the profile IBE: Quote Lead Import Interval.

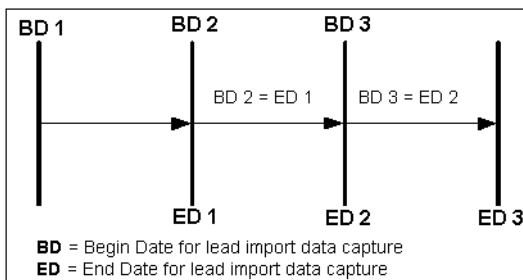
The graphic below shows how Begin Date and End Date are derived, if the concurrent program set is run on a schedule.

**Figure 29–1 How Lead Import Begin and End Dates are Determined****First time, manually run the concurrent program set:**

Enter a **Begin Date** Enter an **End Date** if desired, but **End Date** will default to system date (today's date) if not set.

**After the first time, run request set on schedule:**

**Begin Date** will automatically be the last **End Date**.



Set the following profile options to match days of concurrent program schedule:

- IBE: Order Lead Import Interval (In Days)
- IBE: Quote Lead Import Interval (In Days)

**Example 29–1 iStore Lead Import Begin and End Dates on 7-Day Schedule**

This example shows sample begin and end dates if the concurrent program set is run on an every-7-days schedule and the interval profile options are set to 7.

**Note:** End Date defaults to system date if not entered manually.

**First time: Enter Begin Date manually.**

Example Begin Date: 01-APR-2002 08:30:00 (April 1, 2002, 8:30 a.m.)

Example End Date: 01-MAY-2002 08:30:00 (May 1, 2002, 8:30 a.m.)

**After running for the first time, set the concurrent program to run on a schedule.**

**For example:**

Schedule the concurrent program set to run every 7 days and set IBE: Order Lead Import Interval and IBE: Quote Lead Import Interval to 7.

The concurrent program scheduler will select its Begin Date as last End Date that the program was run.

**Note:** To avoid overlaps or missed data, the system uses mathematical logic to stop the lead import batch process one millisecond before the actual End Date. Then it uses the actual End Date for the Begin Date of the next batch. See examples below.

### 1st scheduled running:

Begin Date = 01-MAY-2002 08:30:00

End Date = 08-MAY-2002 08:29:99

### 2nd scheduled running:

Begin Date = 08-MAY-2002 08:30:00

End Date = 15-MAY-2002 08:29:99

### 3rd scheduled running:

Begin Date = 15-MAY-2002 08:30:00

End Date = 22-MAY-2002 08:29:99

### 4th scheduled running:

Begin Date = 22-MAY-2002 08:30:00

End Date = 29-MAY-2002 08:29:99

## 29.6.2 iStore Lead Import Concurrent Program Enter Parameters Screen

The graphic below, iStore Lead Import Concurrent Program Enter Parameters Screen, shows the Parameters form used in running the program. The fields in the screen are described below the graphic.

**Figure 29-2 iStore Lead Import Concurrent Program Enter Parameters Screen**

Parameters

Begin Date

End Date

Debug Flag

Purge Flag

Write Detail Log

Prevent Leads From Party Number(s)

Source Code For Order Leads

Exclude Users with following Role(s)

OK Cancel Clear Help

### 29.6.2.1 Begin Date and End Date Fields

The first time you run the concurrent program set, be sure to run the programs manually by entering Begin and End Dates in the Parameters screen. When entering dates, use the format DD-MON-YYYY. For example, April 1, 2002 would be entered as 01-APR-2002. You can also enter hours and minutes, in the format HH:MM:SS. For example, 8:30 a.m. would be entered: 08:30:00.

**Note:** The End Date defaults on system date (today's date) if not set. After the first time run, the Begin Date defaults to the second after the last End Date completed.

Note that the request set will run in COMPLETE mode when the end date is entered, but will run in INCREMENTAL mode when the end date is not entered.

After you have run the concurrent program for the first time, it is recommended that you schedule the remaining lead import jobs, setting the interval profile options (IBE: Order Lead Import Interval and IBE: Quote Lead Import Interval) to the same number of days as the concurrent program set schedule.

### 29.6.2.2 Exclusion of Party Numbers Field

You can exclude specific parties from the lead data by entering the Party Number. The party number is an exposed field in Oracle customer modules, or it can be obtained from the HZ\_PARTIES table, PARTY\_NUMBER column. This is not to be confused with party\_id which is an internal unique key on HZ\_PARTIES. When entering party numbers, separate multiple parties by commas.

### 29.6.2.3 Source Code for <Order/Quote> Leads Field

You must identify sets of leads by promotion code in the **Source Code for Order Leads** field. This field maps to Source Code in the Oracle Sales applications, and originates in AMS\_SOURCE\_CODES\_VIEW table. In the **iStore Lead Import Quotes** concurrent program, you will specify a source code for carts, while in the **iStore Lead Import Orders** concurrent program, you specify a source code for orders. This source code tagging ensures consistency in marketing campaign source code tracking. For example, you can set one promotion code to mark the carts leads and another to mark the order leads. The source code is validated against AMS\_SOURCE\_CODES\_VIEW, and only one code can be used per program submission.

In Oracle Sales Online and Oracle TeleSales, sales representatives can query by source code (also called promotion code).

### 29.6.2.4 Exclude Users with Following Roles Field

You can exclude the capturing of user data from users with specific user roles by entering the role names separated by commas. For example, you may wish to exclude sales representative roles, iStore reseller roles, or other specific Oracle application roles. Role names can be obtained in documentation of the specific application carrying the role, and you can view a list of user roles in the Oracle CRM System Administrator Console. See [Chapter 13, "Implementing User Management"](#).

### 29.6.2.5 Logging Options Fields

The following fields enable various logging options. Enter either Yes or No in these fields. All three default to No if not set. Remember, setting the logging options to Yes may increase the time it takes to run the concurrent programs.

- **Debug Flag** -- Yes enables concurrent manager logging; log results can be viewed in the concurrent manager log file.
- **Purge** -- Yes enables two activities:
  1. The main log table (IBE\_LEAD\_IMPORT\_LOG) is populated with following information:
    - Number of carts or orders input to the Sales Lead Import Program
  2. The log details table is purged each time the program is run. The name of the table is: IBE\_LEAD\_IMPORT\_DETAILS
- **Write Detail Log** -- Yes enables the writing of details to the log details table (IBE\_LEAD\_IMPORT\_DETAILS) for every lead that is created. To see the details in the log details table, you must perform an SQL query on the table.

## 29.6.3 Run Sales Lead Import Concurrent Program

To import the leads into Oracle Sales Applications, run the Sales Lead Import Concurrent Program. This program creates leads from the data in the interface tables.

### 29.6.3.1 Sales Lead Import Concurrent Program Enter Parameters Screen

Following are the input parameters:

- **Lead Source System** -- Set to NEW for importing iStore leads; mandatory field
- **Show Debug Message** -- Default is No
- **Batch ID** -- Optional
- **Purge Error Message** -- Default is No

Note that the status of the leads in the Interface tables (AS\_IMPORT\_INTERFACE and AS\_IMP\_LINES\_INTERFACE) should be set to SUCCESS.

Refer to *Oracle Sales Implementation Guide* for additional information.

### 29.6.3.2 Output of Sales Lead Import Concurrent Program

Errors are logged into AS\_LEAD\_IMPORT\_ERRORS.

Refer to *Oracle Sales Implementation Guide* for additional information.





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## Integrating Oracle iStore with Oracle Sales Contracts

This chapter describes the integration of Oracle iStore 11i with Oracle Sales Contracts to provide Terms and Conditions (T&Cs) functionality in the Customer UI.

Main topics in this chapter include:

- [Section 30.1, "Overview of Oracle Sales Contracts"](#)
- [Section 30.2, "Using Terms and Conditions"](#)

### 30.1 Overview of Oracle Sales Contracts

Oracle Sales Contracts, through its integration with Oracle Order Management, allows sales representatives and others involved in the sales cycle to create short- or long-term customer contracts, including terms and conditions (T&Cs), for use in web-based stores, Oracle Quoting, and other Oracle E-Business Suite applications. The functionality leverages integration into Oracle's contract management system, and includes formal negotiation, complete with internal approval and customer acceptance processes. Oracle Sales Contracts users not only benefit from the fundamental capabilities required for sales negotiation, but from the additional contractual capabilities, such as T&Cs, price holds, and the capability to enforce the agreed upon-terms for future customer purchases. See the Oracle Order Management implementation and user documentation for more information.

### 30.1.1 Setting up Oracle Sales Contracts

Set up Oracle Sales Contracts according to the latest version of the *Oracle Order Management Suite Implementation Manual*. This documentation is available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

**Note:** To use the Terms and Conditions functionality, you must integrate with Oracle Quoting. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.

## 30.2 Using Terms and Conditions

Merchants can make it mandatory that T&Cs get attached to an order during checkout in Oracle iStore's Customer UI. In the Review and Place Order page, implementers can give customers the option to view T&Cs in HTML format, and then let them accept or reject the terms of the order. The T&Cs are contracts set up through Oracle Sales Contracts module. Each of your customer responsibilities can be tied to a different standard contract. In Oracle Quoting, sales representatives can alter the standard contract and then publish the cart/quote back to the customer for review.

### 30.2.1 Terms and Conditions Process Flow

The following is the process flow for T&Cs:

1. A customer creates a shopping cart and proceeds to checkout.
2. In the Review and Place Order page, the customer selects the terms and conditions link to review the standard T&Cs of the order. The T&Cs are presented in HTML format, with system variables -- such as customer and order information -- resolved into the T&Cs through APIs.

In this scenario, the T&Cs attached to the order are the standard contract specified by the profile option, ASO: Default Contract Template.

3. If the customer accepts the standard T&Cs, the order proceeds as normal. The T&Cs are attached to the sales order when the order is placed in Oracle Order Management.
4. If the customer rejects the standard T&Cs, the cart automatically becomes a quote in Oracle Quoting. The T&Cs are not attached to the quote at this time. An order must be placed with the quote for the T&Cs to be attached to the quote. Any comments the customer entered when rejecting the T&Cs are displayed for the sales representative in the Quoting UI.

5. At the same time, the sales representative is notified via e-mail. The customer's comments also are included in the e-mail. The sales representative can retrieve the quote and view or alter the quote details.

**Note:** The sales representative receiving the e-mail notification depends upon whether automatic sales representative assignment is set up through Oracle Territory Manager, and the value of the profile option, ASO: Default Salesrep. See [Section A.14.0.116, "ASO: Default Salesrep"](#), for more information.

6. The sales representative can launch the Contracts authoring tool via Oracle Quoting to change the T&Cs attached to the order.
7. If an approval process is being used in Oracle Quoting, the sales representative submits the quote -- with the T&Cs attached -- for approval.
8. Whether or not the approval process has completed, the sales representative can publish the quote back to the customer in the Oracle iStore Customer UI -- if the quote is approved, the customer can place the order, but if the quote is still pending approval, it will not be orderable.

Note that if a sales representative publishes a quote to Oracle iStore with no T&Cs attached, and the customer places an order with the quote, the default contract associated with the site will be attached to the sales order (assuming that there is a default contract associated with the site).

9. Once an order is placed with the quote, the T&Cs attached to the quote get passed along to Oracle Order Management with the sales order. See [Section 28.3, "Quote Publishing"](#), for more information on quote publishing. In addition, any contract documents that the sales representative has attached to the quote also are submitted with the order. Note that the customer will not be able to view the contract documents attached to the order.

**Note:** If the user requests sales assistance while placing the order, the T&Cs are not attached to the quote.

Please refer to the Oracle Quoting documentation for more information about sales representative functionality.

For general information about Sales Assistance, see [Section 14.2, "Sales Assistance"](#).

### 30.2.1.1 Express Checkout with Terms and Conditions

When customers submit orders for Express Checkout, they can preview the standard T&Cs associated with the shopping cart where they placed the items into their express checkout queue. If the customer doesn't agree with the T&Cs, they

should cancel the express checkout order. See [Section 12.4.8, "Express Checkout"](#), for more information about Express Checkout.

## 30.2.2 Implementing Terms and Conditions

In addition to setting up the contract authoring tool (and any other related setups), the following steps are required to set up the T&Cs functionality for use with Oracle iStore.

**Note:** The system maintains reference to the T&C standard contract at the quote header level.

- [Section 30.2.2.1, "Implement Oracle CRM Application Foundation Notes Module"](#)
- [Section 30.2.2.2, "Set Profile Options"](#)
- [Section 30.2.2.3, "Set up Contract Template Document Type"](#)

### 30.2.2.1 Implement Oracle CRM Application Foundation Notes Module

Comments associated with a T&Cs rejection scenario are stored in Oracle CRM (JTA) Notes; therefore, this module is a required dependency for the T&Cs functionality. See the latest version of the *Oracle Common Application Components Implementation Guide* for information on how to set up the Notes module.

### 30.2.2.2 Set Profile Options

Set the following profile options:

- **OKC: Enable Sales Contracts** --- See [Section A.14, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#)
- **ASO: Default Contract Template** --- See [Section A.14, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#)
- **IBE: Enforce Terms and Conditions** --- See [Section A.7.0.35, "IBE: Enforce Terms and Conditions Review by User"](#)
- **IBE: Use Sales Assistance Feature** --- See [Section A.7.0.69, "IBE: Use Sales Assistance Feature"](#)

### 30.2.2.3 Set up Contract Template Document Type

For Oracle iStore T&Cs to function properly, ensure that the contract template document is enabled for the document types, Sales Order and Quote.

### 30.2.3 Sales Assistance with Terms and Conditions Rejection

When a customer rejects the T&Cs by pressing *Disagree* after viewing the T&Cs, Oracle iStore initiates sales representative assistance. You must set up Sales Assistance to allow customers to reject T&Cs. See [Section 14.2, "Sales Assistance"](#), for the more information on the process flow.



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# Integrating Oracle iStore with Oracle Shipping Execution

This chapter describes the integration of Oracle iStore 11i with Oracle Shipping Execution.

This chapter's main topics include:

- [Section 31.1, "Overview of Oracle Shipping Execution"](#)
- [Section 31.2, "Setting up Oracle Shipping Execution"](#)

## 31.1 Overview of Oracle Shipping Execution

The Oracle Order Management Suite's Shipping Execution module allows you to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing.

## 31.2 Setting up Oracle Shipping Execution

The Oracle Shipping Execution module must be in place to enable post-order tracking and shipping detail views in Oracle iStore. At a minimum, you must perform the following tasks when setting up Oracle Shipping Execution:

- Define pick slip grouping rules.
- Define release sequence rules.
- Define shipping parameters.
- Define freight carriers.
- Define carrier-shipping method relationships.

See *Oracle Shipping Execution User's Guide* for more information.

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**Note:** Set up shipping methods in Oracle Inventory, not Oracle Shipping.

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# Integrating Oracle iStore with Oracle Single Sign-On

This chapter describes the integration of Oracle iStore 11i with Oracle Single Sign-On (SSO).

This chapter's main topics include:

- [Section 32.1, "Overview of Single Sign-On"](#)
- [Section 32.2, "Single Sign-On Functionality with Oracle iStore"](#)
- [Section 32.3, "Implementing Oracle Single Sign-On with Oracle iStore"](#)

## 32.1 Overview of Single Sign-On

Single Sign-On (SSO) provides the capability for enterprises to manage access to applications via a single-authentication architecture. Using SSO, an enterprise is able to avoid maintaining multiple user accounts, thus enhancing security and lowering costs. By leveraging SSO, companies are able to blend their e-commerce applications with existing corporate web assets to provide a single, comprehensive web presence. Single sign-on (SSO) supports this effort by allowing a number of different applications common to an enterprise to share a common authentication service. With Oracle's enterprise-wide Single Sign-On, a user is required to log on, or authenticate himself, only once. The verification of his identity is valid for the duration of the user's session, and for every application participating in the SSO framework. The user session ends, across every application, when he logs out.

For users of the Oracle E-Business Suite, the Single Sign-On framework is provided by Oracle 10G Single Sign-On Application Server (SSO Server). Participating applications can be Oracle E-Business (CRM/ERP) applications, other Oracle applications like Oracle Portal, as well as third-party applications.

### 32.1.1 Implementing Oracle Single Sign-On Server

Implement Oracle Single Sign-On Server using the appropriate version of the Oracle 10G Application Server documentation. See:

- Installation Guide --- *Installing Oracle Application Server 10g with Oracle E-Business Suite Release 11i* (MetaLink Note 233436.1)
- Implementation Guide --- *Implementing Oracle Application Server 10g with Oracle E-Business Suite Release 11i* (MetaLink Note 261914.1)

This document is available on OracleMetaLink (<http://metalink.oracle.com>).

## 32.2 Single Sign-On Functionality with Oracle iStore

This section describes Oracle iStore's behavior and related rules in the Customer UI with Single Sign-On enabled. Topics include:

- [Section 32.2.1, "User Authentication"](#)
- [Section 32.2.2, "User Session Parameters"](#)
- [Section 32.2.3, "Login/Logout"](#)
- [Section 32.2.4, "User Notification Events"](#)
- [Section 32.2.5, "User Registration"](#)
- [Section 32.2.6, "User Management with SSO"](#)
- [Section 32.2.7, "Oracle iStore Sensitive Pages"](#)
- [Section 32.2.8, "Language Support"](#)

### 32.2.1 User Authentication

When integrating Oracle iStore with SSO, all user authentication processes (except the guest user authentication) are controlled by the SSO Server. Following is the authentication flow.

1. User selects a specialty site and is treated as a guest user until the user logs in.
2. Once the user decides to log in, the user is directed to the SSO server, which will decide if the user has been authenticated previously.
3. If the user has not been SSO-authenticated, an SSO login screen will prompt the user to enter his credentials. Once authenticated, the user is taken to the previously selected specialty site page.

How the user is treated next depends upon whether he is a registered Oracle iStore user:

- a. If the user is a registered Oracle iStore user, the user will be treated as a registered Oracle iStore user, with full privileges in the sites.
  - b. If the user is an unapproved (registration approval pending; applies only to B2B users) Oracle iStore user, then the user will be provided a message with their pending registration status and will be denied access to the sites. In this case, however, the user's session, will continue to be SSO authenticated.
4. If the user has been previously SSO authenticated, the user is immediately taken back to the previously selected specialty site page, unless the user is an unapproved B2B user -- In this case the user is provided with a message showing his pending registration status and is denied access to the sites. In this case, however, the user's session, will continue to be SSO authenticated.

## 32.2.2 User Session Parameters

As users navigate the Oracle iStore Customer UI as guest users, they have the ability to choose different languages, currencies, and specialty sites. With SSO, a user's session selections are preserved as the user transitions from a guest user to an authenticated SSO user.

## 32.2.3 Login/Logout

All Oracle iStore login and logout (sign-in and sign-out) functionality will be provided by the SSO Server.

The sign-in/sign-out links in the Customer UI Welcome Bin and the global sign-in/sign-out icons will point to the SSO Server. The URL for the links and icons are derived from the Oracle Application Technology Foundation profile option that specifies the SSO server location.

## 32.2.4 User Notification Events

The Oracle iStore Forgot Password notification event will not be used when integrating Oracle iStore with the SSO Server.

For the registration notifications, implementers who use Oracle iStore as their external registration will see no change. If not using Oracle iStore, the notification will not be used.

## 32.2.5 User Registration

SSO implementers will be required to use Oracle iStore's registration pages for registering both B2C and B2B users.

A registration page is available from the global navigation bar registration icon and the registration link in the Customer UI Welcome Bin.

After a user is authenticated, the registration button and registration link do not display to the registered, approved user.

## 32.2.6 User Management with SSO

This section discusses user management functionality with Oracle iStore and SSO integration.

### 32.2.6.1 B2B User Management

Without SSO, an Oracle iStore B2B Primary User has the ability to create additional user accounts and to re-set these users' passwords. After these accounts are created -- and if SSO is enabled and passwords are managed external to the Oracle E-Business Suite -- the primary user will not be able to change the password for these users. The password reset box normally available to the Primary User will be unavailable in this scenario.

Oracle iStore does not provide the capability to manage multiple Oracle E-Business Suite accounts per SSO user. Only the current, default Oracle E-Business Suite account that is enabled for SSO is supported when using Oracle iStore.

### 32.2.6.2 Password Changes by Customers

Oracle iStore customers can change their passwords in the Customer UI personal information profile screens. In the Personal Information page, when SSO is enabled and passwords managed externally, customers will see a link directing them to the SSO page, where they can change their passwords.

## 32.2.7 Oracle iStore Sensitive Pages

When SSO is enabled, Oracle iStore does not support forced re-authentication via sensitive pages. Implementers should set the profile option, IBE: Use Sensitive Pages, to No to turn off the forced re-authentication in Oracle iStore. Thus, when SSO is enabled, SSO-authenticated users are not prompted to re-enter their passwords when navigating from non-sensitive pages (for example, the shopping cart page) to sensitive pages (for example, the shipping page).

### 32.2.8 Language Support

Users will need to install languages for SSO that are supported by Oracle iStore. The SSO Login page will have the same UI for all users and sites, but will contain the content appropriate for a particular language based on the user's browser settings.

## 32.3 Implementing Oracle Single Sign-On with Oracle iStore

There are no Oracle iStore-specific setups that are required for SSO. Implement Oracle Single Sign-On Server using the appropriate version of the Oracle 10G Application Server documentation. See [Section 32.1.1, "Implementing Oracle Single Sign-On Server"](#).



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## Integrating Oracle iStore with Oracle9iAS Web Cache

This chapter describes the integration of Oracle iStore 11i with Oracle9iAS Web Cache.

This chapter's main topics include:

- [Section 33.1, "Overview of Oracle9iAS Web Cache"](#)
- [Section 33.2, "Oracle iStore Functionality with Oracle9iAS Web Cache"](#)
- [Section 33.3, "Setting up Oracle9iAS Web Cache"](#)
- [Section 33.4, "Partial Web Cache"](#)
- [Section 33.5, "Dynamic Page Cacheability for Section Configurable Layout"](#)

### 33.1 Overview of Oracle9iAS Web Cache

An integrated component of Oracle's application server infrastructure, Oracle9iAS Web Cache is an innovative content delivery solution designed to accelerate dynamic web-based applications and reduce hardware costs.

Oracle9iAS Web Cache accelerates the customer presentation of Oracle iStore's non-transactional content, including:

- Static pages and images
- Catalog pages

By compressing and caching dynamically generated content, Oracle9iAS Web Cache reduces the load on the other tiers in the architecture and shortens the amount of time required to serve cached content. Once a page is loaded into the cache, other

requests for the same page are served from the cache memory instead of the application server.

Through the inclusion of a set of Oracle9iAS Web Cache-specific tags in the HTML, Oracle9iAS Web Cache is also capable of caching content with some personalization.

Additionally, the cache server can load balance requests across multiple HTTP servers.

Oracle9iAS Web Cache is compatible with Oracle HTTP Server or any other HTTP-compliant application web server.

Possible scenarios for deployment of Oracle9iAS Web Cache include the following:

- Deploy Oracle9iAS Web Cache on the same computer as the application web server or on a separate computer.
- Use Oracle9iAS Web Cache as a load balancer or in a Failover pair.
- Install Oracle9iAS Web Cache inside or outside the firewall.

## 33.2 Oracle iStore Functionality with Oracle9iAS Web Cache

In order to integrate Oracle9iAS Web Cache 9.0.2.0.0 with the Oracle iStore Customer UI, you must deploy it in the same domain as the application web servers. The reason for deploying it in the same domain is that Oracle iStore session cookies are created by application servers and are only visible to other servers within the same domain. The subdomain, however, can be different.

You can set up Oracle9iAS Web Cache to cache and serve the following Oracle iStore pages and files:

- Catalog JSPs
  - ibeCCt\*.jsp
- Other pages, such as:
  - style sheet files
  - static HTML pages
  - GIF and JPG/JPEG image files
  - JavaScript (\*.js) files
  - jtfdload.jsp files



For complete information about Oracle9iAS Web Cache deployment, see documentation for Oracle9iAS Web Cache, Release 9.02.0.0. If you are running a version of Oracle9iAS Web Cache other than the one listed here, please use the documentation appropriate to your version.

### **33.2.1 Preview Mode Not Supported Through 9iAS Web Cache**

Oracle iStore's Preview mode allows merchants to preview Customer UI specialty sites while working on them in the Site Administration UI. In a typical scenario, when the merchant selects the Preview button in Site Administration UI, the Customer UI is retrieved through the application server and uses data cached through JTT Cache. This ensures freshly cached data.

There may be cases however, when the merchant enters Preview mode through Oracle9iAS Web Cache. This type of preview, however, is not supported due to likelihood of seeing stale cached data.

### **33.2.2 Using Oracle9iAS WebCache with SSL**

Other than setting the profile options listed in the next paragraph, nothing specific from Oracle iStore is required when using Oracle9iAS Web Cache with SSL. Check Oracle9iAS Web Cache documentation for details of setup with SSL.

When integrating Secure Socket Layer functionality with Oracle9iAS Web Cache, set the profile options, IBE: iStore Non Secure URL and IBE: iStore Secure URL to the web cache secure and non secure URL.

For example set IBE: iStore Secure URL to `https://<web cache servername>:<port number>/<JSP directory or OA_HTML>/`.

Bounce the server after making these changes.

## **33.3 Setting up Oracle9iAS Web Cache**

Set up Oracle9iAS Web Cache to cache and serve Oracle iStore Customer UI pages, using the following procedures.

### **Prerequisites**

Your Oracle iStore implementation must meet the following requirements for integration with Oracle9iAS Web Cache:

- Your sites must not allow Express Checkout. Set the profile option IBE: Use Express Checkout to No. See [Section 12.4.8, "Express Checkout"](#) for more information.
- Your sites must use the site price lists. Set the profile option IBE: Use Price List Associated with Specialty Site to Yes. See [Chapter 10, "Implementing Pricing"](#), for more information.
- Set the profile option IBE: Use Web Cache Feature to Yes. This enables Oracle iStore to create the cookies that you will set up Oracle9iAS Web Cache to use for session tracking.

### Steps

1. [Perform Initial Setup for Oracle9iAS Web Cache](#)
2. [Create a Rule for Multiple Documents with Same Selector \(URL\) by Cookies](#)
3. [Create Session/Personalized Attribute Definitions](#)
4. [Create Session/Personalized Attribute Related Caching Rules](#)
5. [Create Cacheability Rules](#)
6. [Create Expiration Rules](#)
7. [Create a Selector Association for the Multiple Documents Rule](#)
8. [Create Selector Associations for Sessions and Personalized Attributes](#)
9. [Set Up Simple Personalization](#)
10. [Set Up Test Environment](#)

## 33.3.1 Perform Initial Setup for Oracle9iAS Web Cache

Check your deployment requirements. Make sure the following Oracle9iAS Web Cache setups are correct:

- Administration Port and Protocol
- Invalidation/Statistics Port and Protocol
- Security
- Resource Limits
- Process Identity
- Apology Pages

- Application Web Servers
- Oracle9iAS Web Cache Listen Ports
- Access Logs

For complete information about Oracle9iAS Web Cache deployment, see documentation for Oracle9iAS Web Cache, Release 9.02.0.0. If you are running a version of Oracle9iAS Web Cache other than the one listed here, please use the documentation appropriate to your version.

### 33.3.2 Create a Rule for Multiple Documents with Same Selector (URL) by Cookies

You can set up Oracle9iAS Web Cache to use the Oracle iStore cookie, **CombinedCookie**, to identify multiple versions of the same catalog page based on the cookie value. CombinedCookie allows the Web Cache to then cache the page versions separately for different users.

The cookie, CombinedCookie, combines:

- Minisite ID (minisite\_id)
- Responsibility ID (resp\_id)
- Language (language\_code)
- Currency (currency\_code)
- Customer type - Customer type can be anonymous, individual, business, or primary business user.

While serving a page, Web Cache looks at the CombinedCookie to determine if the appropriate version of the page is available in the cache. If it is available, then the page is served from the cache. If it is not, the request is forwarded to Apache/Jserv and the resulting page is cached against that page version.

Using the steps below, create a rule for multiple documents with the same selector by the **CombinedCookie** cookie.

You will later create a selector association between this rule and the catalog JSPs, as described in [Section 33.3.7, "Create a Selector Association for the Multiple Documents Rule"](#).

#### Steps

1. In Oracle9iAS Web Cache Manager, choose Multiple Documents with Same Selector by Cookies, under Administering Web Sites > Cacheability Rules.

2. Select Create or Add. The Edit/Create Multiple Documents with the Same Selector by Cookies Rule window opens.
3. Create the cookie selector for Oracle iStore catalog pages with the following parameters:
  - Cookie Name = CombinedCookie
  - Cache without Cookie = NO
4. Select **Apply Changes** when finished.

### 33.3.3 Create Session/Personalized Attribute Definitions

Session tracking does not alter the actual content of a page. Therefore, session definitions enable Oracle9iAS Web Cache to share the same caches with multiple sessions by substituting one user's session information with another's based on the session information in the session cookies.

For Oracle9iAS Web Cache to serve pages to a client browser, the browser's cookies must be enabled. If cookies are disabled, Oracle iStore still works, but Web Cache does not serve its pages. Instead, Oracle9iAS Web Cache redirects any HTTP request that does not include session cookies to the application servers.

Oracle iStore uses the following session cookies:

- **JTT Session Cookie** - Contains information about the JTT session
- **ICX Session Cookie** - Contains information about the database session

You must create the session definitions **JTTSession** and **ICXSession** so that Oracle9iAS Web Cache can track the session cookies.

You must also create personalized attribute definitions for the Oracle iStore cookies **PersonName** and **CartTotal**.

Oracle9iAS Web Cache can use the Oracle iStore cookies listed in the following table, [Table 33–1, "Oracle iStore Cookies for Welcome Bin Personalization"](#), to share the same cache with multiple users by substitution of personalized information into the catalog pages' welcome bin.

**Table 33–1 Oracle iStore Cookies for Welcome Bin Personalization**

Cookie	Function
PersonName	Stores the user's first and last names
CartTotal	Stores the user's shopping cart amount

Oracle9iAS Web Cache's substitution of personalized information into cached pages is called Simple Personalization. `ibeCAcdWelcome.jsp`, the seeded JSP for the Welcome Bin, includes the Oracle9iAS Web Cache tags for Simple Personalization within HTML comments, which are transparent to application servers. You will later enable Simple Personalization as described in [Section 33.3.9, "Set Up Simple Personalization"](#).

If you are previewing the specialty site display of items and sections before publishing them, as described in [Section 19.1.2, "Using Preview Mode"](#), you should access the application server directly and not via Oracle9iAS Web Cache. This ensures that you are previewing the latest version of the pages.

### Steps

1. In Oracle9iAS Web Cache Manager, choose Session/Personalized Attribute Definition, under Administering Web Sites > Session Management.
2. Select Create or Add. The Create/Edit Session/Personalized Attribute Definition window opens.
3. Create the sessions and personalized attributes listed in the following table, and select Apply Changes when finished.

The following table, [Table 33–2, "Oracle9iAS Web Cache Session and Personalized Attribute Definitions"](#), shows the session and personalized attribute definitions.

**Table 33–2 Oracle9iAS Web Cache Session and Personalized Attribute Definitions**

Session/Attribute	Cookie Name
UserNameCookie	PersonName
CartTotalCookie	CartTotal
ICXSession	The ICX Session Cookie name is <DB_HOST>_<DB_NAME>, where the values for DB_HOST and DB_NAME come from the .dbc file on the middle tier.
JTTSession	<DB_HOST>_<DB_NAME>_p<JTT Cookie property value>. (The JTT cookie property value can be set in JTT admin console. The property name is "cookie_name". Remember to add "p" before the property value because iStore is using persistent cookie)

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**Note:** Customers who are running Oracle iStore patchset IBE.M and above must remove or disable the following two personalized attributes and related caching rules: `SignInOutUrlCookie` and `SignInOutImageCookie`. These personalized attributes were obsoleted in Oracle iStore patchset IBE.M.

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33.3.4 Create Session/Personalized Attribute Related Caching Rules

You must create caching rules for the sessions and personalized attributes that you have defined.

Steps

- 1. In Oracle9iAS Web Cache Manager, choose Session/Personalized Attribute Related Caching Rules, under Administering Web Sites > Session Management.
- 2. Select Create or Add. The Add Session/Personalized Attribute Related Caching Rule window opens.
- 3. Create the caching rules listed in the following table, [Table 33–3, "Oracle9iAS Web Cache Session/Personalized Attribute Caching Rules"](#), and save your changes.

**Table 33–3** Oracle9iAS Web Cache Session/Personalized Attribute Caching Rules

Session/Attribute	Cache without Session/Attribute	Cache with Session/Attribute	Can be derived without Session/Attribute
UserNameCookie	No	Yes	No
CartTotalCookie	No	Yes	No
ICXSession	Yes	Yes	No
JTTSession	No	Yes	No

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**Note:** If you have already set up Oracle9iAS Web Cache with iStore 11.5.6, please remove the following personalized attribute definitions and the related caching rules: `SignInOutImageCookie` and `SignInOutUrlCookie`.

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### 33.3.5 Create Cacheability Rules

Set up Oracle9iAS Web Cache to cache all Oracle iStore catalog pages, except `ibeCCtpBuyRoute.jsp`, for the HTTP methods GET, GET with query string, and POST with any parameters. The Oracle iStore catalog pages are named `ibeCCt*.jsp`.

`ibeCCtpBuyRoute.jsp` is not cacheable because it invokes the real-time shopping cart process and is a route page to the shopping cart display page. Oracle9iAS Web Cache can cache all other catalog route pages.

Additionally, you can set up Oracle9iAS Web Cache to cache style sheet files, static HTML pages, GIF and JPG/JPEG image files, JavaScript (\*.js) files, and `jtfdload.jsp`.

You should enable compression of all JSPs and HTML pages, and disable compression of images. You can enable or disable compression of JavaScript files and style sheets. Style sheets should not be compressed for Netscape browsers.

#### Steps

1. In Oracle9iAS Web Cache Manager, choose Administering Web Sites > Cacheability Rules.
2. Select the last default rule and select Insert Below. The Create Cacheability Rule window opens.
3. Create the cacheability rules listed in the following table, [Table 33–4, "Oracle9iAS Web Cache Cacheability Rules"](#), and select Apply Changes when finished.

**Table 33–4 Oracle9iAS Web Cache Cacheability Rules**

Priority	URL Expression	HTTP Methods	POST Body Expression	Cache/ No Cache	Compress
1	<code>\.pdf\$</code>	GET, GET with query string		Don't Cache	Off
2	<code>\.html?\$</code>	GET, GET with query string		Cache	On for all browsers
3	<code>\.jpe?g\$</code>	GET, GET with query string		Cache	Off
4	<code>\.gif\$</code>	GET, GET with query string		Cache	Off
5	<code>\.js\$</code>	GET, GET with query string		Cache	On for all browsers, or off

**Table 33–4 Oracle9iAS Web Cache Cacheability Rules (Cont.)**

Priority	URL Expression	HTTP Methods	POST Body Expression	Cache/No Cache	Compress
6	\.css\$	GET, GET with query string		Cache	On for non-Netscape browsers, or off
7	/OA_HTML/ibeCCtpBuyRoute\*.jsp.*	GET, GET with query string, POST	.*	Don't Cache	On for all browsers
8	/OA_HTML/ibeCCt.*\*.jsp.*	GET, GET with query string, POST	.*	Cache	On for all browsers
9	/OA_HTML/jtfdload.jsp	GET, GET with query string		Cache	Off

### 33.3.6 Create Expiration Rules

When you change catalog content, Oracle9iAS Web Cache does not automatically invalidate cached pages. You must define expiration rules based on a time interval or invalidate cached pages manually in Web Cache Manager. Expiration rules specify when documents expire in the cache, and how long documents can reside in the cache after they expire.

You should set up your expiration rules according to your content management needs. Since Oracle iStore JSPs and HTML pages do not include expiration headers, you cannot set up expiration rules for these pages using "As per HTTP Expires header."

Here is an example of some expiration rules that you can define:

- Invalidate all scripts, style sheet files, cached JSPs, and cached HTML pages every two hours after cache entry, then refresh them within two minutes based on the application servers' capacity.
- Invalidate all image files every two days after cache entry, then refresh them within five minutes based on the application servers' capacity.

To set up these sample expiration rules, use the following procedure.

#### Steps

1. In Oracle9iAS Web Cache Manager, choose Expiration Rules, under Administering Web Sites > Cacheability Rules.



2. Click Create or Add. The Create Expiration Rule window opens.
3. Create the expiration rules and selector associations listed in the following table, [Table 33–5, "Oracle9iAS Web Cache Expiration Rules"](#), and select Apply Changes when finished.

**Table 33–5 Oracle9iAS Web Cache Expiration Rules**

Expire	After Expiration	Selector Association
7200 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 120 seconds after expiration.	\.html?\$ \.css\$ \.js\$ /OA_HTML/ibeCct.*\.jsp.*
172800 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 300 seconds after expiration.	\.jpe?g\$ \.gif\$ /OA_HTML/jtfdload\jsp.*

### 33.3.7 Create a Selector Association for the Multiple Documents Rule

Create a selector association to associate catalog JSPs with the rule for multiple documents with the same selector by the Oracle iStore cookie CombinedCookie.

#### Steps

1. In Oracle9iAS Web Cache Manager, choose Multiple Documents with Same Selector by Cookies, under Administering Web Sites > Cacheability Rules.
2. Select the rule for the cookie name CombinedCookie.
3. Select Change Selector Association. The Change Policy-Selector Association window opens.
4. Create an association between the selector /OA\_HTML/ibeCct.\*\jsp.\* and the rule. Click **Apply Changes** when finished.

### 33.3.8 Create Selector Associations for Sessions and Personalized Attributes

You must associate the selectors that are listed in your cacheability rules with the sessions and personalized attributes that you have defined. Apply the session definitions JTTSession and ICXSession to all cached JSPs. Do not bind them to other cached files, such as image files and scripts.

Steps

- 1. In Oracle9iAS Web Cache Manager, choose Session/Personalized Attribute Related Caching Rules, under Administering Web Sites > Session Management.
- 2. Select a session or attribute.
- 3. Select Change Selector Association. The Change Policy-Selector Association window opens.
- 4. Create the selector associations listed in the following table, [Table 33–6, "Oracle9iAS Web Cache Session/Personalized Attribute Selector Associations"](#), for each session and attribute. Click Apply Changes when finished.

**Table 33–6 Oracle9iAS Web Cache Session/Personalized Attribute Selector Associations**

Session/Attribute	Selector Associations
UserNameCookie	/OA_HTML/ibeCCt.*\.jsp.*
CartTotalCookie	/OA_HTML/ibeCCt.*\.jsp.*
ICXSession	/OA_HTML/ibeCCt.*\.jsp.* /OA_HTML/jtfdload.jsp
JTTSession	/OA_HTML/ibeCCt.*\.jsp.* /OA_HTML/jtfdload.jsp

33.3.9 Set Up Simple Personalization

Use the following procedure to set up Simple Personalization.

Steps

- 1. In Oracle9iAS Web Cache Manager, choose Simple Personalization, under Administering Web Sites > Cacheability Rules.
- 2. Select Parse HREFs = NO.
- 3. Click Change Selector Association. The Change Policy-Selector Association window opens.
- 4. Make the selector association listed in the following table, [Table 33–7, "Oracle9iAS Web Cache Simple Personalization Selector Association"](#), for simple personalization.
- 5. Select Apply Changes when finished.

**Table 33–7 Oracle*9i*AS Web Cache Simple Personalization Selector Association**

Selector	Parse HREFs
/OA_HTML/ibeCCt.*\..jsp.*	NO

### 33.3.10 Set Up Test Environment

You can validate cacheability rules by monitoring three log files:

- The Oracle*9i*AS Web Cache access log
- The Oracle*9i*AS Web Cache event log
- The application server's access log

Set up the Oracle*9i*AS Web Cache event log in verbose mode using the following procedure.

#### Steps

1. In Oracle*9i*AS Web Cache Manager, choose Administering Oracle Web Cache > Event Logging.
2. Click Edit and check YES for Verbose mode.
3. Apply the change to Oracle*9i*AS Web Cache.

## 33.4 Partial Web Cache

Oracle iStore supports using Partial Web Cache to dynamically cache parts of catalog pages. Out-of-the-box, only the seeded Welcome Bin uses this feature. This section outlines how to use Oracle iStore Partial Web Cache feature in your customized JSPs. Topics include:

- [Section 33.4.1, "Partial Web Cache Overview"](#)
- [Section 33.4.2, "Partial Web Cache Functional Flow"](#)
- [Section 33.4.3, "Partial Web Cache Prerequisites"](#)
- [Section 33.4.4, "Implementing Partial Web Cache"](#)

### 33.4.1 Partial Web Cache Overview

Also known as Partial Page Caching in Oracle*9i*AS Web Cache, this functionality provides dynamic assembly of web pages with both cacheable and non-cacheable

page fragments. Therefore, web pages can be broken down into fragments of different cacheability profiles. These fragments are each maintained as separate elements in the application web server or content delivery network. The fragments are assembled into HTML pages as appropriate when requested by end users. The page assembly can be conditional, based on information provided in HTTP request headers or end-user cookies.

The basic structure a content provider uses to create dynamic content is a template page (container page) containing HTML fragments (for example, Oracle iStore bins). The container page is associated with the URL that end users request, and also configured with Edge Side Includes (ESI) markup tags that tell Oracle9iAS Web Cache to fetch and include each individual bin.

Out-of-the-box, Partial Web Cache is pre-integrated with Oracle iStore section layout pages and the seeded Welcome Bin.

#### 33.4.1.1 Terminology

The following terminology will be used in this section:

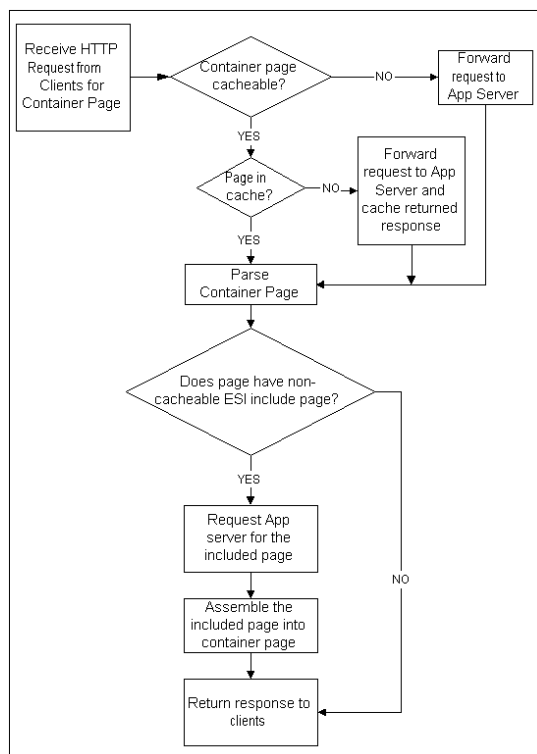
- **ESI Bin** --- The HTML fragment page included into the container page through ESI tag
- **ESI Container Page** --- The template page that contains ESI bins

### 33.4.2 Partial Web Cache Functional Flow

Following is the Partial Web Cache functional flow:

1. An HTTP request is made for a container page.
2. If the requested container page is cacheable, web cache checks to see if the page is already in the cache.
3. If the requested container page is not cacheable, or if the page is not in the cache, the request is forwarded to the application server which serves up the parsed container page.
4. From here, the application checks to see if the container page has a non-cacheable ESI include -- If not, the request is fulfilled.
5. If the container page does have a non-cacheable ESI include page, then the included page is assembled into the container page, and the request is fulfilled.

The following figure, [Figure 33–1, "Partial Web Cache Functional Flow"](#), depicts the flow:

**Figure 33–1 Partial Web Cache Functional Flow**

### 33.4.3 Partial Web Cache Prerequisites

The following are required before implementing this technology:

- Oracle9iAS Web Cache 9.0.2 or later
- Oracle iStore Release 11.5.10 or later

### 33.4.4 Implementing Partial Web Cache

Following are the steps to implement Partial Web Cache:

- [Section 33.4.4.1, "Understand Partial Web Cache"](#)
- [Section 33.4.4.2, "Plan Your Customization"](#)
- [Section 33.4.4.3, "Customize ESI Bin"](#)

- [Section 33.4.4.4, "Customize ESI Container Page"](#)
- [Section 33.4.4.5, "Post-Setup and Testing"](#)

#### **33.4.4.1 Understand Partial Web Cache**

When you are preparing to customize your pages to support Partial Web Cache, you first must understand the concepts of partial web cache and ESI INCLUDE, the flow involved in the ESI pages, and the corresponding interactions between the Oracle9iAS Web Cache server and the Oracle iStore application server. Please refer to Oracle9iAS Web Cache documentation for more details.

#### **33.4.4.2 Plan Your Customization**

In the planning phase, you need to go through the following questions one by one:

1. What customization do I need?

Normally, there are two customization cases you can choose:

- a. Web-cacheable ESI container page with non-web-cacheable ESI bin
- b. Non-web-cacheable ESI container page with web-cacheable ESI bin.

Think through your business needs and decide which case applies to your organization.

2. Which bin(s) needs to be customized as ESI bin(s)?

Out-of-box, only the Welcome Bin is an ESI bin. You can customize other seeded bins, or your customized bins, to be ESI bins. Decide which bin(s) should be customized. Note that the candidate bin(s) should have different web-cacheability than its container page, or at least one of its container pages (if being included by many container pages).

3. Where should I map my new ESI bin to Oracle iStore runtime?

Find the template access name and the corresponding mapped JSP through the Site Administration UI Template Manager.

4. Do I need to customize the container page as an ESI container page?

Normally, you do not need this step if your ESI bin is included in the seeded Oracle iStore container page, unless you have a customized container page, and this container page includes some ESI bins that have different web-cacheability rules.

An ESI bin behaves as a regular bin if being included in a non-ESI container page.

5. Which container page needs to be customized?

Find the template access name and the corresponding mapping condition for your ESI bin JSP page through the Site Administration UI Template Manager.

6. Where should I map my new ESI container page to Oracle iStore runtime?

Find the template access name and the corresponding mapping condition for your ESI container JSP page through the Site Administration UI Template Manager.

7. What file name should I use for my new ESI bin and ESI container page?

You should follow the following name convention to name your new ESI bins and container Pages:

- a. ibeCCt\*.jsp for web-cacheable ESI container pages and ESI bins
- b. Any other names for non-web-cacheable ESI container pages and ESI bins

Also pay attention to the template access names of your ESI bins. They should NOT end with IBEWC. See [Section 33.5, "Dynamic Page Cacheability for Section Configurable Layout"](#), for more information.

8. How should I test my new ESI pages?

First set up the Oracle9iAS Web Cache server and the Oracle iStore application server, and ensure that these work properly for all the of the out-of-box Oracle iStore pages. Then come up with a good test plan to test your customized ESI bins and ESI container pages later.

### 33.4.4.3 Customize ESI Bin

Oracle9iAS Web Cache server handles ESI container page and ESI bin page as individual cache entities that can be configured separately. Therefore, you need to customize an ESI bin only when it has different web cache cacheability than its container page.

Also, ESI bins would behave just as regular bins, when:

- 1. Being included inside non-ESI container pages
- 2. Oracle Webcache is not enabled

#### Steps

- 1. Set the following page context at the very beginning
- 2. Include ibeCWcpESIBinTop.jsp instead of ibeCZzpRuntimeIncl.jsp, as below:

```
<% pageContext.setAttribute("esiURL"); %>
<!--@ include file=" ibeCZzpRuntimeIncl.jsp" --%>
<%@ include file="ibeCWcpESIBinTop.jsp" %>
```

3. Include ibeCWcpESIBinBottom.jsp at the end, as below:

```
<%@ include file="ibeCWcpESIBinBottom.jsp" %>
```

4. Do not use Oracle9iAS Web Cache Personalization tags

Example: Only the code marked in bold is specific to an ESI bin:

```
<% pageContext.setAttribute("esiURL", "ibeCAcdWelcome.jsp",
PageContext.REQUEST_SCOPE); %>
<%@ include file="ibeCWcpESIBinTop.jsp" %>
<%
final String J = "ibeCAcdWelcome.jsp";
if (! RequestCtx.userIsSalesRep()) {
boolean bEnableTransaction =
!RequestCtx.userIsStoreAdmin();
boolean bMaintenanceMode = IBEUtil.isMaintenanceMode();
String _binTitle = mm.getMessage("IBE_PRMT_WELCOME_G");
%>
<%@ include file="ibeCZzdBinTop.jsp" %>

<%=RequestCtx.getPersonName()%>

//...
<%
 if (shopCart != null) {
 out.println(mm.getMessage("IBE_PRMT_SC_TOTAL2"));
 }
%>
```



```

out.println(PriceObject.formatNumber(currencyCode,totalPrice));
 }
 else {
 out.println(mm.getMessage("IBE_SC_NOITMS_CART"));
 }
IBEUtil.log(J, "Shopping cart blurb end");
%>
//...
<%@ include file="ibeCZzdBinBottom.jsp" %>

<%
} // end if (! RequestCtx.userIsSalesRep())
%>

<%@ include file="ibeCWcpESIBinBottom.jsp" %>
<!-- ibeCAcdWelcome.jsp end -->

```

#### 33.4.4.4 Customize ESI Container Page

Out-of-box, Oracle iStore has two common section layout options (Fixed Layout and Configurable Layout). Both are ESI container pages. Therefore, in most cases, you do not need to customize ESI container page, unless:

1. You have a customized section layout page that needs to support Partial Web Cache.
2. You want to support Partial Web Cache page in some other Oracle iStore container pages, like Item Detail Page.

#### Steps

1. Include ibeCWcpESIContainer.jsp right after ibeCZzpHeader.jsp as below:

```

<%@ include file="ibeCZzpHeader.jsp" %>
<%@ include file="ibeCWcpESIContainer.jsp" %>
<%@ include file="ibeCWcpHeader.jsp" %>

```

2. Dynamically include the ESI bin page in the appropriate place. Replace MyEsiBinPage.jsp with your real ESI bin.jsp.

```
<jsp:include page="MyEsiBinPage.jsp" flush="true" />

```

**Example:** Only the code marked in bold is specific to ESI Container Page.

```
<%@include file="jtfincl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.jtft.base.Logger" %>
<%@page import="oracle.apps.ibe.displaymanager.*" %>
<%@ include file="ibeCZzpHeader.jsp" %>
<%@ include file="ibeCWcpESIContainer.jsp" %>
<%@ include file="ibeCWcpHeader.jsp" %>
<%
 String JSP_PAGE_NAME = "ibeCCtdCmnSt.jsp";
 int lSectionId = -1;
 String lSectionIdStr = "";
 String lPageTitleStr = "";
 Section lSection = null;

 String browsePage = "", pathPage = "", welcomePage = "",
 globalPage="";

 String lCenterDisplayPage = "";

 String lRhsBin1="", lRhsBin2="", lRhsBin3="",
 lRhsBin4="", lRhsBin5="",
 lRhsBin6="", lRhsBin7="";

 String lLhsBin1="", lLhsBin2="", lLhsBin3="",
 lLhsBin4="", lLhsBin5="",
 lLhsBin6="", lLhsBin7="";
```

```

 String lTopBin="", lBottomBin="";
 //...
 /* Welcome Bin */
 if(IBEUtil.useFeature("IBE_USE_WELCOME_BIN"))
 {
 welcomePage =
 DisplayManager.getTemplate("STORE_CUST_ACC_
WELCOME").getFileName();
 if (welcomePage == null)
 welcomePage = "";
 }
 //...
 <%-- welcome bin -----%>
 <%
 if(!welcomePage.equals(""))
 {
 IBEUtil.log(JSP_PAGE_NAME, "PERF: begin include
welcome page");
 IBEUtil.log(JSP_PAGE_NAME, welcomePage);
 }
 <jsp:include page="<%=welcomePage%>" flush="true"
 />

 <%
 }
 IBEUtil.log(JSP_PAGE_NAME, "PERF: end include welcome
page");
 }
 //...
 %>

```

```
<!-- ibeCCtdCmnSt.jsp end -->
```

#### 33.4.4.5 Post-Setup and Testing

After your customization, complete the following post-setup & testing steps:

1. Map your ESI bin page and ESI container page properly. Refer to [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), and [Section 8.10, "Configuring Bin Placement and Content"](#), for more information.
2. Test your pages when Oracle9iAS Web Cache server is not present.
3. Test your pages when Oracle9iAS Web Cache is enabled and the ESI bin is included in an ESI container page. (Skip this step if this scenario doesn't apply to your implementation.)
4. Test your customized pages when Oracle9iAS Web Cache is enabled and the ESI bin is included in a non-ESI container page. (Skip this step if this scenario doesn't apply to your implementation.)

## 33.5 Dynamic Page Cacheability for Section Configurable Layout

Oracle iStore enables you to dynamically set cacheability rules at runtime, by allowing a web-cacheable container page (the default Configurable Layout JSP, `ibeCCtdCmnSctLayout.jsp`) to change the cacheability of itself at runtime. This feature is available by default when you use Configurable Layout in your specialty sites. Configurable Layout uses `ibeCCtdCmnSctLayout.jsp`, which checks the cacheability of each included bin and then either caches the entire page content or not. See the following for more information:

- [Section 33.5.1, "Dynamic Page Cacheability Functional Flow"](#)
- [Section 33.5.2, "Implementing Dynamic Page Cacheability"](#)

### 33.5.1 Dynamic Page Cacheability Functional Flow

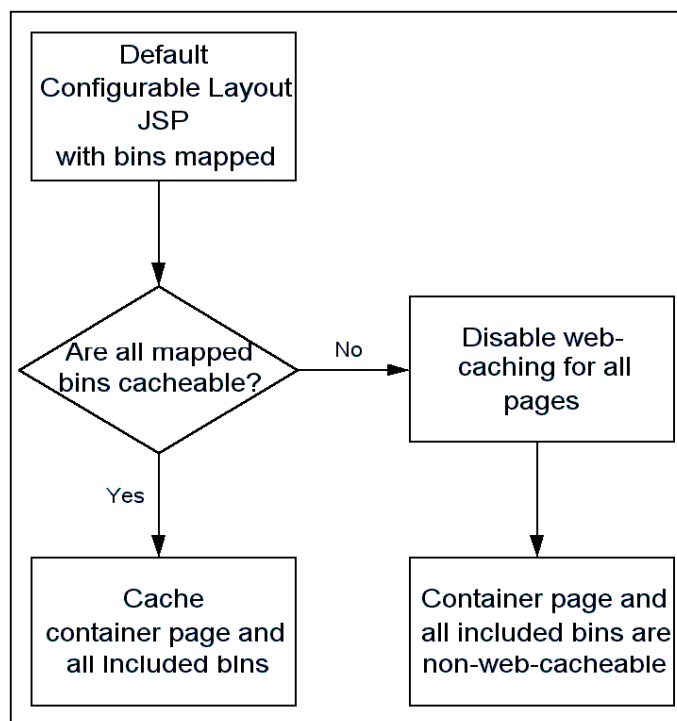
The following functional flow can aid your understanding of this feature.

1. Implementer maps content to appropriate bins and then configures the layout of the bins using Configurable Layout (See [Section 8.10, "Configuring Bin Placement and Content"](#)).
2. At runtime, the default Configurable Layout JSP, `ibeCCtdCmnSctLayout.jsp` (seeded for `STORE_SCT_CONFIGURABLE_LAYOUT` template, a container page), checks the cacheability of each of the bins mapped.

3. If all bins on the page are cacheable, the container page caches all bins.
4. If the page recognizes a bin as non-web-cacheable, the container page makes itself (and all mapped bins) non-web-cacheable. How the page does this is examined in the next section, [Section 33.5.2, "Implementing Dynamic Page Cacheability"](#).

The following graphic, [Figure 33–2, "Dynamic Page Cacheability Functional Flow"](#), depicts the flow.

**Figure 33–2 Dynamic Page Cacheability Functional Flow**



### 33.5.2 Implementing Dynamic Page Cacheability

By default, when it finds a bin that is non-web-cacheable, the seeded Configurable Layout JSP overwrites existing cacheability rules and disables the web-cacheability of the itself and all mapped bins. If you are using seeded bins and the Configurable

Layout option for sections, there are no implementation steps other than to map the bins (see [Section 8.10.5, "Using Configurable Bin Layout"](#)).

The seeded Configurable Layout JSP determines if a bin is web-cacheable by checking the programmatic access name of the bin template. If the access name ends with `_IBEWC`, the bin is not web-cacheable. Therefore, when using seeded or custom bins in Configurable Layout, consider the access name of each bin template.

### 33.5.2.1 How Configurable Layout JSP Disables Web-Cacheability

The process that the seeded Configurable Layout JSP page follows for disabling its own web-cacheability is:

1. The Configurable Layout JSP sets the `webcache` attribute to `disable` in the `pageContext`, and then includes the JSP, `ibeCWcpHeader.jsp`.
2. `ibeCWcpHeader.jsp` checks the `webcache` attribute value. If the value is `disable`, `ibeCWcpHeader.jsp` sets the Surrogate Control attribute of the HTTP response header to "no-store".

### 33.5.2.2 Cacheing Custom Bins with Configurable Layout

If using custom bins with Configurable Layout and you wish the bin content to be cacheable, ensure that programmatic access names do not end with `_IBEWC`. If the content of a bin is non-web-cacheable, and the bin does not support partial web cache, its access name should end with `_IBEWC`.

### 33.5.2.3 Code Example for Dynamic Page Cacheability

The following is an example of how the JSP code might look with this feature:

```
<% //check the web cacheability of each included bin, find at
least one of them is not web cacheable, then

pageContext.setAttribute("webcache", "disable",
PageContext.REQUEST_SCOPE); %>

<%@ include file="ibeCWcpHeader.jsp" %>
```

---

## Integrating Oracle iStore with Oracle Workflow

This chapter describes the integration of Oracle iStore 11i with Oracle Workflow to provide e-mail notifications of Customer UI events and Site Administration business reports.

Main topics in this chapter include:

- [Section 34.1, "Overview of Oracle Workflow"](#)
- [Section 34.2, "Oracle iStore Functionality with Oracle Workflow"](#)
- [Section 34.3, "Setting up Oracle iStore to Use Oracle Workflow Notifications"](#)
- [Section 34.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#)

### 34.1 Overview of Oracle Workflow

Business processes today involve getting many types of information to multiple people according to rules that are constantly changing. An integral part of Oracle Applications, Oracle Workflow lets you automate and continuously improve business processes, routing information of any type to people both inside and outside your enterprise according to business rules that you can easily change. Oracle Workflow does this by enabling e-mail notifications based on business event triggers.

For more information on Oracle Workflow, see *Oracle Workflow Guide* available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## 34.2 Oracle iStore Functionality with Oracle Workflow

Oracle iStore provides seeded workflows in which there are predefined notifications and notification messages. The iStore Alert Workflow (IBEALERT) contains the non-report-related notifications, while the report-related notifications belong to iStore Alert Reports (IBEECRRP).

Oracle iStore supports sending Workflow notifications in HTML and text formats, and seeds the message text for the seeded text format messages. Merchants can enable the HTML notifications at the workflow level based on their business requirements. In the Site Administration UI, merchants can select the HTML messages retrieved from Workflow, and map these to organization, user type, or site.

The notification e-mail messages are sent to users based on various events, including:

- User registration
- Login assistance requested
- Orders placed, cancelled, or returned
- Shared shopping cart actions
- Sales assistance requested
- Contracts actions
- Business reports actions

Notifications can be triggered by a site user (e.g., registration) or by the application itself (e.g., when an update message is scheduled for delivery). The e-mail messages include attributes (also called *tokens*) that are dynamically replaced with user-specific values -- such as the user's name -- when an e-mail is sent.

Notification events and messages are stored in Oracle Workflow data tables.

You can choose to use only the seeded messages for notifications. You can also create new messages using Oracle Workflow Builder. See [Section 34.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#), for more information.

After you have the messages that you need, you can use the default configurations of ALL users, ALL sites, and ALL organization, or you can select messages for notification events based on site, organization, or user type combinations, using the Oracle iStore Site Administration UI. See [Section 34.3.2.3, "Mapping New Notification Configurations"](#) for details.



## 34.2.1 Notifications Business Flow

The business flow of a typical notification event is:

1. Notification event occurs. (e.g., a user registers or requests to share a cart).
2. Oracle iStore selects the message for the notification, in some cases based on the recipient's organization and user type. (These are configurable parameters -- see [Oracle iStore Notification Events Configurable Parameters](#) in [Section 34.3.2.3, "Mapping New Notification Configurations"](#), for details.)
3. Oracle Workflow parses the message.
4. Oracle Workflow enters dynamic content into e-mail.
5. Oracle Workflow sends the message to the e-mail address of the user(s) involved in the event.

**Note:** Users must have a valid e-mail address stored in their registration data for the e-mail notifications to reach them.

## 34.2.2 Oracle iStore Seeded Notifications

Oracle iStore comes with seeded (supplied) Oracle Workflow notification events and messages. These are:

### 34.2.2.1 Notification Events Related to Orders

- [Order Confirmation - Normal](#)
- [Order Confirmation - Next steps for faxed orders](#)
- [Orders Not Booked Notification](#)
- [Cancel Order](#)
- [Return Order Confirmation \\*](#)
- [Return Order Approval Notification \\*](#)
- [Return Order Rejection Notification \\*](#)

\* -- New in this release

### 34.2.2.2 Notification Events Related to Shopping Cart/Quote Sharing

- [Generic Notification for Shared Carts \\*](#)
- [Shared Cart Notification](#)

- [Shared Quote Notification](#)
- [Change Access Level by Cart Owner](#)
- [Change Access Level by Quote Owner](#)
- [Remove Cart Access by Recipient](#)
- [Remove Quote Access by Recipient](#)
- [Stop Sharing by Cart Owner](#)
- [Stop Sharing by Quote Owner](#)

#### **34.2.2.3 Notification Events Related to Sales Assistance**

- [Sales Assistance Request - To Sales Representatives](#)
- [Sales Assistance Request - To Users](#)

#### **34.2.2.4 Notification Events Related to Users and Registration**

- [User Registration](#)
- [Forget Login](#)

See also: [Section 34.2.3, "Other Supported Notification Events for User Management"](#)

#### **34.2.2.5 Notification Events Related to Contracts**

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

#### **34.2.2.6 Notification Events Related to Reports**

- [Reports - iStore Historical Summary](#)
- [Reports - iStore Top Orders](#)

The following table, [Table 34–1, "Oracle iStore Seeded Notification Events"](#), describes all seeded Oracle iStore notification events. The table also lists their triggers and seeded recipients.

**Table 34–1 Oracle iStore Seeded Notification Events**

<b>Notification Name</b>	<b>Description</b>	<b>Recipients</b>	<b>Trigger</b>
<b>Notification Events Related to Orders</b>			
Order Confirmation - Normal	Confirms a normal order	User who places the order	User places an order in a web specialty site.
Order Confirmation - Next steps for faxed orders	Explains the remaining steps for order submission	User who places the order	User places an order and chooses to fax a credit card or purchase order as payment.
Orders Not Booked Notification	Announces that an order has not been booked.	Order administrator (profile option IBE: Default Order Admin to Send Workflow Notification.)	User's order is not booked.
Cancel Order	Confirms cancelled order	User who cancels order	User cancels order using the web specialty site.
Return Order Confirmation *	Confirms submitted return	User who submits return order request	User submits return order
Return Order Approval Notification *	Notifies of approved return. You can customize the message content to specify the return location where the company would like the return items to be shipped by the end customer.	User who submits return order request	User submits return order and it is approved
Return Order Rejection Notification *	Notifies of rejected return	User who submits return order request	User submits return order and it is rejected.
<b>Notification Events Related to Shared Shopping Carts</b>			

**Table 34–1 Oracle iStore Seeded Notification Events (Cont.)**

Notification Name	Description	Recipients	Trigger
Generic Notification for Shared Carts *	Notifies existing members (whose role did not get updated) and the owner (unless the owner initiated the action); contains a URL which takes members to shared cart	All existing members specified during sharing (Notify checkbox checked for these members)  Owner or administrator, when requesting sales assistance  Owner receives this notification when someone other than him (an administrator) requests sales assistance	User shares a cart or adds new members to an existing shared cart; or when owner or administrator requests sales assistance
Shared Cart Notification	Confirms new shared cart (or re-shared cart) event and explains how to access shared cart	Shared cart members (contains two messages -- one for B2B users, one for B2C users)  Owner gets Generic Notification when an administrator re-shares a cart	User shares a cart; or, a user re-shares a cart
Shared Quote Notification	Confirms shared (or re-shared) quote event and explains how to access shared quote	Shared cart members (contains two messages -- one for B2B users, one for B2C users)  Owner gets Generic Notification when an administrator re-shares a cart	User shares a quote; or, a user re-shares a quote

**Table 34–1 Oracle iStore Seeded Notification Events (Cont.)**

<b>Notification Name</b>	<b>Description</b>	<b>Recipients</b>	<b>Trigger</b>
Change Access Level by Cart Owner	Notifies users about access level changes	Shared cart members whose roles have changed  Members get a Generic Notification if their access level is not changed  Owner gets Generic Notification when an administrator changes the access level of members	Shared cart owner/administrator changes access level of member
Change Access Level by Quote Owner	Notifies users about access level changes	Shared quote members whose role has changed	Shared quote owner/administrator changes access level of member
Remove Cart Access by Recipient	Notifies users about shared cart status	Shared cart owner (members receive Generic Notification)	Shared cart recipient removes his own access to a shared cart
Remove Quote Access by Recipient	Notifies users about shared quote status	Shared quote owner (members receive Generic Notification)	Shared quote recipient removes his own access to a shared quote.
Stop Sharing by Cart Owner	Notifies users that a shared cart has been un-shared by the owner or administrator	Shared cart recipients	Shared cart owner /administrator stops sharing a shared cart.
Stop Sharing by Quote Owner	Notifies users that a shared quote has been un-shared by the owner or administrator	Shared quote recipients	Shared quote owner /administrator stops sharing a shared quote.
* = New in this release			
<b>Notification Events Related to Sales Assistance</b>			

**Table 34–1 Oracle iStore Seeded Notification Events (Cont.)**

<b>Notification Name</b>	<b>Description</b>	<b>Recipients</b>	<b>Trigger</b>
Sales Assistance Request - To Sales Representatives	Describes a request for sales assistance	<b>For shopping carts:</b> The sales representative specified in the quote header's resource ID  <b>For published quotes:</b> The sales representative who is the quote's primary sales agent.	User requests sales assistance.
Sales Assistance Request - To Users	Acknowledges a request for sales assistance	User	User requests sales assistance.
<b>Notification Events Related to Users and Registration</b>			
User Registration	Welcomes a newly registered user after approval	User (contains three messages -- one for B2C users, one for B2B regular users, and one for B2B primary users)	B2C user registers, B2B regular user registers and is approved, B2B primary user registers
Forget Login	Tells user his username and password	User	Registered user requests login information.
<b>Notification Events Related to Contracts</b>			
Contract Negotiations Request - Disapproval	Announces rejection of a contract terms change request	Contract sales representative for the user's operating unit	Contract administrator rejects user's request for changes in contract terms.
Contract Negotiations Request - To Sales Representatives	Describes a request for changes to contract terms	Contract sales representative for the user's operating unit	User requests changes in contract terms.
Contract Negotiations Request - Approval	Announces approval of a contract terms change request	User Contract sales representative for the user's operating unit	Contract administrator approves user's request for changes in contract terms.
Contract Negotiations Request - Cancellation	Announces cancellation of contract negotiations	User Contract sales representative for the user's operating unit	Contract administrator cancels contract that was created when a user requested changes in contract terms.

**Table 34–1 Oracle iStore Seeded Notification Events (Cont.)**

Notification Name	Description	Recipients	Trigger
Contract Negotiations Request - To Users	Acknowledges a request for changes to contract terms	User	User requests changes in contract terms.
<b>Notification Events Related to Reports</b>			
Reports - iStore Historical Summary	Contains the information from the Store Order Summary Data Out Bin	Users specified in the Site Administration UI under Reports > Email Preferences	iStore Reports concurrent programs refresh the report data.
Reports - iStore Top Orders	Contains daily Top Orders from the Top Orders Bin; does not show data for other time periods, such as week, month, etc.	Users specified in the Site Administration UI under Reports > Email Preferences	iStore Reports concurrent programs refresh the report data.

### 34.2.3 Other Supported Notification Events for User Management

The following notifications events which use Oracle CRM Foundation workflows are supported for user management when users register through Oracle iStore:

- Notify Users of Pending Approval
- Notify Users of Approval
- Approved User
- Rejected User
- Request of enrollment approval
- Request of registration approval
- Enrollment approved
- Enrollment rejected
- Remind of user type approval request
- Remind of enrollment request

See [Section 34.2.2, "Oracle iStore Seeded Notifications"](#), for the user management notifications owned by Oracle iStore. See *Oracle Common Application Components Implementation Guide* for information about Oracle CRM Foundation notifications.

## 34.3 Setting up Oracle iStore to Use Oracle Workflow Notifications

This chapter is limited to information specific to implementing Oracle iStore's Oracle Workflow notification events. For further details, please refer to the *Oracle Workflow Guide* available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Limited information about customizing notifications is also presented here, in [Section 34.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#).

This section contains:

- [Section 34.3.1, "Setting up Oracle iStore to Use Workflow Notifications - Required Steps"](#)
- [Section 34.3.2, "Setting up Oracle iStore to Use Workflow Notifications - Optional Steps"](#)

### 34.3.1 Setting up Oracle iStore to Use Workflow Notifications - Required Steps

In addition to the Oracle-Workflow-specific setups documented in the *Oracle Workflow Guide*, you must set the profile option, HZ: Execute API Callout, to Yes, in order to synchronize Oracle TCA data with Oracle Workflow user data. If this profile is not turned enabled, Workflow will not have required user details, and notifications -- even though generated -- will not be sent. See the Oracle TCA documentation for additional details.

### 34.3.2 Setting up Oracle iStore to Use Workflow Notifications - Optional Steps

The following are the optional steps to activate the Oracle Workflow integration with Oracle iStore:

- [Section 34.3.2.1, "Setting Default Administrator for Orders Errors"](#)
- [Section 34.3.2.2, "Setting up Sales Representative Recipients"](#)
- [Section 34.3.2.3, "Mapping New Notification Configurations"](#)
- [Section 34.4, "Customizing Oracle iStore-Oracle Workflow Integration"](#)

#### 34.3.2.1 Setting Default Administrator for Orders Errors

To specify a default username to receive a notification each time an error occurs during the ordering process, set the profile option, IBE: Default Order Admin to Send Workflow Notification. See [Section A.12.0.110, "IBE: Default Order Admin to Send Workflow Notification"](#), for more information.



### 34.3.2.2 Setting up Sales Representative Recipients

Several Oracle iStore notifications are sent to sales representatives and contract sales representatives. If you are integrating with the Oracle applications whose users are primarily sales representatives -- including Oracle Sales Contracts, Oracle Sales Online, and Oracle Quoting -- you must specify the sales representatives and contract sales representatives who receive notifications. Refer to the specific product documentation for further details. See [Section 14.2.1, "Sales Assistance Business Flow"](#), for information about this business flow.

### 34.3.2.3 Mapping New Notification Configurations

Oracle iStore ships with the seeded notification events described in [Section 34.2.2, "Oracle iStore Seeded Notifications"](#). For any notification event, if you have not set up a message for a specific site, organization, or user type, Oracle iStore uses the default message, mapped to ALL sites, organizations, or user types.

When mapping new configurations, three parameters can be used to determine the mapping:

- **Site** --- The list of values for Site includes all sites in your implementation.
- **Organization** --- The organization is determined by the setting of the profile option **MO: Operating Unit** at the responsibility level to a username. See [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#), for more information.
- **User type** -- The user type is determined during registration by the Oracle CRM Technology Foundation User Management Framework. Default values are:
  - Register as individual (B2C Individual User)
  - Register your organization (primary B2B user)
  - Register as a user of an existing company (regular B2B user)

If integrating with Oracle Partner Management, you must set up the user types: Register your partner organization and Register as user of your partner organization. See [Section 27.2.9.1, "Enable Partner Management User Types"](#), for details.

**Important:** Oracle iStore does not allow customization of notification events. Customers can only customize the notification messages. See the *Oracle Workflow Guide* for details.

The following table shows sample message configurations for the notification Order Confirmation - Normal.

**Table 34–2    Sample Configurations for the Notification Order Confirmation - Normal**

Organization	User Type	Message
All	All	Message 1 (default)
All	Register as a user of an existing company	Message 2
Organization A	All	Message 3
Organization A	Register as individual	Message 4

When Oracle iStore sends a notification, it chooses the message with the parameters that match the user’s data most closely, or it selects the default configuration.

For example, with the message configuration listed in [Table 34–2, "Sample Configurations for the Notification Order Confirmation - Normal"](#), an individual user who places an order against Organization A receives Message 4, not Message 1 or Message 3.

If more than one message applies to the user, the user’s organization takes precedence over the user type. For example, with the message configuration listed in [Table 34–2, "Sample Configurations for the Notification Order Confirmation - Normal"](#), a business user who places an order against Organization A receives Message 3, not Message 2.

Organization, user type, and site are not relevant to certain notifications. In such cases:

- You cannot map notification configurations for organization, user type, or site.
- Pull-down menus from which you would normally choose organization or user type display as read-only fields.

**Oracle iStore Notification Events Configurable Parameters**

The following table, Configurable Parameters for Oracle iStore Notification Events, shows a list of notification events and their configurable parameters.

**Table 34–3    Configurable Parameters for Oracle iStore Notification Events**

Notification Event	Store	Org.	User Type
Cancel Order	No	Yes	Yes
Change Access Level by Cart Owner	Yes	Yes	Yes

**Table 34–3 Configurable Parameters for Oracle iStore Notification Events (Cont.)**

<b>Notification Event</b>	<b>Store</b>	<b>Org.</b>	<b>User Type</b>
Change Access Level by Quote Owner	Yes	Yes	Yes
Contract Negotiations Request - Approval	No	Yes	Yes
Contract Negotiations Request - Cancellation	No	Yes	Yes
Contract Negotiations Request - Disapproval	No	Yes	No
Contract Negotiations Request - To Sales Representatives	No	Yes	No
Contract Negotiations Request - To Users	No	Yes	Yes
Forget Login	Yes	Yes	Yes
Order Confirmation - Next steps for faxed orders	No	Yes	Yes
Order Confirmation - Normal	No	Yes	Yes
Orders Not Booked Notification	No	No	No
Remove Cart Access by Recipient	Yes	Yes	Yes
Remove Quote Access by Recipient	Yes	Yes	Yes
Reports - iStore Historical Summary	No	No	No
Reports - iStore Top Orders	No	No	No
Return Order Confirmation	Yes	Yes	Yes
Return Order Approval	No	Yes	Yes
Return Order Rejection	No	Yes	Yes
Sales Assistance Request - To Sales Representatives	No	Yes	No
Sales Assistance Request - To Users	No	Yes	Yes
Share Cart Notification	Yes	Yes	Yes
Share Quote Notification	Yes	Yes	Yes
Stop Sharing by Cart Owner	Yes	Yes	Yes
Stop Sharing by Quote Owner	Yes	Yes	Yes
User Registration	No	Yes	Yes

#### 34.3.2.4 Steps to Map New Configurations

Use the following procedure to add message configurations for notification events according to site, organization, or user type. For a list of seeded notification events, see [Section 34.2.2, "Oracle iStore Seeded Notifications"](#).

##### Prerequisites

- Perform the required tasks in [Section 34.3.1, "Setting up Oracle iStore to Use Workflow Notifications - Required Steps"](#).

##### Steps

1. Log in to the Site Administration UI. In the Advanced tab, select the Notifications subtab. The Notification Events page opens with a list of existing Notification Events.
2. Select the Details icon for the notification event that you want to modify or copy. The Notification Event Details page opens, displaying the default, seeded configuration for this notification event and any other configurations that have been created.
  - Optionally, you can remove a notification configuration: (1) Activate the Select checkbox of the appropriate configuration; and (2) press the **Delete** icon.
  - Optionally, you can disable/enable a configuration by selecting the notification configuration and selecting the Enable or Disable button.
  - You also can update Notification Configurations: (1) Activate the Select checkbox of the appropriate configuration; and (2) press the Update icon. In the Update Configuration page that appears, make your desired changes and then press Apply to save changes.
3. In the Notification Event Details page, select the Add Notification Configuration button. The Add Configuration page appears, with LOV menus for the following (the drop-list for these parameters will only be available if you can map the notification event at that level):
  - **Organization** --- Select the organization to map the event to. You must have more than one organization set up to enable this feature. See [Chapter 17, "Implementing Globalization and Multi-Org Architecture"](#), for more information.
  - **User Type** --- Select the user type to map the event to. For information on user types, see [Section C.7, "Site Management User Type Definitions"](#), and

the user management section of the *Oracle Common Application Components Implementation Guide*.

- **Site** --- Select the site to which to map the event.
4. Select Apply to save changes. If an identical configuration already exists, the application will return an error.

## 34.4 Customizing Oracle iStore-Oracle Workflow Integration

You can choose to use only the seeded messages for Oracle iStore notifications. If you want to create additional messages, you can use the planning steps below to assist you:

- Decide the number of organizations that you will have.
- Decide what the content of the default messages, if any, should be.
- Decide exactly what combinations of organizations and user types need messages that are different from the defaults.
- Decide what the content of the non-default messages should be.

If you are upgrading Oracle iStore and have customized Workflow messages, then you must do the following:

- Back up any necessary customized messages and remove the access locks from the messages and items of the Oracle iStore-related Oracle Workflow definition, so that the upgrade can overwrite the Oracle Workflow definition. See [Section 20.12, "Notifications Errors"](#) for details.

### 34.4.1 Creating Messages

Use Oracle Workflow Builder to create and edit messages for Oracle iStore notifications. The Oracle Workflow item type iStore Alerts Workflow (IBEALERT), in the data store file IBENOTIF.wft, contains all Oracle iStore notifications and their messages and attributes, except for the notifications Summary Report and Top N Orders Report. The item type iStore Alert Reports (IBEECRRP), in the data store file IBEVWFR.wft, contains the notifications Historical Summary Report and Top N Orders Report.

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**Note:** Do not modify the seeded messages. Changes to the seeded messages will be overwritten when you apply patches. Instead, copy the seeded messages into new messages, then modify the new messages.

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Each message's internal name must begin with a prefix that associates it with an Oracle iStore notification event. The following table lists the message prefix for each notification event. See [Section 34.2.2, "Oracle iStore Seeded Notifications"](#) for descriptions of the notification events.

**Table 34–4 Seeded Message Template Names for Oracle iStore Notifications**

Notification Event	Message Template Name
Cancel Order	CANCELODER
Change Access Level by Cart Owner	CHANGEACCESSLEVEL
Change Access Level by Quote Owner	CHANGEACCESSLEVEL_QUOTE
Contract Negotiations Request - Approval	TERMAPPROVEDNOTIF
Contract Negotiations Request - Cancellation	TERMCANCELLEDNOTIF
Contract Negotiations Request - Disapproval	TERMREJECTEDNOTIF
Contract Negotiations Request - To Sales Representatives	SALESQUOTENOTIFICATION
Contract Negotiations Request - To Users	CUSTQUOTENOTIFICATION
Forget Login	FORGETLOGINNOTIFICATION
Order Confirmation - Next steps for faxed orders	ORDFAXNOTIFICATION
Order Confirmation - Normal	ORDCONFNOTIFICATION
Orders Not Booked Notification	ORDNOTBOOKEDNOTIFICATION
Remove Cart Access by Recipient	ENDWORK
Remove Quote Access by Recipient	ENDWORK_QUOTE
Reports - iStore Historical Summary	IBE_ECR_SUMM_ALERT
Reports - iStore Top Orders	IBE_ECR_TOPORD_ALERT
Return Order Confirmation - B2B user	IBE_RETURNORDERCONF_B2B
Return Order Confirmation - B2C user	IBE_RETURNORDERCONF

**Table 34–4 Seeded Message Template Names for Oracle iStore Notifications (Cont.)**

Notification Event	Message Template Name
Return Order Approval	IBE_RETURNORDERAPPROVED
Return Order Rejection	IBE_RETURNORDERREJECT
Sales Assistance Request - To Sales Representatives	SALESASSISTNOTIFICATION
Sales Assistance Request - To Users	CUSTASSISTNOTIFICATION
Share Cart Notification	SHARECARTNOTIF
Share Quote Notification	SHAREQUOTENOTIF
Stop Sharing by Cart Owner	STOPWORKING
Stop Sharing by Quote Owner	STOPWORKING_QUOTE
User Registration	ACCTREGNOTIFICATION

Oracle Workflow replaces attributes in messages dynamically with user-specific values when it sends a notification. The following table lists the iStore Alerts Workflow attributes.

**Table 34–5 Attributes for the Item Type iStore Alerts Workflow**

Display Name	Internal Name	Description	Type
First Name	FIRSTNAME	User's first name	Text
Last Name	LASTNAME	User's last name	Text
Login Name	LOGINNAME	User's login name	Text
Password	PASSWORD	User's password	Text
Email Address	EMAILADDRESS	User's e-mail address	Text
Event Type	EVENTTYPE	Notification event type	Text
Send To	SENDTO	Recipient's e-mail address	Text
Quote Id	QUOTEID	Quote ID	Number
Quote Name	QUOTENAME	Quote name	Text
Quote Detail with tax	QUOTEDETAILWITHTAX	Quote detail with tax information	Document
Quote detail without tax	QUOTEDETAILWOUTTAX	For quote line details with tax info	Document

**Table 34–5 Attributes for the Item Type iStore Alerts Workflow (Cont.)**

<b>Display Name</b>	<b>Internal Name</b>	<b>Description</b>	<b>Type</b>
Contract Number	CONTRACTNO	Contract number	Number
Order Detail	ORDERDETAIL	Order detail	Document
Order Detail without tax	ORDERDETAILWOUTTAX	Order detail without tax	Document
Order Detail with tax	ORDERDETAILWTAX	For order detail with line level tax info	Document
Order Header	ORDERHEADER	Order header	Document
Order Footer	ORDERFOOTER	Order footer	Document
Error Message	ERRMSG	Error message	Text
Comments	COMMENTS	User's comments	Text
Order Header ID	ORDERID	Order header ID	Number
Item Key	ITEMKEY	Item key	Text
Quote Number	QUOTENUM	Quote number	Number
Cart Version	QUOTEVER	Cart version/quote version	Number
URL	URL	URL (e.g., a shared cart link)	Text
Sharee Number	SHNUM	Shared cart recipient number	Text
Message Name	MESSAGE	Message name	Text
Requester Name	REQ_NAME	Requester name	Text
Requester First Name	REQ_F_NAME	Requester first name	Text
Requester Last Name	REQ_L_NAME	Requester last name	Text
Person Title	PERSON_TITLE	Person title	Text
Contact Phone	CONTACTPHONE	Contact phone	Text
Cart Name	CARTNAME	Cart name	Text
Cart Date	CARTDATE	Cart date	Text
Ship Method	SHIPMETHOD	Ship method	Text
Ship-to Name	SHIPTONAME	Ship-to name	Text



**Table 34–5 Attributes for the Item Type iStore Alerts Workflow (Cont.)**

Display Name	Internal Name	Description	Type
Ship-to Address	SHIPTOADDRESS	Ship-to address	Text
Specialty Store Name	MSITENAME	Specialty site name	Text
Reason	REASON	Reason code for sales assistance request	Text
Order Number	ORDERNUMBER	Order number	Text
Contact Name	CONTACTNAME	Contact name	Text
Context Message	CONTEXT_MESSAGE	Context Message	Text
Access Level	ACCESSLEVEL	Access Level	Text
Old Access Level	OLDACCESSLEVEL	Old Access Level	Text
Update Message	UPDATEMSG	Update Message	Text
Retrieve Message	RETRIEVEMSG	Retrieve Message	Text
Order Detail Header	ORDERDTLHEADER	Order Detail Header	Document
Permission to view net price	VIEWNETPRICE	Permission to view net price	Text
Store User Type	STOREUSERTYPE	Store User Type	Text

The item type iStore Alert Reports has a different set of attributes, listed in the following table.

**Table 34–6 Attributes for the Item Type iStore Alert Reports**

Display Name	Internal Name	Description	Type
Report Frequency	FREQUENCY	Report frequency, e.g., DAY, MONTH	Text
Report Scale	SCALE	Report amount scale	Number
Currency Code	CURRENCY	Currency code	Text
Number of Rows	NUMROW	Number of rows	Number
Report Subject	REPORT_SUBJECT	Report subject	Text
Document Identifier	DOCUMENTID	Document identifier	Text
Report Body	REPORT_BODY	Report body	Text

**Table 34–6 Attributes for the Item Type iStore Alert Reports (Cont.)**

Display Name	Internal Name	Description	Type
Bin Refresh Date	BIN_DATE	Bin refresh end date	Text
Table of Contents	TOC	Table Of Contents	Document
Request Server	REQ_SERVER	Request Server URL	Document
Style Sheet	STYLE_SHEET	Style Sheet for Alert Reports	Document
Day Reports	REPORT_DAY_BODY	Day Reports	Document
iStore Shopping Cart Summary	IBE_ECR_BIN_SUMM_CARTS	iStore Shopping Cart Summary	Document
Global Week Detail Reports	REPORT_WEEK_BODY	Global Week Detail Reports	Document
Global Month Detail Reports	REPORT_MONTH_BODY	Global Month Detail Reports	Document
Global Quarter Detail Reports	REPORT_QUARTER_BODY	Global Quarter Detail Reports	Document
Global Year Detail Reports	REPORT_YEAR_BODY	Global Year Detail Reports	Document

Use the following procedure to create customized Oracle Workflow messages for the Oracle iStore notifications.

### Steps

1. Create a new message using Oracle Workflow Builder, and name it with the appropriate prefix for the notification event, as listed in [Table 34–4, "Seeded Message Template Names for Oracle iStore Notifications"](#).
2. Copy the message attributes from the seeded message for the notification event to the new message.
3. Modify the message text as necessary.
4. Restart the Java Virtual Machine (JVM) to refresh the cache objects.
5. You can now map this message to its notification by organization and user type. See [Section 34.3.2.3, "Mapping New Notification Configurations"](#) for more information.

See *Oracle Workflow Guide* for more information on working with messages.





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## Profile Options

This chapter describes profile option settings that are required for successful implementation and administration of Oracle iStore 11i.

Main topics in this chapter include:

- [Section A.1, "Before You Begin"](#)
- [Section A.2, "How to Set Profile Options"](#)
- [Section A.3, "Oracle CRM Technology Foundation Profile Options"](#)
- [Section A.4, "Concurrent Program Manager Profile Options"](#)
- [Section A.5, "Site Administration UI Setup Profile Options"](#)
- [Section A.6, "Customer UI Mandatory Setup Profile Options"](#)
- [Section A.7, "Other Customer UI Profile Options"](#)
- [Section A.8, "Customer UI Pricing Profile Options"](#)
- [Section A.9, "Customer UI Product Search Profile Options"](#)
- [Section A.10, "Reports Profile Options"](#)
- [Section A.11, "Lead Import Profile Options"](#)
- [Section A.12, "Oracle Workflow \(E-mail Notifications\) Integration Profile Options"](#)
- [Section A.13, "Caching and SSL Profile Options"](#)
- [Section A.14, "Oracle Order Capture/Oracle Quoting Integration Profile Options"](#)
- [Section A.15, "Oracle Configurator/Bills of Material Integration Profile Options"](#)
- [Section A.16, "Oracle Content Manager Integration Profile Options"](#)

- [Section A.17, "Oracle Marketing Integration Profile Options"](#)
- [Section A.18, "Unsupported Profile Options"](#)

## A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh <APPS username>/APPS password> start`.

## A.2 How to Set Profile Options

Use the following procedure to set any profile option.

**Note:** As a best practice, use the highest level setting for profile options, when possible. For example, if a profile option can be set at site, application and responsibility levels, you should set it at the highest level that your business needs can tolerate.

### Steps

1. Log in to Oracle Forms with the System Administrator responsibility and select Profile > System. The Find System Profile Values window opens.
2. Check the level(s) at which you want to set the profile option:
  - **Site** (highest level)
  - **Application**—If you select this level, choose the application from the Application LOV for which you want to set the profile option.
  - **Responsibility**—If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.
  - **User**—If you select this level, choose the user from the User LOV for whom you want to set the profile option.
3. In the Profile field, enter the profile name, such as `IBE: Item Validation Organization`, or a wildcard search criterion such as `IBE%`.
4. Click Find. The System Profile Values form opens with the results of your search.
5. Verify or set the profile option(s) at the levels that you selected.

6. Bounce the Apache server after making profile option changes.

See *Oracle Applications System Administrator's Guide* for more information.

### A.2.1 Finding Application and Responsibility ID Values

You must know the APPLICATION\_ID values and RESPONSIBILITY\_ID values for site administrator (manager) and customer responsibilities before you can set the required Oracle CRM Technology Foundation (JTT) profile options for users with these responsibilities.

- The Application ID for Oracle iStore is always 671.
- The Responsibility ID for the iStore Administrator is 21819, and for the IBE\_CUSTOMER responsibility, 22372.

If you need to find additional application or responsibility ID numbers, use the following procedure:

#### Steps

1. Log in to Oracle Forms with the System Administrator responsibility and select Security > Responsibility > Define. The Responsibilities form opens.
2. Choose View > Find. Search for the responsibility, highlight it, and select OK in the search window. The Responsibilities form is populated with the record for the responsibility that you chose.
3. With your cursor in any field of the record, choose Help > Diagnostics > Examine. The Examine Field and Variable Values window opens.
4. In the Examine Field and Variable Values window, choose APPLICATION\_ID from the Field LOV. The Value field in the Examine Field and Variable Values window is populated with the value of APPLICATION\_ID.
5. In the Examine Field and Variable Values window, choose RESPONSIBILITY\_ID from the Field LOV. The Value field in the Examine Field and Variable Values window is populated with the value of RESPONSIBILITY\_ID.

See *Oracle Applications System Administrator's Guide* for more information.

## A.3 Oracle CRM Technology Foundation Profile Options

This section summarizes the Oracle CRM Technology Foundation profile options that you need to set when implementing Oracle iStore.

**Note:** The product code for the Oracle CRM Technology Foundation is JTT. Previously it was JTF, and the application retains the JTF code for its profile options. See the *Oracle Applications CRM System Administrator's Guide* for additional information.

This section includes:

- [Section A.3.1, "Foundation Profile Options for HTML UI Setup"](#)
- [Section A.3.2, "Foundation Profile Options for iStore Administrator User"](#)
- [Section A.3.3, "Foundation Profile Options for Guest User"](#)

## A.3.1 Foundation Profile Options for HTML UI Setup

Set the profile options in this section at the following levels:

- **Site**
- **Application**—iStore (where noted)

For more information, see [Section 4.1.1, "Set Initial Profile Options"](#).

### A.3.1.1 FND: Branding Size

Controls the size of the navigation icons in the Site Administration and Customer UIs. Set at site level. Following are the settings and UI impact for the navigation icons.

- **Regular** --- This setting renders full navigation icons (buttons) in the customer-facing and merchant-facing user interface (see [Section 6.4.8, "Navigation Icons"](#), for information on the Customer UI icons).
- **Medium** --- Navigation icons display as links with the small store logo, if a logo file has been mapped to the template, STORE\_LOGO\_MAIN. If the STORE\_LOGO\_MAIN template is not mapped, no icons will display.
- **Small** --- Navigation icons display as links with the small store logo, if a logo file has been mapped to the template, STORE\_LOGO\_MAIN. If the STORE\_LOGO\_MAIN template is not mapped, no icons will display.

**Note:** This profile option also determines the style sheet used for the HTML user interface, if using a customized style sheet. See [Section D.11, "Customizing the Style Sheet"](#), for information.

### A.3.1.2 JTF\_PROFILE\_DEFAULT\_APPLICATION

Specifies the default application ID. Set to 671 for Oracle iStore.



**A.3.1.3 JTF\_PROFILE\_DEFAULT\_BLANK\_ROWS**

Specifies the number of blank rows on Site Administration UI forms. Can be set to any integer greater than zero.

**A.3.1.4 JTF\_PROFILE\_DEFAULT\_CSS**

Specifies the default Oracle CRM Technology Foundation Cascading Style Sheet. Set to jtfucss.css.

**A.3.1.5 JTF\_PROFILE\_DEFAULT\_CURRENCY**

Specifies the default currency. Enter the currency code in all uppercase letters. USD = U.S. Dollars.

**A.3.1.6 JTF\_PROFILE\_DEFAULT\_NUM\_ROWS**

Specifies the default number of rows to display in tables. Can be set to any integer greater than zero.

**A.3.1.7 JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY**

Specifies the default responsibility for the Site Administration UI. Set to 21819 for the iStore Administrator responsibility. Set at iStore application level only.

**A.3.2 Foundation Profile Options for iStore Administrator User**

Set the profile options in this section at the following levels:

- **User**—Site administrator/manager user name

For more information, see:

- [Section 4.1.2, "Set up Administrators"](#)

**A.3.2.1 JTF\_PROFILE\_DEFAULT\_APPLICATION**

Specifies the default application ID. Set to 671 for Oracle iStore.

**A.3.2.2 JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY**

Specifies the default responsibility for the Site Administration UI. Set to 21819 for the iStore Administrator responsibility.

### A.3.3 Foundation Profile Options for Guest User

Set the profile options in this section at the user level to the guest user name. For more information, see [Section 4.2.1, "Set up Guest User Access"](#).

#### A.3.3.1 JTF\_PROFILE\_DEFAULT\_APPLICATION

Specifies the default application ID. Set to 671 for Oracle iStore.

#### A.3.3.2 JTF\_PROFILE\_DEFAULT\_RESPONSIBILITY

Specifies the default responsibility for the guest user's responsibility. Set to 22372 for the IBE\_CUSTOMER responsibility. If implementing additional customer responsibilities, follow the steps in [Section A.2.1, "Finding Application and Responsibility ID Values"](#), to find the responsibility IDs of the additional responsibilities.

## A.4 Concurrent Program Manager Profile Options

Set the following profile options at responsibility level to the iStore Concurrent Programs Responsibility and any other Oracle iStore concurrent program manager responsibility being used. Generally, set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE\_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.

- ASO: Default Order Type -- Set to Mixed.
- ASO: Validate Salesrep -- Set to No.

## A.5 Site Administration UI Setup Profile Options

Set the profile options in this section at the iStore application level, unless otherwise directed.

#### A.5.0.3 IBE: Category Set

This profile is used in:

- Category-based product search in Site Administration UI
- Determining the default item display style if no item-level display is mapped in Customer UI

- Defining product relationship rules between category to product, category to section, or category to category.

Mandatory profile option. Set at iStore application level to the primary display category set. See [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#).

#### **A.5.0.4 IBE: Enable Display Style**

Specifies whether Display Styles functionality shows up in the Site Administration UI. If set to Yes, Display Styles can be selected in the Display Templates pages for Products and Sections; also, new Display Styles can be created in the Template Manager subtab within the Advanced tab. If set to No, the functionality is not available. Default value = Null. Null is treated as No.

#### **A.5.0.5 IBE: Item Validation Organization**

Specifies the Inventory Organization where your sites' products reside. See [Section 7.1, "Products in Oracle iStore Overview"](#).

Mandatory profile option. Recommended value: Master Inventory Organization, unless you are implementing multiple organizations; in that case, see: [Section 17.3, "Implementing Globalization with Oracle iStore"](#). If integrating with Oracle Marketing's Products module, see [Section 26.4, "Implementing Oracle Marketing Products Integration"](#).

#### **A.5.0.6 IBE: Use Database for Media Storage**

Enables/disables file upload functionality in the Content tab of the Site Administration UI. Yes = Upload functionality available. No = Upload Functionality not available. Default = No. Set at site level. See [Section 9.4.2, "Understanding IBE: Use Database for Media Storage"](#).

#### **A.5.0.7 IBE: Use Display Order Feature**

Specifies whether you can manually order the display of specialty sites in the Site Selection Page. If set to Yes, you can determine the specialty site order using the Sites: Display Order page in the Site Administration UI. If set to No, specialty sites will be arranged in case-insensitive, alphabetical order at runtime. Default = Yes. Can be set at site and application levels. Note that Oracle iStore does not support setting different levels for this profile option at site and application level. If you have set this profile option at application level, it is recommended that you unset the application-level setting and set the profile at site level.

## A.6 Customer UI Mandatory Setup Profile Options

Set the following mandatory IBE profile options for the Customer UI. Set the profile options in this section at the iStore application level, unless otherwise specified.

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

### A.6.0.8 ASO: Automatic Numbering

Necessary for placing orders in Oracle Order Management. Set to Yes at site and responsibility levels.

### A.6.0.9 ASO: Credit Card Authorization

Enables/disables online credit card authorization when an order is created. Possible values: Yes/No. Default = Null (treated as No).

Note: There are two places where online credit card payment authorization can happen: the iStore API call and the Order Capture API call. The iStore API call is not supported, and so the IBE profile that controls credit card payment authorization should be set to Yes at all levels (to turn it off), whether or not you want to use online authorizations. It is the Order Capture (ASO) profile option for credit card authorization that should be used to turn online authorization on or off.

### A.6.0.10 ASO: Default Order State

Specifies the default order state. Possible values: Booked/Entered. Recommended value = Booked.

### A.6.0.11 ASO: Default Order Type

Determines how an order is to be processed in Oracle Order Management. Order types (ORDER\_CATEGORY\_CODE internal name) restrict the types of lines on an order. Recommended value = Mixed. Can also be set at site and responsibility levels. See the *Oracle Order Management Suite Implementation Guide* for more details.

### A.6.0.12 ASO: Default Quote Status

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

**A.6.0.13 ASO: Enable TCA Changes**

Required for address validation in the Trading Community Architecture schema. It is used, for example, when a user attempts to split billing and shipping contacts in the Customer UI. Set to Yes.

**A.6.0.14 ASO: OM Defaulting**

Determines whether OM uses default values for certain cart attributes if null values are passed. See [Section 2.10, "Setting up Oracle Order Management"](#), for more information.

**A.6.0.15 IBE: Create Order in Entered State, if it has errors while booking**

Specifies if an order should be created in the Entered state even if there are errors while booking it. Possible values - Yes/No. Set to Yes. Default = No.

**A.6.0.16 IBE: Default Payment Term**

Set to the payment term that will be the default payment term for orders. Payment terms are set in Oracle Receivables. See *Oracle Receivables User Guide* for more information.

**A.6.0.17 IBE: Pricing Event--Before Shopping Cart**

Specifies the user-defined pricing event (defined in Pricing) for the catalog stage. Set to `Enter Order Line`.

**A.6.0.18 IBE: Pricing Event for Shopping Cart**

Specifies the pricing event for processing the shopping cart price in Oracle Pricing. You must set the profile option to `Batch Processing` to ensure that the price lists, modifiers, discounts, promotion codes, and surcharges are applied correctly at both header and line level.

**A.6.0.19 MO: Operating Unit**

Specifies the operating unit against which Customer UI users place orders. The user can only view and purchase items that are in the Inventory Organization associated with this operating unit. Set to the default operating unit at the customer responsibility level.

#### **A.6.0.20 Sequential Numbering**

Without this profile you cannot place orders in the site using that responsibility. (The name of this profile option has no product code prefix.) Set to `Always Used` at site level. The value can also be `Partially Used`. You also need to set this profile option at the responsibility level, if you are using different responsibilities than `IBE_CUSTOMER` in the site definition.

## **A.7 Other Customer UI Profile Options**

All of these profile options are optional. Set at iStore application level unless otherwise directed.

#### **A.7.0.21 IBE: Active Cart Expiration Duration (# days)**

Specifies the number of days that customers can access active shopping cart before they expire. The expiration date is calculated from the last update date of the cart, and carts expire at the end of the day they on which they are scheduled to expire. Default = 30. Set to any integer.

#### **A.7.0.22 IBE: Additional Shopping Cart Information**

Enables/disables Additional Information link and related functionality in the Your Shopping Cart page. The Additional Information section captures information from the customer via descriptive flexfields. Possible values - Yes/No. Default = No. Can be set at site or responsibility levels. See [Section D.2, "Descriptive Flexfield Support"](#).

#### **A.7.0.23 IBE: Additional Table Rows**

Determines the number of rows to add when a user selects the Add More Rows button in the Direct Item Entry form in the Customer UI. Default = 1. Set to an integer.

If not set, this profile defaults to 1. It can be set at the site, application, and responsibility levels. If set to 0, the Add Rows button is not displayed.

#### **A.7.0.24 IBE: Attachment Document Category**

Necessary for allowing B2B customers to attach files to shopping carts. Recommended value = `Miscellaneous` at iStore application level. Default = `Null`. Ensure that the user has the `IBE_USE_ATTACHMENTS` permission in his user role. B2C users do not have access to the attachments functionality.

**A.7.0.25 IBE: Cart Retrieval By Number For B2B**

Required for shared cart backward compatibility purposes; enables a textbox (labelled Cart Retrieval Number) in the My Carts page (for B2B users only). Possible values - Yes/No. Default = No. Set at IBE\_CUSTOMER (or applicable customer responsibility) responsibility level. Also can be set at application and site levels.

**A.7.0.26 IBE: Default Specialty Site**

Specifies the default specialty site, and is used to route Customer UI users directly to Site Home Page for the site specified in the profile. For value, enter the Site ID of the applicable site. Default = Null.

**Note:** Only in the following two cases will the page flow will route Customer UI users directly to the Site Home Page for the site specified in this profile:

1. When user tries to access the home page without specifying the site ID in the URL, and there is no site ID in the cookie.
2. The Site Selection Page is disabled (the profile, IBE: Use Specialty Site Selection Page, is set to No).

**A.7.0.27 IBE: Enable Debug**

Specifies whether user-specific logging is available for the JSP/Java and PL/SQL layers. Yes = User-specific logging activated. Default = No. Set at user level only. If you set this profile to Yes for a user, verify or set OM: Debug Log Directory at site level to a directory that is writable by the database server. Oracle iStore Customer UI user-specific logs for the PL/SQL layer are written in this directory.

**A.7.0.28 IBE: Enable Invoices in Order Tracker**

Specifies whether the Invoices subtab is displayed in Order Tracker. Possible values - Yes/No. Default = Yes.

**A.7.0.29 IBE: Enable Multiple Services**

If set to Yes, customers can add multiple services to a single serviceable item. If set to No, Oracle iStore will replace an existing service when another service is selected. Possible values - Yes/No. Default = No at site level. Can be set at site or responsibility level.

**Important:** If your implementation consists of several sites within one organization (causing one user to be able to access the same cart from different sites), then as a best practice you should set the profile option at the responsibility level to the same value for each supported responsibility within the organization.

#### **A.7.0.30 IBE: Enable Order Cancellation in Order Tracker**

Specifies whether registered users can cancel their orders using Order Tracker. B2B users must have the IBE\_CANCEL\_ORDER permission to have access to the functionality. Possible values - Yes/No. Default = No, at iStore application level; no value at responsibility level. Can be set at application and responsibility levels.

#### **A.7.0.31 IBE: Enable Order Tracker Global Icon**

Enables/disables the Orders navigation icon in the Customer UI. Default = Yes, at site level. Also can be set at application and responsibility levels.

#### **A.7.0.32 IBE: Enable Payments in Order Tracker**

Specifies whether the Payments subtab is displayed in Order Tracker. Possible values - Yes/No. Default = Yes.

#### **A.7.0.33 IBE: Enable Return Pre-booking Approval**

Used to enable return pre-booking approval feature. Can be set to Yes, provided you have Order Management Release 11.5.10 or later release installed. If not, leave the profile option set to No. Possible values - Yes/No. Default = No.

#### **A.7.0.34 IBE: Enable Return Policy**

Used to enable return policy constraints for Returns functionality. If set to Yes, each order line is checked through Oracle Order Management's Processing Constraints, which determine whether or no the order line can be returned by the user. Set to Yes only if implementing additional processing constraints for return policies. Possible values - Yes/No. Default value = No. Can be set at site or responsibility level.

#### **A.7.0.35 IBE: Enforce Terms and Conditions Review by User**

Specifies whether customers must view the T&Cs of a shopping cart or quote before submitting the order. Possible values - Yes/No. Default = No.

#### **A.7.0.36 IBE: Express Checkout Consolidation Time Interval**

Specifies the time interval (in minutes) in which Express Checkout carts are available to be added to before being submitted by the concurrent program, iStore - Express Checkout Order Submission. Default = 60. Set to an integer. Can be affected by the scheduled running of the concurrent program. For example, if the available time interval is set to 60 minutes, and the concurrent program runs every 45 minutes, an express checkout cart would be submitted on the second run of the



concurrent program; but, for example, if the concurrent program is set to run every 120 minutes, it will be submitted on the first run.

#### **A.7.0.37 IBE: Items Per Page for Display**

Specifies number of items to display in leaf sections (the ending sections of a node) of the section hierarchy. Default = 20. Set to an integer.

#### **A.7.0.38 IBE: Items Per Section for Display**

Specifies the maximum number of items to display per section. If no value is set, all items in a section will display. Default = Null. Set to an integer.

#### **A.7.0.39 IBE: Lines Per Section for Multiple Section Display**

Specifies the number of items to display per section when multiple sections display on page. Default = Null. Set to an integer. If no value is set, IBE: Items Per Page for Display is used.

#### **A.7.0.40 IBE: Mandate Contacts For Billing and Shipping**

Specifies whether B2B users must enter contact information before order submission. Yes = User must enter information; No = Optional for user. Default value = No.

#### **A.7.0.41 IBE: Maximum Columns in Specialty Site Page**

Specifies number of columns in Site Selection Page. Possible values = any reasonable integer. Default = 0. Can be set at site and application levels. Note that Oracle iStore does not support setting different levels for this profile option at site and application level. If you have set this profile option at application level, it is recommended that you unset the application-level setting and set the profile at site level.

#### **A.7.0.42 IBE: Maximum Direct Entry Rows**

Sets the row limit for the Direct Item Entry form. Also sets the maximum number of items that can be uploaded via the .csv file upload capability. If undefined, the number of rows is 100. Can be set at site, application, and responsibility levels. Maximum value: 100. Default value: 100 at site level. JTF\_PROFILE\_DEFAULT\_NUM\_ROWS takes precedence over IBE: Maximum Direct Entry Rows -- if the IBE profile option is less than the JTF profile option.

#### **A.7.0.43 IBE: Merge Shopping Cart Lines**

Specifies whether to merge item lines in the shopping cart if the same item is added to the cart more than once. Yes = Lines are merged if duplicate; No = No line merging. Default = No. If set to Yes, set IBE: Use Line Level Shipping to No.

#### **A.7.0.44 IBE: Number of Invoice/Order Lines Displayed**

Specifies the number of tables rows to display when users view orders, invoices, payments, and returns data in Order Tracker. Default = 10. Set to any reasonable integer.

#### **A.7.0.45 IBE: Number of Menu Subtabs**

Specifies the number of menu subtabs in the Site Home Page. Default = 5. Set to an integer. If you wish no subtabs to display, and no subsections to display in the Browse Bin, then you can set this profile option to zero.

#### **A.7.0.46 IBE: Number of Menu Tabs**

Specifies the number of menu tabs in the Site Home Page. Default = 5. Set to an integer.

#### **A.7.0.47 IBE: Preferred Shipping Method**

Specifies customers' preferred shipping method. Set at application, responsibility or user level to <shipping method name>. Default value = Null. Note that the lists of values at each level are restricted by organization. The organization is derived based on the current operating unit context in Oracle Forms, which is based on the responsibility of the logged-in user setting the profile option.

#### **A.7.0.48 IBE: Quick Links Menu**

For site management integration, enables the Quick Links bin in the Customer UI, after the required setup procedures have been performed. Set at responsibility level to the customer responsibility of the specialty site which will display this bin. A null value means there is an empty menu, and even if you map the Quick Links bin to sections, nothing will be displayed if Null.

#### **A.7.0.49 IBE: Return Orders Transaction Type**

Specifies the default return type (Oracle Order Management transaction type) used to create returns, whether with Oracle Order Management approvals or without. Set to the transaction type used to create returns. Possible values will be the list of order

transaction types of order categories, Return in Order Management. Can be updated at site and responsibility level. There is no default value for this profile.

**Note:** For Oracle iStore, transaction types of order Category = RETURN should only be created. Mixed should not be used and will not work.

#### **A.7.0.50 IBE: Saved Cart Expiration Duration (# days)**

Specifies the number of days that a user can access a saved shopping cart before it expires. The expiration date is calculated from the last update date of the cart, and the cart expires at the end of the day on which it is scheduled to expire. Default = 90. Set to any integer.

#### **A.7.0.51 IBE: Sections Per Page for Display**

Specifies the total number of sections to display per catalog page. If the number of subsections that belong to the catalog page's current section exceeds the number set in this profile option, they are paginated. Users reach the continuation page through the "Next" link that Oracle iStore automatically includes in the section page. Default = Null. If no value is set, the number of sections per page is not limited. Set to an integer.

#### **A.7.0.52 IBE: Use Add Item Bin**

Specifies whether the Add Item bin is displayed on product pages in its default location; this bin contains an Add to Cart button. Possible values - Yes/No. Default = Yes.

#### **A.7.0.53 IBE: Use Auth Permissions in Order Tracker**

Specifies if permission checking is enforced for users to view only the orders placed by themselves or all of their organizations' orders in Order Tracker, and while drilling down into order details in some reporting bins in the Site Administration UI. Possible values - Yes/No. Default = No. If set to Yes, iStore checks if the user has the following permissions in his user role, and if he doesn't, he is not allowed to view the organization orders: IBE\_VIEW\_INVOICE, IBE\_VIEW\_ORDER, IBE\_VIEW\_PAYMENT. Note that IBE\_VIEW\_RETURN\_ORDER applies to this functionality if using Returns. Set at iStore application level.

#### **A.7.0.54 IBE: Use CABO UI**

Set this profile option to Yes. Default = Yes.

#### **A.7.0.55 IBE: Use Call Me Back**

Specifies whether the callback feature is enabled. Possible values - Yes/No. Default = No. Set at iStore application level.

#### **A.7.0.56 IBE: Use Cart Level Service**

This profile option is currently not in use. Set to No. Default = No.

#### **A.7.0.57 IBE: Use Catalog Exclusions**

Specifies whether the exclude sections or products from sites functionality works. Possible values - Yes/No. Default = Null (treated as No). Yes = sections or products explicitly excluded will not show up in Customer UI. No = Any sections or products explicitly excluded will still show up in Customer UI. If section or product exclusions are never specified for a site, then set to No to improve performance.

#### **A.7.0.58 IBE: Use Commitments**

Specifies whether customers can use commitments at checkout. Set to Yes or No depending on business need. Default = No. When this profile is Yes, users must have the IBE\_VIEW\_NET\_PRICE permission to make use of commitments functionality.

#### **A.7.0.59 IBE: Use Customer Service Exclusion**

Used for service items functionality. If set to Yes, Oracle iStore calls an Oracle Service Contracts API to check and utilize party exclusion rule setups. Set to Yes if using party exclusion rules. Possible values - Yes/No.

#### **A.7.0.60 IBE: Use Direct Item Entry**

Specifies whether customer-to-merchant part number mapping and associated functionality (ability to upload .csv files in the direct item entry form and add items to the cart quickly) is available in the Direct Item Entry form in the Customer UI. Possible values = Yes/No. Default = Yes. Set at iStore application or responsibility level.

#### **A.7.0.61 IBE: Use Express Checkout**

Specifies whether Express Checkout is enabled. Possible values - Yes/No. Default = Yes.

**A.7.0.62 IBE: Use Global Bin**

Specifies whether the Global Bin is displayed on section pages in its default location. Possible values = Yes/No. Default = Yes.

**Note:** This profile works only if you use the fixed layout when creating a section. If sections are associated to configurable layout, then you need to select the Global Bin and map it to a location in the layout template.

**A.7.0.63 IBE: Use Item Level Service**

Enables or disables the Service Items Support functionality in Oracle iStore. Possible values = Yes/No. Default = No.

**A.7.0.64 IBE: Use Line Level Shipping**

Specifies whether customers can enter line level shipping information in shipping information page. Possible values - Yes/No. Default = Yes. If set to Yes, set IBE: Merge Shopping Cart Lines to No, as you cannot enable shopping cart line merging and line splitting simultaneously.

**A.7.0.65 IBE: Use Logical Media for Images**

Out-of-box, to improve performance, Oracle iStore uses hard-coded images to display icons and menus. Set to Yes if you are using customized menu or media object images. Yes = DisplayManager uses logical media for menu or media object images. No = Disables logical media retrieval for menu images and uses default hard-coded menu images. Default = No.

**A.7.0.66 IBE: Use Profile Menu**

For site management integration, allows the use of integrating applications' user profile menus in the Customer UI, after the required setup procedures have been performed. Set at site level to the integrating application's user profile menu root. If set to null, no profile menus will be displayed, and hence the profile pages will be blank. The default menu associated to this profile is IBE\_C\_PROFILE\_ROOT, the seeded iStore Customer Profile Menu Root.

**A.7.0.67 IBE: Use Promotion Code**

Enables/disables appearance of the Promotion Codes link in shopping cart. Possible values - Yes/No/Null. Null value is treated as Yes. Default = Yes at iStore application level. Also can be set at responsibility level to the iStore customer responsibility of your choice. When this profile is Yes, users must have the IBE\_VIEW\_NET\_PRICE permission to make use of promotion code functionality.

#### **A.7.0.68 IBE: Use Returns**

Enables/disables appearance and related functionality of the Returns tab within the Orders menu in the Customer UI. Possible values - Yes/No. Default = No at site level. Can be set at site or responsibility level.

**Note:** If you are integrating with other Oracle E-Business Suite HTML applications that use Oracle iStore's Order Tracker screens, it is recommended that you set this profile value to Yes at responsibility level (and not site level), to prevent the appearance of any Returns functionality within these other applications. When integrating with Oracle iSupport, set this profile to Yes at the application or responsibility level. If you are not integrating with other Oracle E-Business Suite HTML applications that use Oracle iStore's Order Tracker screens, you may set this profile to Yes at site level.

See also: [Section 12.8.6.1, "Returns Profile Setting and UI Display"](#)

#### **A.7.0.69 IBE: Use Sales Assistance Feature**

Specifies whether Sales Assistance is enabled. Possible values - Yes/No. Default = No. If set to No, the Need Salesrep Assistance button in the Order Review page will not appear, nor will users see the I disagree - Need Assistance button in the Review Terms and Conditions page. Can be set at application or responsibility level.

#### **A.7.0.70 IBE: Use Section Bin**

Specifies whether the Browse Bin is displayed on section pages in its default location, at the left-hand side of the screen, on the Site Home Page and other section pages. Possible values = Yes/No. Default = Yes.

**Note:** This profile works only if you use the fixed layout when creating a section. If sections are associated to configurable layout, then you need to select the Global Bin and map it to a location in the layout template.

#### **A.7.0.71 IBE: Use Section Path**

Specifies whether the section path is displayed on section and item pages in its default location. Possible values - Yes/No. Default = Yes.

#### **A.7.0.72 IBE: Use Sensitive Pages**

A sensitive page is a page that displays personal, user-specific information. In Oracle iStore, the checkout and account pages are sensitive. Catalog (sections and products), shopping cart, and Order Tracker pages are not sensitive. Yes = the

application reauthenticates a logged-in user before displaying a sensitive page. No = reauthentication does not take place. Default = Yes.

#### **A.7.0.73 IBE: Use Share Cart Functionality**

Specifies whether cart sharing is enabled in the Customer UI. Set to Yes or No depending on business need. Default = No. Set this profile option to the customer responsibility which maps to the applicable specialty site. You also can set it at site or application level.

#### **A.7.0.74 IBE: Use Shipping Instructions**

Specifies whether users can enter shipping instructions in shipping information page. Possible values - Yes/No. Default = Yes.

#### **A.7.0.75 IBE: Enable Shopping Cart Global Icon**

Enables/disables the Cart navigation icon in the Customer UI. Default = Yes, at site level. Also can be set at application and responsibility levels.

#### **A.7.0.76 IBE: Use Shopping Lists**

Specifies whether shopping list functionality is available to customers. Possible values - Yes/No. Default = Yes.

#### **A.7.0.77 IBE: Use Specialty Sites Selection Page**

Enables display of Site Selection Page as default landing page in Customer UI. Possible values = Yes/No. Default = Yes. If No, the Sites navigation icon is displayed in the UI. Can be set at site and application levels. Note that Oracle iStore does not support setting different levels for this profile option at site and application level. If you have set this profile option at application level, it is recommended that you unset the application-level setting and set the profile at site level.

#### **A.7.0.78 IBE: Use Specialty Site Picker**

Enables Site Picker display on Site Home Page. Possible values - Yes/No. Default = No.

#### **A.7.0.79 IBE: Use Support**

Determines whether users can choose service items for serviceable items that are in their carts. If the profile option is set to Yes, a pull-down menu of service items

appears in the shopping cart. If the profile option is set to No, users cannot purchase service items. Default = No.

### **A.7.0.80 IBE: Use Web Placements**

Specifies whether out-of-the-box eMerchandising postings from Oracle Marketing can display on Customer UI pages. Possible values - Yes/No. Default = No. Yes enables eMerchandising postings. No disables eMerchandising postings, but users can still use the bins to display content. Can be set at application or site levels. If integrating Oracle iStore with other Oracle E-Business HTML applications, set at site level.

### **A.7.0.81 IBE: Use Welcome Bin**

Enables the Welcome Bin on section pages. Possible values - Yes/No. Default = Yes.

**Note:** This profile works only if you use the fixed layout when creating a section. If sections are associated to configurable layout, then you need to select the Global Bin and map it to a location in the layout template.

### **A.7.0.82 OM: Debug Log Directory**

If you have set the IBE: Debug profile option to Yes for a user, verify or set this profile option to a directory that is writable by the database server. Oracle iStore Customer UI user-specific logs for the PL/SQL layer are written in this directory. Value = <Directory path>.

## **A.8 Customer UI Pricing Profile Options**

Profile options in this section control the behavior of pricing behavior in Customer UI. All of these profile options are optional. Set at iStore application level unless otherwise specified.

### **A.8.0.83 IBE: Retrieve all Units of Measure for an Item**

Specifies if all units of measure (UOMs) for an item are retrieved with prices or only primary UOM with prices. Possible values - Yes/No. Yes = All UOMs retrieved; No = Primary UOM retrieved. Default = No. See [Section 7.5, "Display Options for Units of Measure"](#). If using Direct Item Entry, also see [Table 12-1, "Using Profile Options to Display UOMs"](#).



**A.8.0.84 IBE: Use Line Agreements**

Specifies whether B2B users with the permission, IBE\_USE\_PRICING\_AGREEMENT, can select pricing agreements at item level, in addition to the cart-level agreement selection enabled by the permission. Possible values - Yes/No. Default = No. When this profile is Yes, users must have the IBE\_VIEW\_NET\_PRICE permission to make use of the item-level pricing agreements functionality.

**A.8.0.85 IBE: Use Price List Associated with Specialty Site**

Specifies where to retrieve price lists. Possible values - Yes/No. Yes = Oracle iStore uses site-based price lists specified during site setup. No = Best price retrieved through Pricing Engine. Default = No. Can be set at site, application, or responsibility levels. **Note:** Guest (walk-in user) user price lists are always determined by the price list selected for Walk-in Users in the Site Administration UI.

**A.8.0.86 IBE: Use Site As Pricing Qualifier**

Specifies whether a site can be used as a pricing qualifier. Possible values - Yes/No. Default = No.

**A.8.0.87 ASO: Enable Promotional Goods**

Enables/disables promotional goods functionality. Possible values - Yes/No. Can be set at the site, application and responsibility levels. Default value at iStore application level = No. Default value at Quoting application level = Yes.

**A.8.0.88 QP: Multi-Currency Installed**

Oracle Advanced Pricing profile. Specifies whether multiple currency price lists are supported. Possible values - Yes/No. Default = No. Set site or iStore application level.

## **A.9 Customer UI Product Search Profile Options**

Set these at iStore application level unless otherwise directed. For additional information, see [Section 7.9, "Setting up Product Search for the Customer UI"](#).

**A.9.0.89 IBE: Category Set Filter for Product Search**

Allows you to specify which category set's products will be populated into the iStore search table. If the profile is not set, then products in all category sets will be

populated to the iStore search table. Default = Null. It is recommended that it be set at site level to the Oracle iStore default product category set.

#### **A.9.0.90 IBE: Enable Fuzzy Search**

Enables “fuzzy” product searches. Possible values - Yes/No. Default = No.

#### **A.9.0.91 IBE: No of Results in Search**

Determines the maximum number of results returned. Default = 200. Set to an integer.

#### **A.9.0.92 IBE: Search Lines Per Page**

Sets the number of lines to be displayed per page. Default = 20. Set to an integer.

#### **A.9.0.93 IBE: Thesaurus File Name**

Specifies the prefix for the thesaurus names of the synonym files that you load for the Oracle iStore product synonym search. Default = IBETHESAURUS.

#### **A.9.0.94 IBE: Use Category Search**

Determines whether the search menu in the Customer UI restricts searches to category- or section-level searching. Yes = Categories with publishable items will be searched. No = Site’s top level sections will be searched. Null = Enables basic search against all products in the current site.

#### **A.9.0.95 IBE: Enable Quick Search**

Enables/disables Quick Search in the Customer UI. Default = Yes, at site level. Also can be set at application or responsibility level.

#### **A.9.0.96 IBE: Use Synonym Search**

Determines whether the product search retrieves product names that are synonyms of the users’ search keywords. Possible values - Yes/No. Yes = Synonym search enabled (after you load a thesaurus). No = Synonym search disabled. Default = No.

#### **A.9.0.97 IBE: Web Status Filter for Product Search**

Allows you to specify whether products with a specific web status are populated to the iStore search table when the search concurrent program is run. Possible values are: All, Published, Published and Unpublished. A Null value is treated as Published. Default = Published. Set at site level.

## A.10 Reports Profile Options

Set these profile options at iStore application level, unless otherwise directed. For more information, see [Chapter 16, "Implementing Reports"](#).

### A.10.0.98 IBE: Currency Code

Specifies the currency code used in iStore Reports. Mandatory profile option.

### A.10.0.99 IBE: Enable Force Refresh

Specifies whether to populate the iStore Reports fact tables with data even if they already hold data for exactly the same time period that you have specified in the parameters of the iStore Reports Complete Data Refresh Set concurrent programs. Yes forces this data refresh. No prevents this data refresh; this option refreshes only the unpopulated data. Default = Yes.

### A.10.0.100 IBE: Enable Parallel Data Extraction for Reporting

Specifies whether parallelism is enabled when running the data refresh concurrent programs for iStore Reports. Yes enables parallelism. No disables parallelism. Default = No.

### A.10.0.101 IBE: GL Conversion Type

Specifies the GL currency conversion type for iStore Reports. Mandatory profile option. The GL currency conversion type provides the information necessary to convert transaction amount data from the original currencies to the currency required by iStore Reports, which is specified in the profile option IBE: Currency Code. The setting for IBE: GL Conversion Type must match the conversion type chosen when you set up the daily currency conversion rate in Oracle General Ledger for the required iStore Reports period.

### A.10.0.102 IBE: GL Period Set Name

Specifies the GL period set used by the iStore Reports. Mandatory profile option. Set to the calendar that you want the iStore Reports to use. This calendar must use the Oracle General Ledger standard period types: Day, Month, Quarter, and Year. The Oracle General Ledger time periods in the calendar must be non-adjusting periods.

#### **A.10.0.103 IBE: iStore Materialized Views Usage**

Controls whether the database engine re-routes iStore Report queries against materialized views when the queries are run against the fact tables. The database engine re-routes the queries if the profile option is set to Yes. Default = Yes.

#### **A.10.0.104 IBE: Quarter Begin Data**

Specifies whether the iStore Reports Complete Data Refresh Set can default the Begin Date parameter to the start date of the current quarter if the user does not define a value, or if the user-defined value is later than the quarter start date. Yes enables defaulting to the quarter start date. No disables defaulting. Default = Yes. The value of the profile option is irrelevant if the profile option IBE: YTD Data Availability in Bins is set to Yes.

#### **A.10.0.105 IBE: Truncate Records**

Specifies whether records are deleted or truncated in the iStore Reports fact tables. Yes truncates the records, resulting in faster performance. Default = Yes.

#### **A.10.0.106 IBE: YTD Data Availability in Bins**

Specifies whether the iStore Reports Complete Data Refresh Set can default the Begin Date parameter to the start date of the current year if the user does not define a value, or if the user-defined value is later than the year start date. Yes enables defaulting to the year start date. No disables defaulting. Default = Yes. If set to Yes, IBE: Quarter Begin Data is irrelevant.

## **A.11 Lead Import Profile Options**

Set these profile options at iStore application level, unless otherwise directed. For more information, see [Chapter 29, "Integrating Oracle iStore with Oracle Sales Applications"](#).

#### **A.11.0.107 IBE: Order Lead Import Interval (In Days)**

Determines the number of days between retrieval of order lead data. Default value = 1.

#### **A.11.0.108 IBE: Quote Lead Import Interval (In Days)**

Determines the number of days between retrieval of quotes lead data. Default value = 1.

**A.11.0.109 IBE: Email Address For Lead Import Status**

Enter the e-mail address of the person to whom the lead import program status will be sent. Use the format: john.doe@company.com. Separate multiple entries with a single space or comma. Default value = Null.

**A.12 Oracle Workflow (E-mail Notifications) Integration Profile Options**

Set these profile options at iStore application level, unless otherwise directed. For more information, see [Chapter 34, "Integrating Oracle iStore with Oracle Workflow"](#).

**A.12.0.110 IBE: Default Order Admin to Send Workflow Notification**

Specifies the default order administrator's Oracle Workflow user name. An e-mail is sent to this order administrator upon errors in submitting orders. Set this to the Oracle Workflow username of the appropriate user.

**A.12.0.111 IBE: Email Address to Send Diagnostic Messages**

Specifies the e-mail address that receives diagnostic messages when there is an Oracle iStore application error in the Customer UI, such as an exception. Oracle iStore sends the exception message and application context to this e-mail address. The recipient can use the information to troubleshoot Oracle iStore. Can be set at site and application levels.

**A.13 Caching and SSL Profile Options**

Set these profile options at iStore application level, unless otherwise directed.

For more information, see:

- [Chapter 18, "Implementing Performance and SSL"](#)
- [Chapter 33, "Integrating Oracle iStore with Oracle9iAS Web Cache"](#)

**Note:** IBE Cache is no longer supported. Use JTT Cache instead of IBE Cache.

**A.13.0.112 IBE: Use Web Cache Feature**

Mandatory profile option. Specifies whether to use Oracle9iAS Web Cache. Set to Yes or No depending on business need. Default = No.

#### **A.13.0.113 IBE: iStore Non Secure URL**

Mandatory profile option. Specifies the base URL for the non-secure server (HTTP). If integrating with Oracle 9iAS Web Cache, set to the web cache URL and bounce the server. This will ensure that all iStore non-secure pages are coming through the web cache server. Can be set at site or application level.

#### **A.13.0.114 IBE: iStore Secure URL**

Specifies the base URL for the secure server (HTTPS). Can be set at site or application level.

### **A.14 Oracle Order Capture/Oracle Quoting Integration Profile Options**

This section contains the profile option settings for integration with Oracle Order Capture and Oracle Quoting. Set at site and iStore application level, unless otherwise directed. This section does not include the mandatory profile options listed in other sections. See [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information. See *Oracle Quoting Implementation Guide* for more information on the Quoting profile options.

#### **A.14.0.115 ASO: Default Contract Template**

Specifies the default contract template for Terms and Conditions. The LOV to select the default template will show all the contract templates set up through Oracle Quoting. Oracle iStore and Oracle Quoting will have access to the same set of templates. Can be set at site, application, or responsibility level. Default = Null. If no default contract template is specified for this profile and contracts integration is enabled (OKC: Enable Sales Contracts = Yes), Oracle iStore will not show the T&C link in the order review page and hence no T&Cs will be passed to Oracle Order Management. Note that the LOV at each level is restricted by organization.

#### **A.14.0.116 ASO: Default Salesrep**

Set to default sales representative for sales assistance. Used to assign a sales representative to a quote when Sales Assistance is initiated, and to send the e-mail notification to the sales representative. However, if automatic sales representative assignment is set up through Oracle Territory Manager, then the sales representative (Resource ID) for the quote header gets changed to the territory-based sales representative (through an Oracle Order Capture API), and the e-mail notification goes to this sales representative.

**A.14.0.117 ASO: Enable Line Level Billing**

Specifies whether B2B customers can enter line-level billing information at checkout. Payment type must be cash or invoice to use line level billing. Possible values - Yes/No. Default = No. Can be set at site, application, and responsibility levels.

**A.14.0.118 ASO: Enable ASO Debug**

Ensures that Oracle Order Capture-related logging messages will appear in the PL/SQL log files along with those for Oracle iStore, Oracle Order Management, and Oracle Pricing. Possible values - Yes/No. Set at user level only.

**A.14.0.119 ASO: Quote Conversion Type**

Set at iStore application level to the same value as the Oracle Quoting application level setting.

**A.14.0.120 ASO: Reservation Level**

Specifies the level at which item reservations are performed. Items can be reserved manually, or automatically when the order is placed. Set to Null at site level only.

**A.14.0.121 ASO: Validate Salesrep**

Specifies whether a sales representative must be specified on a quote prior to submitting it as an order. Possible values - Yes/No. Default value = No.

**A.14.0.122 IBE: Allow Update for Draft Quotes**

If set to Yes, allows customers to update published quotes in Draft status in the Customer UI. Also enables Updateable table column in My Quotes page. Possible values - Yes/No. Default value = No. Set at site level only.

**A.14.0.123 IBE: Use Quote Publishing**

If set to Yes, allows customers to access quotes in two areas in the Customer UI: (1) Enables the View Quotes link in the Welcome Bin on sites' home pages; (2) Enables the My Quotes subtab within the Cart button in the Customer UI. Possible values - Yes/No. Default value = No. Set at application level only.

**A.14.0.124 OKC: Enable Sales Contracts**

Enables/disables Terms and Conditions functionality in the Customer UI. If the profile option is No, Oracle iStore will not display T&Cs and no contract ID will be

passed to Oracle Order Management. This profile may be set at the site and application levels. If using Oracle Quoting and Oracle iStore together with the T&Cs functionality, the profile option should be set at site level.

## A.15 Oracle Configurator/Bills of Material Integration Profile Options

Set the profile options in this section at the levels described in the table below. For more information, see:

- [Chapter 22, "Integrating Oracle iStore with Oracle Bills of Material"](#)
- [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#)

### A.15.0.125 BOM: Configurator URL of UI Manager

Required for Configurator integration. Specifies the URL for the Oracle Configurator Servlet. Set to Oracle Configurator Servlet URL at site, iStore application, and IBE\_CUSTOMER responsibility.

### A.15.0.126 ASO: Configurator URL

Mandatory profile option. Set to the same value as BOM: Configurator URL of UI Manager.

### A.15.0.127 OM: Use Configurator

Mandatory profile option. Set at site level to Yes if you are integrating with Oracle Configurator.

## A.16 Oracle Content Manager Integration Profile Options

The following profile options should be set if you are integrating with Oracle Content Manager. The internal product code/key for Oracle Content Manager is IBC. Set the profile options in this section at the levels indicated. See [Chapter 24, "Integrating Oracle iStore with Oracle Content Manager"](#), for more information.

### A.16.0.128 IBE: Default Home Folder

Specifies the default folder for OCM integration; allows the iStore administrator to access the correct folder in OCM. Set at application level to /IBE.



**A.16.0.129 IBE: Number of Days for Expiring Content**

Determines the timeframe for the default search performed in the Usage Summary screen. Oracle iStore reads the value of this profile option (x) and includes only those content items whose expiration date is that number of days (x) or less from system date (current date). Default value = Null. If set to Null, all content items will display, regardless of expiration date. Set at iStore application level.

**A.16.0.130 IBE: Use Content Management Integration**

When the iStore Content Items Migration concurrent program is run, the concurrent program sets this profile to Yes at the iStore site level. Note that you cannot use this profile option to turn "off" the integration between Oracle iStore and Oracle Content Manager.

**Note:** For Release 11.5.9 customers upgrading to R11.5.10: Set this profile at site level. Oracle iStore does not support different values for this profile option at site and application level. If profile option is set at application level, unset the application-level setting and set the profile at site level.

**A.16.0.131 IBC: Use Access Control**

This profile option controls whether user permissions are checked in the OCM pages. If this profile option is set to No at the iStore administrator responsibility level, then the iStore administrator has access/permissions to all content functionality. If the profile option is set to Yes, then you can control the permissions at the user level. Recommended value = Yes at the site level; ensure a No setting at all other levels. See the *Oracle Content Manager Implementation Guide* for additional details.

## **A.17 Oracle Marketing Integration Profile Options**

The following profile options should be set if you are integrating with Oracle Marketing. The internal key for Oracle Marketing is AMS. Set the profile options in this section at the levels indicated. See [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

**A.17.0.132 IBE: Use Advanced Product Setup**

Controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Site Administration UI. To invoke Oracle Marketing's Product pages, set this profile option to Yes at the iStore application level. If set to No, then Oracle iStore's Product Detail pages will be retrieved. Profile is updateable at all levels.

#### **A.17.0.133 AMS: Inventory Item Update Allowed**

Allows items created in Oracle Inventory to be updated through the Oracle iStore-Oracle Marketing integration screens. Set to Yes at site level.

#### **A.17.0.134 AMS: Item Validation Organization**

Set this to your Master Organization at site level. This profile option and IBE: Item Validation Organization profile option must match at site level. Note that if you set IBE: Item Validation Organization at iStore administrator responsibility level to a different inventory organization than that specified at site level in AMS: Item Validation Organization, then the iStore administrator will not have access to the product creation abilities; however, he will still be able to update products in the inventory organization specified at the responsibility level. Cannot be set at responsibility level.

#### **A.17.0.135 OSO: Debug Messages On**

Allows Oracle Marketing debug messages to appear. Set to Yes at site level.

## **A.18 Unsupported Profile Options**

The following IBE profile options are not supported:

- IBE: Authorize Payment Offline During Normal Checkout
- IBE: Cache On
- IBE: Capture Payment for Downloadable Products
- IBE: Cart Level Support Duration
- IBE: Create Standard Contract
- IBE: Days For Email
- IBE: Default Contract Template Name
- IBE: Default Display Context
- IBE: Default Item Media
- IBE: Default Item Template
- IBE: Default Pricing Agreement for the User
- IBE: Default Request Terms Change User to Send Workflow Notification
- IBE: Default Sales Assistant to Send Workflow Notification

- IBE: Default Sales Lead Promotion Code
- IBE: Default Section Media
- IBE: Default Section Template
- IBE: Display Language List in Specialty Store Page
- IBE: Display Specialty Store Selection in Alphabetical Order
- IBE: Dynamic Content Callback Parameter
- IBE: Email Promotions
- IBE: Enable Walkin Order Search in Order Tracker
- IBE: Express Checkout Error Behavior
- IBE: Finalize Order On Error in Authorize Payment
- IBE: Line Level Pricing Event for Shopping Cart
- IBE: Maximum Number of Saved Shopping Carts
- IBE: Maximum Number of Shopping Lists
- IBE: Notification User Role
- IBE: Number of Days for New Item Definition
- IBE: Preload Specialty Store Cache
- IBE: Preferred Support Level for Shopping Cart
- IBE: Recalculate Price in Order Management
- IBE: Reject Terms and Conditions Flow
- IBE: Reserve Items On Every Express Checkout
- IBE: Search Minimum Prefix Value
- IBE: Search Operator
- IBE: Section Name for CD Packs Section
- IBE: Shopping Cart Expiration Duration
- IBE: Shopping Cart Price based on Owner
- IBE: Shopping Cart Frozen Price Duration
- IBE: Show Change Store Link
- IBE: SMTP Server

- IBE: Top Number of Items
- IBE: URL Prefix for DataBase Media
- IBE: URL Prefix for Media in File System
- IBE: URL to Launch Content Bin
- IBE: Use AOL Menu in Customer UI
- IBE: Use Business to Customer Features
- IBE: Use Business User Auto Approval
- IBE: Use CD Packs
- IBE: Use Contracts
- IBE: Use CSI Number in Order Tracker
- IBE: Use Default Bin Preference
- IBE: Use Fax Credit Card as a Payment Option
- IBE: Use Invoice as a Payment Option
- IBE: Use JTA User Management
- IBE: Use Line Types
- IBE: Use Notes
- IBE: Use Shop List
- IBE: Use Tasks
- IBE: View Custom Quote Line Details
- IBE: Use Workflow Features in iStore

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## Concurrent Programs

This chapter describes Oracle Applications concurrent programs used by Oracle iStore 11i.

Main topics in this chapter include:

- [Section B.1, "Overview of Oracle Applications Concurrent Programs"](#)
- [Section B.2, "Overview of Oracle iStore Concurrent Programs"](#)
- [Section B.3, "Search Functions Concurrent Programs"](#)
- [Section B.4, "Order Submission Concurrent Program"](#)
- [Section B.5, "Reporting Concurrent Programs"](#)
- [Section B.6, "Template Mappings Import/Export Concurrent Programs"](#)
- [Section B.7, "iStore Lead Import Concurrent Program Set"](#)
- [Section B.8, "iStore Product Autoplacement"](#)
- [Section B.9, "iStore Oracle Content Manager Integration Migration"](#)
- [Section B.10, "Oracle Marketing Integration Concurrent Program"](#)
- [Section B.11, "Setting Concurrent Program Manager Profile Options"](#)
- [Section B.12, "Running Concurrent Programs"](#)
- [Section B.13, "Checking Concurrent Program Status"](#)
- [Section B.14, "Sending Concurrent Program Results by Email"](#)

## B.1 Overview of Oracle Applications Concurrent Programs

In Oracle Applications, concurrent programs are system batch jobs that retrieve and push data between Oracle applications and the database. Concurrent programs can be comprised of a single request or a request set containing more than one concurrent program. Concurrent programs usually have logs associated with them that provide details of the concurrent program data.

### When to Schedule Oracle Applications Concurrent Programs

You can set up and start using Oracle Applications concurrent programs at any time in your implementation. Programs can be set to run on a schedule or only upon user request. For more complete information on Oracle Applications concurrent programs, see *Oracle Applications System Administrator's Guide*.

### When to Schedule Programs - Oracle iStore Specifically

See the detail descriptions of the iStore concurrent programs. For a summary of the programs available, see: [Section B.2, "Overview of Oracle iStore Concurrent Programs"](#).

### Steps to Run Concurrent Programs

See [Section B.12, "Running Concurrent Programs"](#) for quick-steps.

See *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

## B.2 Overview of Oracle iStore Concurrent Programs

There are eight concurrent jobs seeded in the Oracle Applications (Forms) iStore concurrent program manager setup. The list below is organized by concurrent program type (i.e., what it does).

- Search Functions Concurrent Programs
  - [Section B.3.1, "iStore Search Insert"](#)
  - [Section B.3.2, "iStore Section Search Refresh"](#)
- Order Submission Concurrent Program
  - [Section B.4.1, "iStore - Express Checkout Order Submission"](#)
- Reporting Concurrent Programs
  - [Section B.5.1.1, "iStore Reports Fact Tables Refresh"](#)

- [Section B.5.1.2, "iStore Reports Materialized Views Refresh"](#)
- [Section B.5.1.3, "iStore Reports Alerts"](#)
- [Section B.6, "Template Mappings Import/Export Concurrent Programs"](#)
- Lead Import Concurrent Program
  - [Section B.7, "iStore Lead Import Concurrent Program Set"](#)
- Products Concurrent Program
  - [Section B.8, "iStore Product Autoplacement"](#)
- Oracle Content Manager Integration Concurrent Program
  - [Section B.9, "iStore Oracle Content Manager Integration Migration"](#)
- Oracle Marketing Integration Concurrent Program
  - [Section B.10, "Oracle Marketing Integration Concurrent Program"](#)

## B.3 Search Functions Concurrent Programs

The following concurrent programs control the product search functionality.

### B.3.1 iStore Search Insert

**iStore Search Insert** is a single request concurrent program that you execute one time as a post-install step during your Oracle iStore implementation. Run this batch job after you have loaded Oracle Inventory items and set the Inventory organizations. This program populates Oracle iStore's category search table with product information from the Oracle Inventory tables.

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

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

### B.3.2 iStore Section Search Refresh

This concurrent program populates Oracle iStore's section search table with product information.

To enable section-level search on the Customer UI for the first time, run the iStore Search Insert first, then run the iStore Section Search Refresh program. To switch from category-level to section-level search, run only the iStore Section Search Refresh program.

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

## B.4 Order Submission Concurrent Program

The following concurrent program submits orders for Express Checkout:

### B.4.1 iStore - Express Checkout Order Submission

Schedule this program as a batch process that runs at pre-determined intervals. This program converts the Express Checkout shopping carts into orders.

## B.5 Reporting Concurrent Programs

This section describes the concurrent programs that populate database tables required for site reports and site reports delivered via e-mail.

### B.5.1 iStore Reports Data Refresh Set

Oracle iStore currently has two program sets for Reports data refresh:

- **iStore Reports Complete Data Refresh Set** --- See [Section B.5.1.4, "Guidelines for Running Complete Data Refresh Set"](#).
- **iStore Reports Increment Data Refresh Set** --- See [Section B.5.1.5, "Guidelines for Running Increment Data Refresh Set"](#).

Each set contains the following three programs:

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



These programs are necessary to update data for Oracle iStore Reports and to trigger e-mail notifications of reports.

#### **B.5.1.1 iStore Reports Fact Tables Refresh**

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

#### **B.5.1.2 iStore Reports Materialized Views Refresh**

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

#### **B.5.1.3 iStore Reports Alerts**

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

#### **B.5.1.4 Guidelines for Running Complete Data Refresh Set**

Run this request set:

- When you want to change the parameters specifying the data that is available to Oracle iStore Reports;
- When the data within your previously specified parameters has changed since you last ran the program; and
- When you need to update the reports materialized views to reflect data changes in the reports fact tables.

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

#### **B.5.1.5 Guidelines for Running Increment Data Refresh Set**

This request set is identical to the Complete Data Refresh Set, but it only updates the fact tables and materialized views with data **from the time since the last data refresh was run**.

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

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

## B.6 Template Mappings Import/Export Concurrent Programs

Oracle iStore's Display Template Import/Export functionality within Template Manager allows you to export or import template mappings using XML files. The functionality is implemented as two concurrent programs:

- iStore Template Mapping Import Concurrent Program
- iStore Template Mapping Export Concurrent Program

For full details on these concurrent programs, please refer to [Section D.3, "Display Template Mappings Import and Export"](#).

## B.7 iStore Lead Import Concurrent Program Set

The concurrent program request set, iStore Lead Import Set, pulls data matching certain parameters into the Oracle Sales leads database table.

The request set contains the following concurrent programs:

- iStore Lead Import Quotes
- iStore Lead Import Orders

For more information, see [Section 29.6.1, "Run iStore Lead Import Concurrent Program Set"](#).

## B.8 iStore Product Autoplacement

The iStore Autoplacement program can be used to populate leaf sections with products from Oracle Inventory categories. The program also can remove products from sections that no longer match the criteria of the concurrent program and section-category mappings.

For more information, see [Section 7.7, "Using Product Autoplacement"](#).

## B.9 iStore Oracle Content Manager Integration Migration

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, iStore Oracle Content Manager Integration Migration.

Both existing customers and new customers who want to use the OCM integration must run the concurrent program as a mandatory step to migrate the seed and customer data.

See [Section 24.7, "Concurrent Program to Migrate Data"](#), for more information.

## B.10 Oracle Marketing Integration Concurrent Program

If you are integrating Oracle iStore with Oracle Marketing's product screens, you must load the inventory categories information into Oracle Marketing database tables. To do this, run the concurrent program, AMS Load Inventory Categories. After this program is run, the categories information shows up in the Oracle Marketing UI.

See [Chapter 26, "Integrating Oracle iStore with Oracle Marketing"](#), for more information.

## B.11 Setting Concurrent Program Manager Profile Options

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

- ASO: Default Order Type
- ASO: Validate Salesrep

See [Section A.4, "Concurrent Program Manager Profile Options"](#), for profile option values.

## B.12 Running Concurrent Programs

Below are instructions for running any Oracle Applications concurrent program or program set. You can use these procedures to run or schedule any of the Oracle iStore concurrent programs.

See *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

### Responsibility

- For Oracle Applications concurrent programs in general, it varies by module.
- For Oracle iStore concurrent programs, use iStore Concurrent Programs Responsibility

### Steps

1. Log in to Oracle Forms with the appropriate responsibility as described under Responsibility, above. The Submit a New Request form opens.
2. Choose Single Request (to run a single concurrent program) or Request Set (to run a set of concurrent programs).
3. Select OK. The Submit Request form opens.
4. Query for the appropriate concurrent program, if necessary.
5. Select the desired request or request set.
6. Either run immediately or select Schedule to schedule the batch jobs.
7. If scheduling, select the timeframe:
  - **As Soon as Possible radio button** -- To run the program(s) right away, select this option and then select OK.
  - **Once radio button** -- To run the program(s) once at a time that you will later specify, select this option and then select OK.
  - **Periodically or On Specific Days radio buttons** -- To run the program(s) on a schedule that you will later specify, select this option, enter information in the appropriate fields, and then select OK.
8. Select Submit to submit the request. You receive a confirmation that the request has been submitted.
9. Optional: You can monitor the progress of your request by looking at the request log and output files in \$COMMON\_TOP/admin/log/l<request ID>.log and \$COMMON\_TOP/admin/out/<request ID>.out, respectively.
10. Optional: You can also view the request status by selecting **View > Requests** and searching by the request ID.

## B.13 Checking Concurrent Program Status

Use the following procedure to check the status of a concurrent program.

**Steps**

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose **Concurrent > Requests**.  
The Find Requests window (defaulted to "All My Requests") opens.
3. In the Find Requests window, search for your concurrent program request.
  - If the server is not busy, then selecting **Find** may be the fastest way to find your request.
  - If your server is busy, it may be better to enter search criteria and look for Specific Requests.
4. The Requests window displays a list of submitted requests. The Oracle iStore concurrent programs should be listed.
5. Click **Refresh Data** occasionally to check the completion status.
6. Once in the "red" state or Phase = "Completed", the "View Output" and "View Log" buttons will become active if the log and output files have been setup correctly.

## B.14 Sending Concurrent Program Results by Email

You can send the results of concurrent requests via e-mail. Instructions can be found in the *Enhancing Concurrent Processing* whitepaper in the performance section of [Oracle AppsNet](http://oracle.com/appsnet/technology/performance/content.html) (<http://oracle.com/appsnet/technology/performance/content.html>).



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## Seeded User Data

This appendix lists the seeded Oracle Forms, Oracle CRM Applications, and Oracle iStore 11i Site Administration and Customer UI users and responsibilities necessary to implement Oracle iStore.

You can create new users and responsibilities, and assign responsibilities as needed. See *Oracle Applications System Administrator's Guide*, *Oracle Applications CRM System Administrator's Guide*, and *Oracle Common Application Components Implementation Guide* for more information.

Main topics in this appendix include:

- [Section C.1, "Understanding Oracle Applications Responsibilities"](#)
- [Section C.2, "Oracle Forms Responsibilities for Oracle iStore Setup"](#)
- [Section C.3, "Oracle E-Business Suite Responsibilities for Oracle iStore Setup"](#)
- [Section C.4, "Oracle iStore Customer UI Responsibilities"](#)
- [Section C.5, "Oracle iStore Customer UI Roles and Permissions"](#)
- [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#)
- [Section C.7, "Site Management User Type Definitions"](#)
- [Section C.8, "Site Management User Registration Templates"](#)
- [Section C.9, "Site Management Profile Pages Permissions"](#)
- [Section C.10, "Permission Migration Script"](#)

## C.1 Understanding Oracle Applications Responsibilities

User names and responsibilities are set up in Oracle Applications to secure access to the data and functionality within the applications. The key element in Oracle Applications security is the definition of a responsibility. A responsibility defines:

- Application database privileges
- An application’s functionality that is accessible
- The concurrent programs and reports that are available

The system administrator defines application users and assigns one or more responsibilities to each user. In the Oracle iStore context, the system administrator may be you or another person.

See *Oracle Applications System Administrator’s Guide* and *Oracle Applications User’s Guide* for more information on how to set up user names and responsibilities.

All Oracle Applications products are installed with predefined responsibilities known as *seeded* responsibilities. Consult the implementation or reference guide for your Oracle Applications product for the names of those predefined responsibilities.

## C.2 Oracle Forms Responsibilities for Oracle iStore Setup

Access Oracle Forms by navigating to:

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

and selecting Apps Logon Links > VIS Logon through the Forms cartridge. Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle iStore in Oracle Forms.

**Table C–1 Oracle Forms Responsibilities**

Responsibility	Tasks
AK Developer	Define regions in Apps to troubleshoot Postsales errors.
Application Developer	Enable or disable B2B or B2C user registration. Modify specialty site text messages. Set up descriptive flexfields to appear on item detail pages. Set up comment flexfields to appear on the checkout page.



**Table C–1 Oracle Forms Responsibilities (Cont.)**

Responsibility	Tasks
Apps for the Web Manager	Define regions in Apps to troubleshoot Postsales errors.
General Ledger Super User	Set the daily currency conversion rate and create calendars in Oracle General Ledger for iStore Reports.
Inventory responsibility	Inventory setups.
iStore Concurrent Programs Responsibility	Schedule or run iStore concurrent programs
Order Management Super User	Set up Oracle Order Management.
Receivables Manager	Set up Oracle Receivables.
System Administrator	Set profile options. Set up Oracle iStore administrator and guest user accounts. Check the status of concurrent program requests. Set up credit card payments in Oracle iStore.

## C.3 Oracle E-Business Suite Responsibilities for Oracle iStore Setup

Access the Oracle E-Business Suite HTML login page at:

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

Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table, [Table C–2, "Oracle E-Business Suite HTML Applications Users and Responsibilities"](#), summarizes the user names and responsibilities necessary to perform setup and administrative tasks for Oracle iStore in Oracle CRM Applications.

**Table C–2 Oracle E-Business Suite HTML Applications Users and Responsibilities**

User	Responsibility	Tasks
<Site Manager User Account>	iStore Administrator IBE_ADMINSTRATOR  Logging in with this responsibility launches the Oracle iStore Site Administration UI.	All tasks within the Site Administration UI.

**Table C–2 Oracle E-Business Suite HTML Applications Users and Responsibilities**

User	Responsibility	Tasks
SYSADMIN	Foundation (HTML) Administration	Set up Oracle CRM System Administrator Console
	Logging in with this responsibility launches the Oracle CRM System Administrator Console.	Set up default roles and responsibilities for customer users.

## C.4 Oracle iStore Customer UI Responsibilities

At least one customer responsibility is assigned to each customer name when the name is approved during user registration. You can use the seeded IBE\_CUSTOMER responsibility and create other customer responsibilities too.

In a multiple operating unit environment, you need to create a customer responsibility for each operating unit if you want a customer to access only items from the Inventory Organization specific to each operating unit.

In the Site Administration UI, you can specify a list of the customer responsibilities that are supported by a given site. You can select these from all existing iStore responsibilities. You can also specify, for a given site, whether Oracle iStore checks the customer’s responsibilities and grants access only if the customer has an assigned responsibility that is supported by the site.

If multiple responsibilities are supported by a site, a customer who logs in to the site must choose one responsibility for that session. The responsibility uniquely identifies the operating unit against which any orders placed during the session will be booked. The responsibility is assigned only for the current session.

If you set up a site to check the customer’s responsibility, the customer can choose only from the responsibilities that have been assigned to him or her during registration. If the site is not set up to check the customer’s responsibility, then the customer can choose any supported responsibility in any site that does not check the customer’s assigned responsibilities.

The following table, [Table C–3, "Oracle iStore Customer UI Users and Responsibilities"](#), summarizes the responsibilities seeded by Oracle iStore for Web site customers to use in the Customer UI, located at:

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

**Table C–3 Oracle iStore Customer UI Users and Responsibilities**

User	Responsibility	Tasks
<Guest User Account>	IBE_CUSTOMER	The guest user name is assigned to every customer who browses the site without registering. You must assign the IBE_CUSTOMER responsibility or another customer responsibility as a default for guest users.
<Customer User Account>	IBE_CUSTOMER	Select IBE_CUSTOMER or another customer responsibility to be assigned by default to every registered customer.

## C.5 Oracle iStore Customer UI Roles and Permissions

This section lists the permissions that are shipped within each seeded user role. Sections include:

- [Section C.5.1, "Business User Role Seeded Permissions"](#)
- [Section C.5.2, "Primary User Role Seeded Permissions"](#)

See also: [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), and [Chapter 13, "Implementing User Management"](#)

### C.5.1 Business User Role Seeded Permissions

The following are the permissions seeded and supported in the B2B user role, iStore Business User Role (IBE\_BUSINESS\_USER\_ROLE). Note that several unsupported permissions may appear in this role out-of-the-box; the unsupported permissions are listed in [Section C.6.1, "iStore Permissions Not Supported"](#).

- [IBE\\_ASK\\_SALES\\_ASSISTANCE](#)
- [IBE\\_CANCEL\\_ORDER](#)
- [IBE\\_CHECKOUT](#)
- [IBE\\_CREATE\\_BILLTO\\_CONTACT\\_ADDRESS](#)
- [IBE\\_CREATE\\_ORDER](#)
- [IBE\\_CREATE\\_RETURN](#)
- [IBE\\_CREATE\\_SHIPTO\\_CONTACT\\_ADDRESS](#)
- [IBE\\_VIEW\\_INVOICE](#)

- [IBE\\_VIEW\\_NET\\_PRICE](#)
- [IBE\\_VIEW\\_ORDER](#)
- [IBE\\_VIEW\\_PAYMENT](#)
- [IBE\\_VIEW\\_RETURN\\_ORDER](#)
- [IBE\\_INT\\_ADMINISTRATORS](#)
- [IBE\\_INT\\_ORG\\_ADDRESS\\_BOOK](#)
- [IBE\\_INT\\_ORG\\_DETAILS](#)
- [IBE\\_INT\\_ORG\\_EMAIL\\_ADDRESSES](#)
- [IBE\\_INT\\_ORG\\_PHONE\\_NUMBERS](#)
- [IBE\\_INT\\_ORG\\_TELEX\\_NUMBERS](#)

**Note:** The B2B role for previous releases, IBE\_DEFAULT\_ROLE, is also seeded in Oracle iStore, for backward compatibility.

## C.5.2 Primary User Role Seeded Permissions

The following are the permissions seeded in the iStore Primary User Role (IBE\_PRIMARY\_USER\_ROLE). Note that several unsupported permissions may appear in this role out-of-the-box; the unsupported permissions are listed in [Section C.6.1, "iStore Permissions Not Supported"](#).

- [IBE\\_ASK\\_SALES\\_ASSISTANCE](#)
- [IBE\\_ASSIGN\\_SITES](#)
- [IBE\\_CANCEL\\_ORDER](#)
- [IBE\\_CHANGE\\_SHIPTO\\_CONTACT](#)
- [IBE\\_CHECKOUT](#)
- [IBE\\_CREATE\\_BILLTO\\_CONTACT\\_ADDRESS](#)
- [IBE\\_CREATE\\_ORDER](#)
- [IBE\\_CREATE\\_RETURN](#)
- [IBE\\_CREATE\\_SHIPTO\\_CONTACT\\_ADDRESS](#)
- [IBE\\_VIEW\\_INVOICE](#)
- [IBE\\_VIEW\\_NET\\_PRICE](#)

- IBE\_VIEW\_ORDER
- IBE\_VIEW\_PAYMENT
- IBE\_VIEW\_RETURN\_ORDER
- IBE\_INT\_ADMINISTRATORS
- IBE\_INT\_ASSIGN\_ACCOUNTS
- IBE\_INT\_ASSIGN\_ROLES
- IBE\_INT\_MANAGE\_CONTACT
- IBE\_INT\_MANAGE\_CONTACT\_INFO
- IBE\_INT\_ORG\_ADDRESS\_BOOK
- IBE\_INT\_ORG\_DETAILS
- IBE\_INT\_ORG\_EMAIL\_ADDRESSES
- IBE\_INT\_ORG\_PHONE\_NUMBERS
- IBE\_INT\_ORG\_TELEX\_NUMBERS
- IBE\_INT\_PENDING\_APPROVAL
- IBE\_INT\_PRIMARY\_USER
- IBE\_INT\_ROLE\_MANAGEMENT
- IBE\_INT\_UPDATE\_ORG\_DETAILS
- IBE\_INT\_USER\_MANAGEMENT
- JTF\_PRIMARY\_USER\_SUMMARY

## C.6 Oracle iStore B2B User Permissions Descriptions

This section describes the seeded role permissions that are supported for use in Oracle iStore.

**Note:** Some permissions enable certain UI objects to appear in the Customer UI, for the users with those permissions. For example, a user with IBE\_CHANGE\_BILLTO\_CONTACT permission will see a Change button in the shipping and billing information pages. Similarly, a customer with IBE\_CANCEL\_ORDER permission will see a Cancel button next to orders that are cancellable in the Order Tracker pages. For users without these permissions, these UI objects do not appear.

**Important:** Roles (and thus permissions) do not apply to B2C users. When they register, they automatically receive their default Customer UI permissions, which

are the same as the B2B permissions with a few exceptions in cart permissions. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.

Following are the supported B2B user permissions:

- [Section C.6.0.1, "Oracle iStore-Specific Permissions"](#)
- [Section C.6.0.2, "Common Permissions"](#)
- [Section C.6.0.3, "Oracle Common Application Components Permissions"](#)

### **C.6.0.1 Oracle iStore-Specific Permissions**

- [Section C.6.0.4, "IBE\\_ASK\\_SALES\\_ASSISTANCE"](#)
- [Section C.6.0.5, "IBE\\_ASSIGN\\_SITES"](#)
- [Section C.6.0.6, "IBE\\_BILLTO\\_ANY\\_ACCOUNT"](#)
- [Section C.6.0.7, "IBE\\_CANCEL\\_ORDER"](#)
- [Section C.6.0.8, "IBE\\_CANCEL\\_ORGANIZATION\\_ORDER"](#)
- [Section C.6.0.9, "IBE\\_CHANGE\\_BILLTO\\_CONTACT"](#)
- [Section C.6.0.10, "IBE\\_CHANGE\\_BILLTO\\_CUSTOMER"](#)
- [Section C.6.0.11, "IBE\\_CHANGE\\_SHIPTO\\_CONTACT"](#)
- [Section C.6.0.12, "IBE\\_CHANGE\\_SHIPTO\\_CUSTOMER"](#)
- [Section C.6.0.13, "IBE\\_CHECKOUT"](#)
- [Section C.6.0.14, "IBE\\_CREATE\\_BILLTO\\_CONTACT"](#)
- [Section C.6.0.15, "IBE\\_CREATE\\_BILLTO\\_CONTACT\\_ADDRESS"](#)
- [Section C.6.0.16, "IBE\\_CREATE\\_BILLTO\\_CUSTOMER"](#)
- [Section C.6.0.17, "IBE\\_CREATE\\_BILLTO\\_CUSTOMER\\_ADDRESS"](#)
- [Section C.6.0.18, "IBE\\_CREATE\\_ORDER"](#)
- [Section C.6.0.19, "IBE\\_CREATE\\_RETURN"](#)
- [Section C.6.0.20, "IBE\\_CREATE\\_SHIPTO\\_CONTACT"](#)
- [Section C.6.0.21, "IBE\\_CREATE\\_SHIPTO\\_CONTACT\\_ADDRESS"](#)
- [Section C.6.0.22, "IBE\\_CREATE\\_SHIPTO\\_CUSTOMER"](#)
- [Section C.6.0.23, "IBE\\_CREATE\\_SHIPTO\\_CUSTOMER\\_ADDRESS"](#)
- [Section C.6.0.24, "IBE\\_CREATE\\_SOLDTO\\_CUSTOMER"](#)

- Section C.6.0.25, "IBE\_IGNORE\_THRESHOLD"
- Section C.6.0.26, "IBE\_OVERRIDE\_ITEM\_PRICE"
- Section C.6.0.27, "IBE\_SHIPTO\_ANY\_ACCOUNT"
- Section C.6.0.28, "IBE\_USE\_ATTACHMENT"
- Section C.6.0.29, "IBE\_USE\_PRICING\_AGREEMENT"
- Section C.6.0.30, "IBE\_VIEW\_CUST\_WITHOUT\_ACCOUNT"
- Section C.6.0.31, "IBE\_VIEW\_INVOICE"
- Section C.6.0.32, "IBE\_VIEW\_NET\_PRICE"
- Section C.6.0.33, "IBE\_VIEW\_ORDER"
- Section C.6.0.34, "IBE\_VIEW\_PAYMENT"
- Section C.6.0.35, "IBE\_VIEW\_RETURN\_ORDER"

### **C.6.0.2 Common Permissions**

- Section C.6.0.36, "IBE\_INT\_ADMINISTRATORS"
- Section C.6.0.37, "IBE\_INT\_ASSIGN\_ACCOUNTS"
- Section C.6.0.38, "IBE\_INT\_ASSIGN\_ROLES"
- Section C.6.0.39, "IBE\_INT\_MANAGE\_CONTACT"
- Section C.6.0.40, "IBE\_INT\_MANAGE\_CONTACT\_INFO"
- Section C.6.0.41, "IBE\_INT\_ORG\_ADDRESS\_BOOK"
- Section C.6.0.42, "IBE\_INT\_ORG\_DETAILS"
- Section C.6.0.43, "IBE\_INT\_ORG\_EMAIL\_ADDRESSES"
- Section C.6.0.44, "IBE\_INT\_ORG\_PHONE\_NUMBERS"
- Section C.6.0.45, "IBE\_INT\_ORG\_TELEX\_NUMBERS"
- Section C.6.0.46, "IBE\_INT\_PENDING\_APPROVAL"
- Section C.6.0.47, "IBE\_INT\_PRIMARY\_USER"
- Section C.6.0.48, "IBE\_INT\_ROLE\_MANAGEMENT"
- Section C.6.0.49, "IBE\_INT\_UPDATE\_ORG\_DETAILS"
- Section C.6.0.50, "IBE\_INT\_USER\_MANAGEMENT"

### **C.6.0.3 Oracle Common Application Components Permissions**

- [Section C.6.0.51, "JTF\\_PRIMARY\\_USER\\_SUMMARY"](#)

### **C.6.0.4 IBE\_ASK\_SALES\_ASSISTANCE**

Allows a user to request sales assistance in the checkout phase, and to disagree with terms and conditions. If a user does not have this permission, he will not see the Need Salesrep Assistance button in the Order Review page, nor will he see the I disagree - Need Assistance button in the Review Terms and Conditions page.

### **C.6.0.5 IBE\_ASSIGN\_SITES**

Controls the ability by primary users to assign sites to other users in the Sites > Assign Access pages (within the Contact Management menu).

### **C.6.0.6 IBE\_BILLTO\_ANY\_ACCOUNT**

Allows a customer to search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer. Note that "all existing customers" is restricted to customers that have a valid party relationship of type 'CUSTOMER\_OF' with the sold-to customer, as well as any customer that has a billing account relationship with the sold-to customer.

### **C.6.0.7 IBE\_CANCEL\_ORDER**

Allows users to cancel their own orders that are in Booked or Entered state in Oracle Order Management. Enables the display of the Cancel Order button.

**Note:** If you wish to enable Cancel Order for B2B users who were created before Oracle Applications Release 11.5.8, you must manually add the IBE\_CANCEL\_ORDER permission to the user roles.

See also: [Section A.7.0.30, "IBE: Enable Order Cancellation in Order Tracker"](#), and [Section C.6.0.8, "IBE\\_CANCEL\\_ORGANIZATION\\_ORDER"](#).

### **C.6.0.8 IBE\_CANCEL\_ORGANIZATION\_ORDER**

Allows users to view and cancel orders for their current session operating unit and other operating units within their organization.

### **C.6.0.9 IBE\_CHANGE\_BILLTO\_CONTACT**

Allows a user to change the bill-to contact name from the default (if any) bill-to contact name. This permission works in tandem with IBE\_CHANGE\_BILLTO\_CUSTOMER.



**C.6.0.10 IBE\_CHANGE\_BILLTO\_CUSTOMER**

Allows a user to change the bill-to customer from the default bill-to customer.

**Note:** If you explicitly grant this permission to a user, you should also grant the IBE\_CHANGE\_BILLTO\_CONTACT permission to the user.

**C.6.0.11 IBE\_CHANGE\_SHIPTO\_CONTACT**

Allows a user to change the ship-to contact name from the default (if any) ship-to contact. This permission works in tandem with IBE\_CHANGE\_SHIPTO\_CUSTOMER.

**C.6.0.12 IBE\_CHANGE\_SHIPTO\_CUSTOMER**

Allows a user to change the ship-to customer from the default ship-to customer.

**Note:** If you explicitly grant this permission to a user, you should also grant the IBE\_CHANGE\_SHIPTO\_CONTACT permission to the user.

**C.6.0.13 IBE\_CHECKOUT**

Allows a user to see and use the Checkout button in shopping cart.

**C.6.0.14 IBE\_CREATE\_BILLTO\_CONTACT**

Allows the user to create a new contact name for the bill-to customer who will have a bill-to relationship with the bill-to customer.

**C.6.0.15 IBE\_CREATE\_BILLTO\_CONTACT\_ADDRESS**

Allows the user to create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact.

**C.6.0.16 IBE\_CREATE\_BILLTO\_CUSTOMER**

Allows a user to create a new customer with a billing relationship to the sold-to customer.

**C.6.0.17 IBE\_CREATE\_BILLTO\_CUSTOMER\_ADDRESS**

Allows the user to create a new address associated with the bill-to customer which will have a bill-to relationship with the bill-to customer.

#### **C.6.0.18 IBE\_CREATE\_ORDER**

Allows a user to submit a quote or cart as an order by pressing the Place Order button. If a user has this permission, ensure that he has the IBE\_CHECKOUT permission as well, since without IBE\_CHECKOUT the user will not see a Checkout button to enter the checkout phase.

#### **C.6.0.19 IBE\_CREATE\_RETURN**

Allows users to view and create returns from orders placed by themselves. Enables the Create Return button in the Returns summary page.

#### **C.6.0.20 IBE\_CREATE\_SHIPTO\_CONTACT**

Allows the user to create a new contact name for the ship-to customer who will have a ship-to relationship with the ship-to customer.

#### **C.6.0.21 IBE\_CREATE\_SHIPTO\_CONTACT\_ADDRESS**

Allows the user to create a new address associated with the ship-to contact which will have a ship-to relationship with the ship-to contact.

#### **C.6.0.22 IBE\_CREATE\_SHIPTO\_CUSTOMER**

Allows a user to create a new customer with a shipping relationship to the sold-to customer.

#### **C.6.0.23 IBE\_CREATE\_SHIPTO\_CUSTOMER\_ADDRESS**

Allows the user to create a new address associated with the ship-to customer which will have a ship-to relationship with the ship-to customer.

#### **C.6.0.24 IBE\_CREATE\_SOLDTO\_CUSTOMER**

Allows a user to create a new customer in the context of assigning a sold-to customer during quote creation.

#### **C.6.0.25 IBE\_IGNORE\_THRESHOLD**

Exempts a user from any Payment Threshold restrictions that are in place.

#### **C.6.0.26 IBE\_OVERRIDE\_ITEM\_PRICE**

Allows the user to override prices manually.

**C.6.0.27 IBE\_SHIPTO\_ANY\_ACCOUNT**

Allows a user to search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer. Note that "all existing customers" is restricted to customers that have a valid party relationship of type 'CUSTOMER\_OF' with the sold-to customer, as well as any customer that has a shipping account relationship with the sold-to customer.

**C.6.0.28 IBE\_USE\_ATTACHMENT**

Allows the user to attach files in the shopping cart. If using this permission, ensure that the profile option, IBE: Attachment Document Category, is set to MISC at the iStore application level.

**C.6.0.29 IBE\_USE\_PRICING\_AGREEMENT**

Allows the user to use pricing agreements. B2B users also must have IBE\_VIEW\_NET\_PRICE permission to see pricing agreements data.

**Note:** The profile option, IBE: Use Line Agreements, specifies whether B2B users with the IBE\_USE\_PRICING\_AGREEMENT permission can select pricing agreements at item level, in addition to the cart-level agreement selection enabled by the permission.

**C.6.0.30 IBE\_VIEW\_CUST\_WITHOUT\_ACCOUNT**

Allows a user to search on and retrieve existing customers without an account.

**C.6.0.31 IBE\_VIEW\_INVOICE**

Allows a user to view invoices related to the entire organization, through Order Tracker. Oracle iStore checks this permission only if the profile option, IBE: Use Auth Permissions in Order Tracker, is set to Yes.

**C.6.0.32 IBE\_VIEW\_NET\_PRICE**

Allows a user to see all prices (i.e. list prices, discount prices and net prices), instead of just Retail Price/Your Price in the shopping cart and Order Tracker pages. This permission does not affect the user's ability to view prices in the catalog. This permission also controls the pricing agreement, promotion code, and commitment functionalities in Oracle iStore. For users without this permission, it is recommended that they also not have the following permissions: IBE\_CHECKOUT, IBE\_CREATE\_ORDER, IBE\_CREATE\_RETURN, or IBE\_VIEW\_ORDER.

#### **C.6.0.33 IBE\_VIEW\_ORDER**

Allows a user to view orders placed on behalf of the entire organization, through Order Tracker. Oracle iStore checks this permission only if the profile option, IBE: Use Auth Permissions in Order Tracker, is set to Yes.

#### **C.6.0.34 IBE\_VIEW\_PAYMENT**

Allows a user to view payments related to the entire organization, through Order Tracker. Oracle iStore checks this permission only if the profile option, IBE: Use Auth Permissions in Order Tracker, is set to Yes.

#### **C.6.0.35 IBE\_VIEW\_RETURN\_ORDER**

Allows a user to view all returns placed within his organization in the Order Tracker pages. Only checked if the profile option, IBE: Use Auth Permissions in Order Tracker, is set to Yes.

#### **C.6.0.36 IBE\_INT\_ADMINISTRATORS**

Gives users permission to view primary users of the organization in the Company Profile screens.

#### **C.6.0.37 IBE\_INT\_ASSIGN\_ACCOUNTS**

Gives users permission to assign accounts in the User Management screens.

#### **C.6.0.38 IBE\_INT\_ASSIGN\_ROLES**

Gives users permission to assign roles in the User Management screens.

#### **C.6.0.39 IBE\_INT\_MANAGE\_CONTACT**

Gives users permission to create new and update existing organization contacts and users in the User Management screens.

#### **C.6.0.40 IBE\_INT\_MANAGE\_CONTACT\_INFO**

Gives users permission to update, create, and delete corporate addresses, e-mail addresses, phone numbers, and telex numbers in the Company Profile screens.

#### **C.6.0.41 IBE\_INT\_ORG\_ADDRESS\_BOOK**

Gives users permission to view company address book in the Company Profile screens.

**C.6.0.42 IBE\_INT\_ORG\_DETAILS**

Gives users permission to view organization details in the Company Profile screens.

**C.6.0.43 IBE\_INT\_ORG\_EMAIL\_ADDRESSES**

Gives users permission to view e-mail addresses of the company in the Company Profile screens.

**C.6.0.44 IBE\_INT\_ORG\_PHONE\_NUMBERS**

Gives users permission to view phone numbers of the company functionality in the Company Profile screens.

**C.6.0.45 IBE\_INT\_ORG\_TELEX\_NUMBERS**

Gives users permission to view telex numbers of the company in the Company Profile screens.

**C.6.0.46 IBE\_INT\_PENDING\_APPROVAL**

Gives users permission to approve users of the organization in the Pending Approval screens.

**C.6.0.47 IBE\_INT\_PRIMARY\_USER**

Gives users permission to identify a user as primary user in the Administration screens.

**C.6.0.48 IBE\_INT\_ROLE\_MANAGEMENT**

Gives users permission to create and update roles in the Role Management screens.

**C.6.0.49 IBE\_INT\_UPDATE\_ORG\_DETAILS**

Gives users permission to update organization details in the Company Profile screens.

**C.6.0.50 IBE\_INT\_USER\_MANAGEMENT**

Gives users permission to access User Management screens.

**C.6.0.51 JTF\_PRIMARY\_USER\_SUMMARY**

Oracle CRM Common Application Components permission which allows a primary user to approve pending registration requests.

## C.6.1 iStore Permissions Not Supported

The following permissions are not currently supported. Although they may appear in some seeded user roles, they are non-functional.

- IBE\_CREATE\_ADDRESS
- IBE\_CREATE\_PAYMENT\_INSTRUMENT
- IBE\_MODIFY\_CART
- IBE\_MODIFY\_ORDER
- IBE\_ROLE\_ADMIN
- IBE\_USER\_ADMIN
- IBE\_VIEW\_ADDRESS
- IBE\_VIEW\_PAYMENT\_INSTRUMENT
- IBE\_INT\_CONTACT\_DETAILS

## C.7 Site Management User Type Definitions

This section contains information on the seeded site management user type definitions for Oracle iStore, Oracle iSupport, and Oracle Partner Management which are supported in the Oracle iStore Customer UI.

**Note the following:**

- Only automatic (implicit) enrollments are supported, and no enrollment approval is required.
- All user types in this section are owned by or associated to Oracle iStore.
- iStore enrollments are owned by Oracle iStore; iSupport enrollments are owned by Oracle iSupport; partner enrollments are owned by Oracle Partner Management.
- All enrollments use the Generic Template.
- For a list of registration template seed data, see [Section C.8, "Site Management User Registration Templates"](#).
- See the *Oracle Common Application Components Implementation Guide's* User Management chapter for information about configuring user types, enrollments, and registration templates.

Topics include:

- [Section C.7.1, "Individual Users"](#)
- [Section C.7.2, "Non-Administrative B2B Users"](#)
- [Section C.7.3, "Primary B2B Users"](#)
- [Section C.7.4, "Partner Non-Administrative Users"](#)
- [Section C.7.5, "Partner Primary Users"](#)

## **C.7.1 Individual Users**

For individual (B2C) user registration, following is the seeded user type and the Oracle iStore and Oracle iSupport enrollments seeded within this user type:

- [Section C.7.1.1, "Individual User Type"](#)
- [Section C.7.1.2, "iStore Enrollment for B2C Users"](#)
- [Section C.7.1.3, "iSupport Enrollment for B2C Users"](#)

### **C.7.1.1 Individual User Type**

- User Type Name --- Register as individual
- Key --- IBE\_INDIVIDUAL
- Registration Template --- iStore Individual User
- Status --- Active
- Business Usage --- This user type is designed for B2C users who will be accessing either Oracle iStore alone, or if integrating Oracle iStore and Oracle iSupport in site management, also accessing Oracle iSupport.
- Approvals --- No approval required

### **C.7.1.2 iStore Enrollment for B2C Users**

- Enrollment Name --- iStore (Individual User)
- Key --- IBE\_INDIVIDUAL
- Responsibility --- IBE\_CUSTOMER
- Role --- None
- Status --- Enabled

### **C.7.1.3 iSupport Enrollment for B2C Users**

- Enrollment Name --- Support Site: Individual User
- Key --- IBU\_INDIVIDUAL\_USER
- Responsibility --- iSupport Site: Individual User
- Role --- IBU\_REGULAR\_USER
- Status --- Enabled

## **C.7.2 Non-Administrative B2B Users**

For non-administrative business (B2B) user registration, following is the seeded user type, along with the Oracle iStore and Oracle iSupport enrollments seeded within this user type:

- [Section C.7.2.1, "Regular Business User Type"](#)
- [Section C.7.2.2, "iStore Enrollment for Regular B2B Users"](#)
- [Section C.7.2.3, "iSupport Enrollment for Regular B2B Users"](#)

### **C.7.2.1 Regular Business User Type**

- User Type Name --- Register as a user of an existing company
- Key --- IBE\_BUSINESS
- Registration Template --- iStore Business User
- Status --- Active
- Business Usage --- This user type is designed for non-administrative B2B users who will be accessing either Oracle iStore alone, or if integrating Oracle iStore and Oracle iSupport in site management, also accessing Oracle iSupport.
- Approvals --- JTA User Approval

### **C.7.2.2 iStore Enrollment for Regular B2B Users**

- Enrollment Name --- iStore (Business User)
- Key --- IBE\_BUSINESS
- Responsibility --- IBE\_CUSTOMER
- Role --- IBE\_BUSINESS\_USER\_ROLE



- Status --- Enabled

### **C.7.2.3 iSupport Enrollment for Regular B2B Users**

- Enrollment Name --- Support Site: Business User
- Key --- IBU\_BUSINESS\_USER
- Responsibility --- iSupport Site: Business User
- Role --- IBU\_BUSINESS\_USER
- Status --- Enabled

## **C.7.3 Primary B2B Users**

For Primary (administrative) business (B2B) user registration, following is the seeded user type, along with the Oracle iStore and Oracle iSupport enrollments seeded within this user type:

- [Section C.7.3.1, "Primary B2B User Type"](#)
- [Section C.7.3.2, "iStore Enrollment for B2B Primary Users"](#)
- [Section C.7.3.3, "iSupport Enrollment for B2B Primary Users"](#)

### **C.7.3.1 Primary B2B User Type**

- User Type Name --- Register your company
- Key --- IBE\_PRIMARY
- Registration Template --- iStore Primary User
- Status --- Active
- Business Usage --- This user type is designed for B2B administrative (primary) users who will be accessing either Oracle iStore alone, or if integrating Oracle iStore and Oracle iSupport in site management, also accessing Oracle iSupport. Organizations for these users have not yet been registered in the system.
- Approvals --- No approval is required

### **C.7.3.2 iStore Enrollment for B2B Primary Users**

- Enrollment Name --- iStore (Primary User)

- Key --- IBE\_PRIMARY
- Responsibility --- IBE\_CUSTOMER
- Role --- IBE\_BUSINESS\_USER\_ROLE and IBE\_PRIMARY\_USER\_ROLE
- Status --- Enabled

### **C.7.3.3 iSupport Enrollment for B2B Primary Users**

- Enrollment Name --- Support Site: Primary User
- Key --- IBU\_PRIMARY\_USER
- Responsibility --- iSupport Site: Primary User
- Role --- IBU\_PRIMARY\_USER and IBU\_BUSINESS\_USER
- Status --- Enabled

## **C.7.4 Partner Non-Administrative Users**

For Oracle Partner Management non-administrative business (B2B) user registration, following is the seeded user type, along with the Oracle iStore and Oracle Partner Management enrollments seeded within this user type:

- [Section C.7.4.1, "Regular B2B Partner User Type"](#)
- [Section C.7.4.2, "iStore Enrollment for Regular B2B Partner Users"](#)
- [Section C.7.4.3, "Partner Enrollment for Regular B2B Partner Users"](#)

### **C.7.4.1 Regular B2B Partner User Type**

- User Type Name --- Register as a user of an existing partner
- Key --- IBE\_PARTNER\_BUSINESS
- Registration Template --- Partner Business User
- Status --- Inactive
- Business Usage --- This user type is designed Oracle Partner Management B2B non-administrative users who will be accessing both Oracle iStore and Oracle Partner Management.
- Approvals --- JTF User Approval

#### **C.7.4.2 iStore Enrollment for Regular B2B Partner Users**

- Enrollment Name --- iStore (Business User)
- Key --- IBE\_BUSINESS
- Responsibility --- IBE\_CUSTOMER
- Role --- IBE\_BUSINESS\_USER\_ROLE
- Status --- Enabled

#### **C.7.4.3 Partner Enrollment for Regular B2B Partner Users**

- Enrollment Name --- Partner Business User
- Key --- PV\_BUSINESS\_USER
- Responsibility --- Partner Business User
- Role --- PV\_PARTNER\_BUSINESS\_USER
- Status --- Enabled

### **C.7.5 Partner Primary Users**

For Oracle Partner Management Primary (administrative) business (B2B) user registration, following is the seeded user type, along with the Oracle iStore and Oracle Partner Management enrollments seeded within this user type:

- [Section C.7.5.1, "Partner Primary User Type"](#)
- [Section C.7.5.2, "iStore Enrollment for Partner Primary Users"](#)
- [Section C.7.5.3, "Partner Enrollment for Partner Primary Users"](#)

#### **C.7.5.1 Partner Primary User Type**

- User Type Name --- Register as a partner
- Key --- IBE\_PARTNER\_PRIMARY
- Registration Template --- Partner Primary User
- Status --- Inactive
- Business Usage --- This user type is designed for Oracle Partner Management B2B administrative users (primary users) who will be accessing both Oracle iStore and Oracle Partner Management.

- Approvals --- No approval is required

#### **C.7.5.2 iStore Enrollment for Partner Primary Users**

- Enrollment Name --- iStore (Business User)
- Key --- IBE\_BUSINESS
- Responsibility --- IBE\_CUSTOMER
- Role --- IBE\_BUSINESS\_USER\_ROLE
- Status --- Enabled

#### **C.7.5.3 Partner Enrollment for Partner Primary Users**

- Enrollment Name --- Partner Primary User
- Key --- PV\_PRIMARY\_USER
- Responsibility --- Partner Primary User
- Role --- PV\_PARTNER\_PRIMARY\_USER and PV\_PARTNER\_BUSINESS\_USER
- Status --- Enabled

**Important:** For the most current information on seeded user data for Oracle Partner Management and Oracle iSupport, see the product documentation for these applications.

## **C.8 Site Management User Registration Templates**

Following is the data for the user registration templates used for site management. For user management Display Templates, see [Section E.13, "User Management Display Templates"](#).

- [Section C.8.1, "iStore Individual User Registration Template"](#)
- [Section C.8.2, "iStore Regular B2B User Registration Template"](#)
- [Section C.8.3, "iStore Primary B2B User Registration Template"](#)
- [Section C.8.4, "Partner Regular B2B User Registration Template"](#)
- [Section C.8.5, "Partner Primary B2B User Registration Template"](#)

### C.8.1 iStore Individual User Registration Template

- Template Name --- iStore Individual User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE\_INDIVIDUAL
- Template Status --- Enabled
- Template Handler --- oracle.apps.ibe.um.RegisterIndividual
- Page Name --- ibeCZzpGetTemplateFile.jsp?tmp=STORE\_REG\_CONTAINER\_D&usertype\_template=STORE\_REG\_B2C\_CREATE\_D

### C.8.2 iStore Regular B2B User Registration Template

- Template Name --- iStore Business User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE\_BUSINESS
- Template Status --- Enabled
- Template Handler --- oracle.apps.ibe.um.RegisterBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?tmp=STORE\_REG\_CONTAINER\_D&usertype\_template=STORE\_REG\_BUSINESS\_CREATE\_D

### C.8.3 iStore Primary B2B User Registration Template

- Template Name --- iStore Primary User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE\_PRIMARY
- Template Status --- Enabled
- Template Handler --- oracle.apps.ibe.um.RegisterBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?tmp=STORE\_REG\_CONTAINER\_D&usertype\_template=STORE\_REG\_PRI\_CREATE\_D

### C.8.4 Partner Regular B2B User Registration Template

- Template Name --- Partner Business User
- Template Type --- USERTYPE TEMPLATE

- Template Key --- IBE\_PARTNER\_BUSINESS
- Template Status --- Enabled
- Template Handler --- oracle.apps.ibe.um.RegisterPartnerBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?tmp=STORE\_REG\_CONTAINER\_D&usertype\_template=STORE\_REG\_BUSPARTNER\_CREATE\_D

### C.8.5 Partner Primary B2B User Registration Template

- Template Name --- Partner Primary User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE\_PARTNER\_PRIMARY
- Template Status --- Enabled
- Template Handler --- oracle.apps.ibe.um.RegisterPartnerBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?tmp=STORE\_REG\_CONTAINER\_D&usertype\_template=STORE\_REG\_PARTNER\_CREATE\_D

## C.9 Site Management Profile Pages Permissions

This section contains information about site management user permissions involved in controlling the profile pages in the Customer UI.

For information about the script which automatically updates existing roles with new permissions, see [Section C.10, "Permission Migration Script"](#).

Topics include:

- [Section C.9.1, "Profile Pages Permissions Overview"](#)
- [Section C.9.2, "Permissions for User Pages"](#)
- [Section C.9.3, "Permissions for Company Pages"](#)
- [Section C.9.4, "Permissions for Administration Pages"](#)
- [Section C.9.5, "Roles and Permissions Combinations for Oracle iStore"](#)
- [Section C.9.6, "Roles and Permissions Combinations for Oracle iSupport"](#)
- [Section C.9.7, "Roles and Permissions Combinations for Oracle Partner Management"](#)

## C.9.1 Profile Pages Permissions Overview

Functionality within the Administration (user management) and Profile screens can be controlled through permissions within the roles awarded to B2B users. Each role is associated to a set of permissions. For B2C users, permissions are not used; thus, B2C users always see the same set of screens.

When integrating with other applications, different menus for each application can be configured for Profile and Administration functionality. To enable the menus, each menu is associated in Oracle Forms to the corresponding application responsibility. Each menu *function* is associated to a specific permission. For more information on integrating with Oracle iSupport and Oracle Partner Management, see [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#), and [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#). In a common implementation, the menus are the same in each application.

In an integrated environment, access to common screens is controlled by permissions that are shared across the different primary and non-primary users' roles. Screens that are application-specific are associated to permissions that should be assigned only to the appropriate roles.

Following are the codes used within the permissions:

- INT is used within all common permissions
- IBE prefixes Oracle iStore permissions
- IBU prefixes Oracle iSupport permissions
- PV prefixes Oracle Partner Management permissions

Oracle iStore B2C users typically are associated to the IBE\_CUSTOMER responsibility, which is tied to a generic menu associated to user pages within the Profile menu. Further permissions within the B2B roles allow access to specific application functions, such as Company Profile and user administration functionality. Typically, only users with the iStore Business User role can access the Company Profile screens. And, by default, only users with iStore Primary User role can access the Administration screens.

Additional access to functionality in the Profile pages can be provided for users of Oracle iSupport and Oracle Partner Management, by assigning the permissions that correspond to the functionality desired. See [Section C.9.6, "Roles and Permissions Combinations for Oracle iSupport"](#), and [Section C.9.7, "Roles and Permissions Combinations for Oracle Partner Management"](#), for recommended setups.

By default, any user registering using *Register as individual*, *Register your company*, and *Register as a user of an existing company* user types will receive the same level of Profile page permissions in Oracle iStore.

## C.9.2 Permissions for User Pages

Following are the user Profile page permissions for Oracle iSupport and Oracle Partner Relationship Management. No specific permissions are needed for Oracle iStore users to access these pages.

### Oracle iSupport:

- **IBU\_UPDATE\_SUPPORT\_PREFERENCES** --- Ability to set support preferences, such as those for subscriptions and forums
- **IBU\_VIEW\_SUPPORT\_PREFERENCES** --- Ability to view support preferences
- 

### Oracle Partner Management:

- **PV\_PARTNER\_USER\_PROFILE** --- Ability to access and update partner attributes associated to the partner user
- **PV\_SALES** --- Ability to set sales preferences
- **PV\_VIEWS** --- Ability to set default searches and delete them

## C.9.3 Permissions for Company Pages

Following are the permissions for company Profile pages. The code INT is included in common permissions. See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for descriptions of the common permissions.

### Common Permissions:

- [IBE\\_INT\\_ORG\\_DETAILS](#)
- [IBE\\_INT\\_ADMINISTRATORS](#)
- [IBE\\_INT\\_ORG\\_ADDRESS\\_BOOK](#)
- [IBE\\_INT\\_ORG\\_EMAIL\\_ADDRESSES](#)
- [IBE\\_INT\\_ORG\\_PHONE\\_NUMBERS](#)
- [IBE\\_INT\\_ORG\\_TELEX\\_NUMBERS](#)
- [IBE\\_INT\\_UPDATE\\_ORG\\_DETAILS](#)



- [IBE\\_INT\\_MANAGE\\_CONTACT\\_INFO](#)

**Oracle Partner Management:**

- **PV\_PARTNER\_ORG\_PROFILE** --- Ability to view and update partner profile for the organization
- **PV\_VIEW\_MEMBERSHIPS** --- Ability to view memberships
- **PV\_UPDATE\_MEMBERSHIP** --- Ability to view and upgrade/renew membership
- **PV\_CHANNEL\_TEAM** --- Ability to view channel team screen

## C.9.4 Permissions for Administration Pages

Following are the permissions for administration pages. The code INT is included in common permissions. See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for descriptions of the common and Oracle iStore permissions.

**Common Permissions:**

- [IBE\\_INT\\_USER\\_MANAGEMENT](#)
- [IBE\\_INT\\_MANAGE\\_CONTACT](#)
- [IBE\\_INT\\_PENDING\\_APPROVAL](#)
- [IBE\\_INT\\_ROLE\\_MANAGEMENT](#)
- [IBE\\_INT\\_MANAGE\\_CONTACT\\_INFO](#)
- [IBE\\_INT\\_ASSIGN\\_ROLES](#)
- [IBE\\_INT\\_ASSIGN\\_ACCOUNTS](#)
- [IBE\\_INT\\_PRIMARY\\_USER](#)

**Oracle iStore:**

- [IBE\\_ASSIGN\\_SITES](#)

**Oracle Partner Management:**

- **PV\_PARTNER\_PROFILE** --- Ability to view partner user profile
- **PV\_PARTNER** --- Necessary for the framework to identify users as partner users

## C.9.5 Roles and Permissions Combinations for Oracle iStore

Following are the typical page/permission assignments for Oracle iStore users in the Profile pages.

### C.9.5.1 Individual Users (B2C)

Oracle iStore does not require roles and permissions for B2C users. B2C users will always be able to access the following pages:

#### User Pages

- Personal Information -- Details
- Contact Information -- Address Book (view and update); E-mail Addresses (view and update); Phone Numbers (view and update)
- Payment Book
- Accounts
- Preferences -- General; Orders

### C.9.5.2 Business Users (B2B)

Within the default iStore Business User role, all B2C user pages permissions exist, plus additional ones for viewing company information. See [Section C.9.3, "Permissions for Company Pages"](#).

#### Company Pages

- Company Information -- Details (view and update)
- Contact Information -- Address Book (view and update); E-mail Addresses (view and update); Phone Numbers (view and update); Telex (view and update)
- Administrators -- View a list of primary users

### C.9.5.3 Primary Users

For the default Primary User role, all B2B regular user and company pages permissions exist, plus additional ones for user administration pages.

#### Administration Pages

- User Management -- Users Summary; Create User; Update User: Details, Roles, Sites, Accounts
- Pending Approvals

- Role Management

## C.9.6 Roles and Permissions Combinations for Oracle iSupport

In an integrated environment, Oracle iSupport users should be assigned appropriate permissions to get access to the following functions, if business requirements comply:

### C.9.6.1 IBU\_REGULAR\_USER

For the B2C users, all existing Oracle iSupport permissions can be assigned, plus other to access the following information:

- Support -- Subscriptions, Forums; see [Section C.9.2, "Permissions for User Pages"](#)

### C.9.6.2 IBU\_BUSINESS\_USER

For regular B2B users, all B2C permissions can be assigned, plus new ones to access the following information:

**User Pages** -- see [Section C.9.2, "Permissions for User Pages"](#)

- Personal Information -- Details, Change Password
- Contact Information -- Address Book; E-mail Addresses; Phone Numbers
- Accounts

**Company Pages** -- see [Section C.9.3, "Permissions for Company Pages"](#)

- Company Information --- Details
- Contact Information --- Address Book; E-mail Addresses; Phone Numbers; Telex
- Administrators

### C.9.6.3 IBU\_PRIMARY\_USER

For the integration, assign all existing Oracle iSupport regular business user permissions, plus new ones to access the user administration pages:

**Administration Pages** -- see [Section C.9.4, "Permissions for Administration Pages"](#)

- User Management
- Users Summary

- Create User
- Update User --- Details, Roles, Enrollments, Accounts
- Pending Approvals
- Role Management

## C.9.7 Roles and Permissions Combinations for Oracle Partner Management

For integration with Oracle Partner Relationship Management, the partner roles should be assigned appropriate permissions to get access to the following functions:

### C.9.7.1 PV\_BUSINESS\_USER

Assign all existing Partner permissions, plus the new ones to access the following information:

**User Pages** -- see [Section C.9.2, "Permissions for User Pages"](#)

- Personal Information -- Details; Change Password
- Contact Information --- Address Book; E-mail Addresses; Phone Numbers
- Preferences --- Communications; Sales; Views

**Company Pages** -- see [Section C.9.3, "Permissions for Company Pages"](#)

- Company Information --- Details; Additional Information, Partner Profile
- Contact Information --- Address Book; E-mail Addresses; Phone Numbers; Telex
- Administrators
- Memberships --- View only
- Channel Team

### C.9.7.2 PV\_PRIMARY\_USER

Assign all regular Partner user permissions for user and company pages, plus new ones to access the user administration pages:

**Administration Pages** -- see [Section C.9.4, "Permissions for Administration Pages"](#)

- User Management
- Users Summary
- Create User

- Update User --- Details, Roles, Accounts, Partner Profile
- Pending Approvals

## C.10 Permission Migration Script

In Release 11.5.10, Oracle iStore seeds several new permissions designed to accommodate the integration of other applications, such as Oracle iSupport and Oracle Partner Management, into the site management functionality. These permissions contain the code, INT. Additionally, several Oracle iStore-specific user permissions have been added, and several have been obsoleted.

The iStore Permission Migration script maps new Release 11.5.10 permissions to all existing roles. The SQL script runs automatically when the Release 11.5.10 patch is applied. This supplies all existing users (pre-Release 11.5.10) with the necessary permissions to access their intended functionality in the Customer UI. The seeding is done for all roles which contain at least one of the Oracle iStore (IBE) permissions, including custom roles.

The following table, [Table 34–7, "Release 11.5.10 Permission Mapping to Pre-Release Permissions"](#), shows the permission migration information.

**Table 34–7 Release 11.5.10 Permission Mapping to Pre-Release Permissions**

Component	Permission Description	Pre-R11510 Permission	New Permissions
Sales Assistance	Permission to request sales assistance and to reject terms and conditions	None	<a href="#">IBE_ASK_SALES_ASSISTANCE</a>
Checkout	Permission to checkout	None	<a href="#">IBE_CHECKOUT</a>
Pricing	Permission to view discount prices	None	<a href="#">IBE_VIEW_NET_PRICE</a>
User Management	Permission to create User Management screens	IBE_USER_ADMIN	<a href="#">IBE_INT_USER_MANAGEMENT</a>
User Management	Permission to create/update new contact and user	IBE_USER_ADMIN	<a href="#">IBE_INT_MANAGE_CONTACT</a>
User Management	Permission to view contact details	IBE_USER_ADMIN	BE_INT_CONTACT_DETAILS (unsupported)
User Management	Permission to assign roles	IBE_USER_ADMIN	<a href="#">IBE_INT_ASSIGN_ROLES</a>
User Management	Permission to assign accounts	IBE_USER_ADMIN	<a href="#">IBE_INT_ASSIGN_ACCOUNTS</a>

**Table 34–7 Release 11.5.10 Permission Mapping to Pre-Release Permissions**

Component	Permission Description	Pre-R11510 Permission	New Permissions
User Management	Permission to assign sites	IBE_USER_ADMIN	<a href="#">IBE_ASSIGN_SITES</a>
Pending Approval	Permission to approve user registration	IBE_USER_ADMIN	<a href="#">IBE_INT_PENDING_APPROVAL</a>
Primary User	Permission to approve user registration	IBE_USER_ADMIN	<a href="#">JTF_PRIMARY_USER_SUMMARY</a>
Primary User	Permission to identify users as primary user	IBE_USER_ADMIN	<a href="#">IBE_INT_PRIMARY_USER</a>
Role Management	Permission to create and update roles	IBE_ROLE_ADMIN	<a href="#">IBE_INT_ROLE_MANAGEMENT</a>
Company Profile	Permission to view organization detail	All roles which have IBE permissions	<a href="#">IBE_INT_ORG_DETAILS</a>
Company Profile	Permission to view organization primary users	All roles which have IBE permissions	<a href="#">IBE_INT_ADMINISTRATORS</a>
Company Profile	Permission to view address book	All roles which have IBE permissions	<a href="#">IBE_INT_ORG_ADDRESS_BOOK</a>
Company Profile	Permission to view email addresses screen	All roles which have IBE permissions	<a href="#">IBE_INT_ORG_EMAIL_ADDRESSES</a>
Company Profile	Permission to view phone numbers screens	All roles which have IBE permissions	<a href="#">IBE_INT_ORG_PHONE_NUMBERS</a>
Company Profile	Permission to view Telex numbers screens	All roles which have IBE permissions	<a href="#">IBE_INT_ORG_TELEX_NUMBERS</a>
Company Profile	Permission to update organization details	IBE_USER_ADMIN	<a href="#">IBE_INT_UPDATE_ORG_DETAILS</a>
Company Profile	Permission to update, create, delete corporate addresses, email and phone numbers	IBE_USER_ADMIN	<a href="#">IBE_INT_MANAGE_CONTACT_INFO</a>

---

## Advanced Display

This appendix contains information on advanced display functionality in Oracle iStore 11i.

Also refer to the *Oracle iStore API Reference Guide*.

Main topics in this appendix include:

- [Section D.1, "Advanced Content Tasks"](#)
- [Section D.2, "Descriptive Flexfield Support"](#)
- [Section D.3, "Display Template Mappings Import and Export"](#)
- [Section D.4, "Advanced Product Relationships Procedures"](#)
- [Section D.5, "Using Display Styles for Default Display"](#)
- [Section D.6, "Deep Linking Support"](#)
- [Section D.7, "Customizing Templates"](#)
- [Section D.8, "Understanding Catalog Flow"](#)
- [Section D.9, "Customizing Section Templates"](#)
- [Section D.10, "Customizing Item Templates"](#)
- [Section D.11, "Customizing the Style Sheet"](#)
- [Section D.12, "Customizing Help"](#)
- [Section D.13, "API Documentation"](#)

## D.1 Advanced Content Tasks

This section contains advanced tasks to assign content (for example, images, HTML files) in your specialty sites.

See [Section 9.2, "Understanding Content Components"](#), for an introduction to content components.

Main topics in this section include:

- [Section D.1.1, "Creating New Content Components"](#)
- [Section D.1.2, "Assigning Media Objects to Content Components at the Site Level"](#)

### D.1.1 Creating New Content Components

Use this procedure to create a new content component.

Remember, to use a newly created content component, you must customize the JSP where it will appear.

#### Steps

1. Log in to the Site Administration UI and select Advanced > Content Components. The Content Components page displays a list of existing content components.

For a list of seeded content components, see [Section 9.2.1, "Seeded Content Components"](#).

2. Select Create Content Component. The Create Content Component page appears. Enter information about the content component into the following fields:
  - **Component Name** --- Enter a descriptive name for the content component. This name will not appear in the Customer UI.
  - **Programmatic Access Name** --- Enter a unique value in the textbox. This will be the value you enter into the JSP call to the content component. An error message will display if you do not enter a unique name.
  - **Description** --- Optionally, enter a description for the content component. This description will not appear in the Customer UI, and is for your internal business purposes only.



- **Class** --- Select a class for the content component, based on its display purpose. See [Section 9.1.2.1, "Seeded Content Component Classes"](#), for guidelines.
3. Press Apply to save changes. The screen refreshes, and now is called Update Content Component.

A new textbox appears, called Default, with a Content section below it. Since this is a new content component with no content mapped, then no information will display in the Content area. After you map content to the media object associated with the content component, the Content area will be populated, and the View Mapping and Add Content buttons will be active.

4. Map a media object to the content component: Select the flashlight icon to next to the Default textbox to launch the Search and Select: Media Object screen. Search for and select a media object to use with the content component.
  - For full steps, see [Section D.1.2, "Assigning Media Objects to Content Components at the Site Level"](#).
  - To understand the relationship between content components and media objects, see [Section 9.1, "Content Overview"](#).

Optionally, select the Create Media Object icon and create a new media object to associate with the content component. See [Section 9.3.3, "Creating New Media Objects"](#), for steps.

5. Map content to the media object at the product, section, or category level. See [Section 9.1, "Content Overview"](#), to begin understanding this process.
6. Create and register a new Display Template using the steps in [Section D.7.5, "Creating New Templates"](#), and [Section D.7.6, "Registering New Templates in the Template Manager"](#).
7. In the newly created Display Template, enter the programmatic access name of the new content component in the Display Manager API.

## D.1.2 Assigning Media Objects to Content Components at the Site Level

Use this procedure to assign media objects to content components at the site level. To understand media objects in Oracle iStore, begin with [Section 9.1, "Content Overview"](#).

You can assign content components to media objects at the Product or Section levels as well. See [Section 8.8, "Creating and Maintaining Sections"](#), for details.

## Steps

1. Log in to the Site Administration UI and select **Advanced > Content Components**. The Content Components page displays a list of existing content components.

For a list of seeded content components, see [Section 9.2.1, "Seeded Content Components"](#).

2. Once you have located the content component that you wish to map to a media object, select the Update icon in the applicable content component row. The Update Content Component page appears.
3. In the Default field, select the flashlight icon to retrieve the Search and Select: Media Object page.

**Note:** You can enter partial values in the Default textbox to narrow the results that are returned in the Search and Select: Media Object page when you select the flashlight icon; text entered should be based on media object name.

4. In the Search and Select: Media Object page, select the radio button of the media object you wish to map to the content component. Press the Select button to save the selection.

You will return to the Update Content Component page.

5. At the bottom of the Update Content Component page, the Content area allows you to map content files to the media object selected above.

If you haven't done so already, then map the media object you have selected to a source file or files. You can map content to media objects using the following navigation paths and steps:

- **Content > Media Objects:** See [Section 9.3.4, "Assigning Content Items to Media Objects"](#).
  - **Catalog > Sections > Content:** See [Section 8.8.5, "Adding Content to Sections"](#).
  - **Catalog > Products > Content:** See [Section 8.9.6, "Setting Content at the Product Level"](#).
6. To allow the media object to retrieve site-specific and/or language-specific content, in the Content > Media Object page, map the media object to different combination of sites and languages.

## D.2 Descriptive Flexfield Support

Descriptive flexfields (DFFs) allow users to extend Oracle applications to meet business requirements without the need for programming. You can use descriptive flexfields in the Oracle iStore Customer UI to gather information, important and unique to your business, that would not otherwise be captured.

Note that this document contains DFF setup and user information related directly to Oracle iStore. For complete details about flexfields, see the *Oracle Applications Flexfields Guide*.

This section contains the following main topics:

- [Section D.2.1, "Overview of DFFs in Oracle iStore"](#)
- [Section D.2.2, "DFF Process Flows"](#)
- [Section D.2.3, "Behavior and Guidelines for DFFs"](#)
- [Section D.2.4, "Implementing DFFs in Oracle iStore"](#)
- [Section D.2.5, "Sample Setup Displaying Different DFF Levels per Site"](#)

### D.2.1 Overview of DFFs in Oracle iStore

Oracle iStore merchants can capture information from customers in the shopping cart and payment pages by setting up Oracle Order Capture DFFs. Two of Oracle iStore's product detail templates also support Oracle Inventory DFFs. After you set up DFFs in Oracle Forms, Oracle iStore uses its own JSPs --- along with Oracle CRM Technology Foundation APIs and renderers --- to display the fields in the UI. Merchants can utilize Oracle Order Capture DFFs to capture information that cannot be captured through defined order attributes. The information passes into the Oracle Order Management system and is viewable in the sales order forms when Order Management DFFs are enabled.

Following are the supported Customer UI areas for using DFFs:

1. In the Your Shopping Cart page, a link entitled *Additional Information* allows customers to populate Order Capture DFFs at the cart and item levels.
2. In the Payment and Billing Information page, customers can enter cart-level Order Capture DFF information, or edit information carried over from the Additional Information cart-level entries.
3. Three product Display Templates support the use of Inventory DFFs. With this option, the Display Templates display the prompt and the value of descriptive flexfield global segments, if a value is defined for the item.

### D.2.1.1 Use Case Examples

- Use DFFs in the shopping cart to allow customers to enter gift wrapping requests for a product, such as gift wrap colors and greetings to be shipped with the product.
- Set up a DFF that allows customers to enter a preferred sales representative name; the order administrator could use the information to assign the correct sales representative.
- Implement DFF fields that allow customers to enter optional information that could be used for marketing additional services to them.
- Set up DFFs for product detail templates that allow users to enter additional information for a particular product, such as entering sizes or colors for a shirt.

## D.2.2 DFF Process Flows

The following flows depict how customers enter, edit, and remove cart-level and item-level DFF information.

- [Section D.2.2.1, "Flow for Entering Cart-Level Information from Your Shopping Cart Page"](#)
- [Section D.2.2.2, "Flow for Entering Item-Level Information from Your Shopping Cart Page"](#)
- [Section D.2.2.3, "Flow for Editing or Replacing Information from Your Shopping Cart Page"](#)
- [Section D.2.2.3, "Flow for Editing or Replacing Information from Your Shopping Cart Page"](#)
- [Section D.2.2.4, "Flow for Entering Cart-Level Information from Payment and Billing Information Page"](#)

### D.2.2.1 Flow for Entering Cart-Level Information from Your Shopping Cart Page

1. A user visits a site and adds one or more items to the shopping cart.
2. The user selects the Additional Information link in the Your Shopping Cart page.
3. From the View LOV, the user selects Cart Level, and presses Go.

**Note:** The View LOV will only display if both cart- and item-level DFFs have been implemented. If only one of the types has been implemented, the user will not have the option of selecting from a list.

4. In the Cart Information area, the user enters relevant data in the DFF fields. The user will be required to enter appropriate information in fields that the merchant has marked as required in the Oracle Forms setup screens. These fields will display an asterisk (\*) next to them.
5. The user selects Apply to save the data. The Your Shopping Cart, Additional Information page is displayed.
6. To return to the Your Shopping Cart, Items page, the user selects the Items link.

The following figure, [Figure D-1, "Cart Information Page Example"](#), shows an example of how the Cart Information page might look in an implementation of Oracle iStore. Since the information is being entered at the cart level, no item information displays.

**Figure D-1 Cart Information Page Example**

**Your Shopping Cart**

Items Additional Information Pricing Agreements Promotion Codes Attachments Check Availability

View

**Cart Information**

\* Indicates required field

Customer Status:

Context Value:

Number of employees:

\* Payment Type:

\* Credit Card Type:

### D.2.2.2 Flow for Entering Item-Level Information from Your Shopping Cart Page

1. A user visits a site and adds one or more items to the shopping cart.
2. The user selects the Additional Information link in the Your Shopping Cart page.
3. From the View LOV, the user selects Item Level, and presses Go.

**Note:** The View LOV will only display if both cart- and item-level DFFs have been implemented. If only one of the types has been implemented, the user will not have the option of selecting from a list.

- 4. In the Item Information area, individual items from the active shopping cart display. Items which already have DFF information associated with them will shown an active icon in the Item Information column.

The following figure, [Figure D–2, "Item Information Page Example"](#), shows an example of how the Item Information page might look in an implementation of Oracle iStore. Notice that the items with DFF information already entered display an active icon in the Item Information column.

**Figure D–2** Item Information Page Example

Your Shopping Cart

Items

Additional Information

Pricing Agreements

Promotion Codes

Attachments

Check Availability

View 

Item Information

Go

Item Information

☒ When assigning information, select only items that do not contain any existing information. Use the highlighted item icon to edit existing information.








Select Item(s) and ...

Clear Information

Assign Information

Select All

Select None

Select	Part Number	Item	UOM	Quantity	Item Information
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	
<input type="checkbox"/>	AS66311	<a href="#">Vision Pad DX - Mobile Computer</a>	Each	1	

**Note:** For model bundles, configured items, and serviceable items, users can only enter DFF information for the parent item.

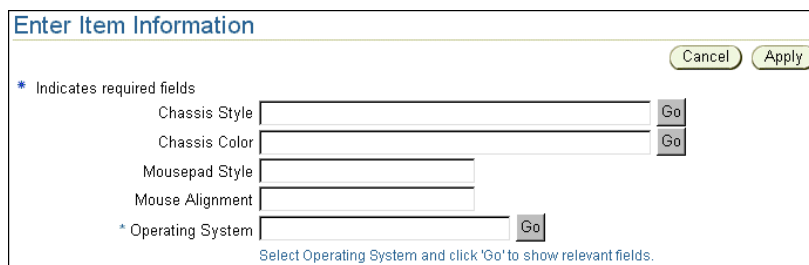
- 5. For the items the user wishes to enter information, he selects the appropriate checkboxes and presses the Assign Information button.

The following rules apply:

- Users can enter information for several items at a time. However, when entering information for several items at a time, any existing DFF entries for the selected items will be overwritten by the new data that the user enters.
  - If information exists for a specific item, the user does have the option replacing the information. See [Section D.2.2.3, "Flow for Editing or Replacing Information from Your Shopping Cart Page"](#)
6. In the Enter Item Information page, the user enters relevant data in the DFF fields. The user will be required to enter appropriate information in fields that the merchant has marked as required in the Oracle Forms setup screens. These fields will display an asterisk (\*) next to them.

The following figure, [Figure D–3, "Enter Item Information Page Example"](#), shows an example of how the Enter Item Information page might look in an implementation of Oracle iStore.

**Figure D–3 Enter Item Information Page Example**



**Enter Item Information** Cancel Apply

\* Indicates required fields

Chassis Style  Go

Chassis Color  Go

Mousepad Style

Mouse Alignment

\* Operating System  Go

Select Operating System and click 'Go' to show relevant fields.

7. The user selects Apply to save the data. The Your Shopping Cart, Item Information page is displayed. The items which have information populated display an active Item Information icon.
8. To return to the Your Shopping Cart, Items page, the user selects the Items link.

### D.2.2.3 Flow for Editing or Replacing Information from Your Shopping Cart Page

**Prerequisite:** A user has already created a shopping cart and has added DFF information for an item at item or cart level.

1. A user activates a shopping cart to retrieve the Your Shopping Cart page.
2. The user selects the Additional Information link in the Your Shopping Cart page.

3. To replace cart-level information, the user selects Cart Level from the View LOV and presses Go. To replace item-level information, the user selects Item Level from the View LOV and presses Go.
4. In a cart-level scenario, previously saved database information is displayed, and the user can edit the fields, pressing Apply to save his changes.
5. In an item-level scenario, for one or several items, the user can enter new information or clear existing information from the Item Information page. He also can edit information for individual items one-at-a-time. For an example of this page, see [Figure D-2, "Item Information Page Example"](#).
  - a. To edit or enter new information for a single item, the user selects active icon in the Item Information column. This retrieves the existing information, which can be edited or replaced.
  - b. To edit or enter information for several items at the same time, the user selects the checkboxes for the appropriate items and presses the Assign Information button. This retrieves the Enter Item Information page. For an example of this page, see [Figure D-3, "Enter Item Information Page Example"](#).

Note that this action (after the user saves the new data) will overwrite any existing information for all of the items selected.
  - c. To clear information for several items at the same time, the user selects the checkboxes for the appropriate items and press the Clear Information button.
6. The user selects Apply to save the data. The Your Shopping Cart, Additional Information page is displayed. The items which have information populated display an active Item Information icon.
7. To return to the Your Shopping Cart, Items page, the user selects the Items link.

#### **D.2.2.4 Flow for Entering Cart-Level Information from Payment and Billing Information Page**

1. A user visits a site and adds one or more items to the shopping cart.
2. The user selects Checkout and proceeds to the Payment and Billing Information page. This page shows Payment and Billing Information page DFF fields.
3. If the user had previously entered cart-level information through the Your Shopping Cart Additional Information page, it will display in this page, and the user can edit the information. If no previous cart-level information had been entered, the user enters relevant data in the DFF fields. Before being allowed to



continue, the user will be required to have appropriate information in fields that the merchant has marked as required in the Oracle Forms setup screens. These fields will display an asterisk (\*) next to them.

4. The user selects Continue to save the data and proceed with checkout.
5. To replace the information, the user can return to the Your Shopping Cart page and re-enter the information in the cart-level information flow (see [Section D.2.2.3, "Flow for Editing or Replacing Information from Your Shopping Cart Page"](#)).

### D.2.3 Behavior and Guidelines for DFFs

The following points describe Oracle iStore guidelines and behavior for DFF implementations.

#### Shopping Cart and Payment Pages DFFs:

1. In the shopping cart and payment pages, Oracle iStore has implemented Oracle Order Capture's Header: Additional Information DFF at the cart-level. The DFF segment values are stored in the ASO\_QUOTE\_HEADERS\_ALL table. Similarly, in the shopping cart page, Oracle iStore has implemented Oracle Order Capture's Lines: Additional Information DFF at the cart line-level. These DFF segment values are stored in ASO\_QUOTE\_LINES\_ALL table.
2. Oracle iStore provides the flexibility to implement DFF either at the cart-level or cart item-level, or both. In addition, site DFF implementation can be further controlled at the site and specialty store language levels.
3. Oracle iStore supports both global and context flexfield segments at the cart and item levels in the shopping cart. However, it does not provide any API-level validation to enforce mandatory segments, for either of these levels, during order placement. However, API-level validation can be indirectly enforced by setting up mandatory DFF segments in Oracle Order Management's DFF. If the cart-level Order Capture flexfield in the Payment page has been implemented for a site, then mandatory segments are enforced for the cart-level during checkout. Further, in this case, mandatory validation are enforced for both global and context field segments.
4. If cart-level and item-level flexfields have been implemented in Oracle Order Capture, and if the values entered by the end-user need to be available on the order after the cart is converted to an order, then the implementer must set up the Oracle Order Management flexfields at the order header-level and line-level -- these must exactly match the Oracle Order Capture flexfields. The corresponding Oracle Order Management flexfields are: Additional Header

Information (OE\_ORDER\_HEADERS\_ALL table) and Additional Line Attribute Information (OE\_ORDER\_LINES\_ALL table).

- **Caution:** DFF values are always passed to Oracle Order Management DFF segments. Hence, if the Order Capture DFFs are not identical to the Order Management DFF setups, and if the same database column is used for a different usage, then the data will be visually misleading. Further, if Order Management DFF segments have validations set up, then the Order placement through Oracle iStore may fail.
5. Any default values defined for flexfield segments will be shown in Oracle iStore, provided the user had not previously entered values for any of the flexfield segments. Also, Oracle iStore supports default value setup for the DFF Context field, in which case, the context segments for this context are automatically rendered.
  6. Oracle iStore does not support "reference field" setup for a DFF context field.
  7. Cart-level or item-level DFF information is not carried to a shopping list if the cart is saved as a list.
  8. Oracle iStore automatically saves cart- and item-level DFF information whenever a user saves or shares a shopping cart/quote.
  9. The shopping cart is re-priced when cart or item level DFF information is saved.
  10. For cart-level or item-level DFFs, if mandatory global/context segments have been set up, these mandatory segment validations are not enforced when the user selects Express Checkout in the Shopping Cart page.
  11. In some cases, item-level DFF information may not be captured during Express Checkout. For example: Assume DFF setup is done for both the Order Capture and Order Management DFFs for item level, with some of the segments as mandatory, and the user did not enter DFF information at item level. In this case, for normal checkout, Order Management would capture it while placing the order. However, if the items are checked out through Express Checkout from the catalog or shopping cart pages, there is no way to capture the required DFF information at item level.
  12. For configured items, DFF information can only be entered for the parent item. Similarly, for serviceable items with attached services, users can only enter DFF information for the serviceable item, but not for any related services.
  13. Only Independent, Table, and Dependent valuesets can be used with Oracle iStore.

14. For carts/quotes shared with Read-Only or Viewer access, the user cannot view the DFF information at the cart and item levels, as he cannot activate the cart.
15. If a customer has ordered multiple quantities of a single item, the items can be split to specify different shipping information for each duplicate item. In such a case, the item level DFF information for the original item is populated in each duplicate item.
16. If IBE: Merge Shopping Cart Lines is set to Yes, and if the same item is added more than once, when the item in the cart already has DFF information entered, then the DFF values already entered on the existing item in the cart are preserved.
17. No DFF information displays in order tracker.
18. If the profile, IBE: Additional Shopping Cart Information, is set to No, or if one of the following two templates is not mapped, then the Additional Information menu will not be available from the Your Shopping Cart page. The templates are STORE\_CART\_ADDINFO\_HEADER and STORE\_CART\_ADDINFO\_LINE. See [Section D.2.4, "Implementing DFFs in Oracle iStore"](#), for more information.

#### **Product Detail Page DFFs:**

1. For the product detail DFFs, Oracle iStore supports DFF segments defined on the Inventory Item table.
2. Only global flexfield segments are supported.
3. Out-of-box, the seeded product templates, Product Detail without Image, Product Detail with Image, and Product Detail with Services show product detail DFFs. See [Section 8.7.0.6, "Product Detail without Image"](#), [Section 8.7.0.5, "Product Detail with Image"](#), and [Section 8.7.0.7, "Product Detail with Services"](#), for details about these templates.

## **D.2.4 Implementing DFFs in Oracle iStore**

The sections that follow discuss how to implement DFFs for the Oracle iStore Customer UI. Topics include:

- [Section D.2.4.1, "Oracle Forms DFF Setups"](#)
- [Section D.2.4.2, "Setting up DFFs for Your Shopping Cart Page"](#)
- [Section D.2.4.3, "Setting up DFFs for Payment and Billing Information Page"](#)
- [Section D.2.4.5, "Setting up DFFs for Product Detail Pages"](#)

### D.2.4.1 Oracle Forms DFF Setups

No matter which portion of the Customer UI you plan to use DFFs for, you must first create the DFF segments and associated values using Oracle Forms' Descriptive Flexfields forms. Following are high-level steps to help you accomplish the implementation. For complete information, see the *Oracle Applications Flexfields Guide*.

**Important:** Be sure to review the guidelines in [Section D.2.3, "Behavior and Guidelines for DFFs"](#).

#### Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Choose Flexfield > Descriptive > Segments to open the Descriptive Flexfields Segments window.
3. Choose View > Find.
4. If setting up shopping cart or payment page DFFs, query for the flexfield with:
  - Application --- Oracle Order Capture
  - Title --- Header: Additional Information or Line: Additional Information, depending upon whether you are implementing cart or item level DFFs
5. If setting up product detail page DFFs, query for the flexfield with:
  - Application --- Oracle Inventory
  - Title --- Items
6. Uncheck the Freeze Flexfield Definition checkbox to allow for changes to the flexfield definition.
7. Set up flexfield segments: Select Segments and then map each segment you wish to use to a column, specified by the names ATTRIBUTE1 through ATTRIBUTE15. This column data (attributes 1-15) corresponds to columns with the same name in the ASO\_QUOTE\_HEADERS\_ALL and ASO\_QUOTE\_LINES\_ALL tables.

**Example:** Map "Sales Rep Email" to "ATTRIBUTE1."
8. Once all the changes for DFF are done, check the Freeze Flexfield Definition checkbox to freeze the changes, and select the Save icon. This compiles the flexfield definition in the database.

9. After you have set up the DFFs in Oracle Forms, perform the required Oracle iStore-specific steps, depending upon the type of DFF you are implementing:
  - [Section D.2.4.2, "Setting up DFFs for Your Shopping Cart Page"](#)
  - [Section D.2.4.3, "Setting up DFFs for Payment and Billing Information Page"](#)
  - [Section D.2.4.4, "Disabling Payment and Billing Information Page DFFs"](#)
  - [Section D.2.4.5, "Setting up DFFs for Product Detail Pages"](#)

### D.2.4.2 Setting up DFFs for Your Shopping Cart Page

The Additional Information page -- accessible as a hyperlink from the Your Shopping Cart page -- is used to capture item- and cart-level DFF information.

Use the following steps to set up Your Shopping Cart page DFFs, after you have performed the required setups in Oracle Forms DFF windows:

#### Steps

1. Set the profile option, IBE: Additional Shopping Cart Information, to Yes. See [Section A.7.0.22, "IBE: Additional Shopping Cart Information"](#), for more information on the profile option.
2. A site administrator has the flexibility to implement DFFs at cart-level, item-level or both, for each site. For this, two different templates are provided which you can map to display a specific JSP, according to the following instructions:
  - **Cart-Level DFF only** --- Map STORE\_CART\_ADDINFO\_HEADER to the ibeCScdHdrAdditionalInfo.jsp.
  - **Item-Level DFF only** --- Map STORE\_CART\_ADDINFO\_LINE to the ibeCScdLineAdditionalInfo.jsp.
  - **Both Cart- and Item-Level DFF** --- Map both templates to the JSPs.

For JSP mapping instructions, see [Section 8.11, "Mapping Source Files to Display Templates"](#). Remember, with Oracle iStore's template mapping functionality, you can map different JSPs to different site-language combinations.

**Important:** If the profile option, IBE: Additional Shopping Cart Information, is set to Yes, but the template mapping has not been set up, the Additional Information link will not display in the Your Shopping Cart page.

### D.2.4.3 Setting up DFFs for Payment and Billing Information Page

Store merchants can use the Additional Information area of the Payment and Billing Information page to capture cart-level DFF information. Note the following:

- If a user enters cart-level DFF information in the shopping cart section and then proceeds to check out the cart, the same DFF information will be automatically populated in the Additional Information section of the Payment page.
- Note that this implementation step only enables the Additional Information section DFFs in the Payment and Billing Information page, not the Additional Information link in the shopping cart. You must perform the setups listed in [Section D.2.4.2, "Setting up DFFs for Your Shopping Cart Page"](#), to enable the Your Shopping Cart page DFFs.

Use the following steps to set up Payment and Billing Information page DFFs, after you have performed the required setups in Oracle Forms DFF windows:

#### Steps

1. The Payment page flexfields are enabled when the following template is mapped to the following JSP (out-of-the-box, this template is already mapped to the JSP):
  - **STORE\_CHKOUT\_ADDINFO\_HEADER** -- Mapped to `ibeCCkdHdrBillPayFlex.jsp`
2. Customize the prompts for the flexfields, if desired.

The default prompt title is, "Additional Information." To change it, log in to Oracle Forms and modify the message `IBE_PRMT_ORD_FLEX_TITLE` in the `FND_NEW_MESSAGES` table.

The default additional instruction is, "Please fill in the following fields." To change it, log in to Oracle Forms and modify the message `IBE_PRMT_ORD_FLEX_DESCR` in the `FND_NEW_MESSAGES` table. See [Section 15.6, "Modifying Oracle Application Object Library Lookups"](#), for instructions.

### D.2.4.4 Disabling Payment and Billing Information Page DFFs

In order to disable the cart-level DFF display on the Payment and Billing Information page, map an empty JSP (an empty one that you create) to the template, `STORE_CHKOUT_ADDINFO_HEADER`.

**Note:** Since Template Manager will not allow you to map another All-All (site-language) mapping for this template, you will need to map the blank JSP for

each site-language combination for which you wish to disable the Payment and Billing page's DFF display.

#### D.2.4.5 Setting up DFFs for Product Detail Pages

- Out-of-box, Oracle iStore allows you to use DFF capability in three of the seeded product detail Display Templates -- Product Detail without Image, Product Detail with Image, and Product Detail with Services. See [Section 8.7.0.6, "Product Detail without Image"](#), [Section 8.7.0.5, "Product Detail with Image"](#), and [Section 8.7.0.7, "Product Detail with Services"](#), for details about these templates.
- If a DFF value is defined for an item, templates mapped at the product level display the prompt and the value of DFF global segments.

#### Steps

1. To set up flexfield segments and values for products and their detail pages, log into Oracle Forms with Inventory responsibility.
2. Navigate to the Inventory Item window and find the item for which flexfield values will be entered. Use the Inventory Organization that is set in the profile option, IBE: Item Validation Organization.
3. Click on the rectangle enclosed within brackets next to the Description field in the Inventory Item window. A window opens with the flexfield segments set up in the previous steps.
4. Enter values for the flexfield segments you want to display on the item detail page.
5. Reboot the Apache server to clear the cache after entering the new data.
6. Add the product(s) to a section, and map one of the product detail templates listed above at the product level. For steps, see [Section 8.9.7, "Setting Display Templates for Products"](#).
7. To test, in the Customer UI, navigate to the product(s) detail page. The flexfield segment prompts and values should appear on the item detail page.

### D.2.5 Sample Setup Displaying Different DFF Levels per Site

As discussed elsewhere in this section, out-of-box, Oracle iStore ships two templates for DFF implementation at the cart- and item-level. By default, these templates are not enabled; see [Section D.2.4, "Implementing DFFs in Oracle iStore"](#), for implementation information about these templates and DFF display. The following

presents a scenario for enabling DFFs at different levels for three different sites. This is accomplished by setting up unique template-JSP mappings for each site.

For steps to map JSPs to Display Templates at the site level, see [Section 8.11, "Mapping Source Files to Display Templates"](#).

### 1. Scenario 1: Implement only cart-level DFFs in Site 1

For Site 1, map only STORE\_CART\_ADDINFO\_HEADER to ibeCScdHdrAdditionalInfo.jsp.

Thus, when the user selects the Additional Information link, cart-level DFFs display.

### 2. Scenario 2: Implement only item-level DFFs in Site 2

For Site 2, map only STORE\_CART\_ADDINFO\_LINE to ibeCScdLineAdditionalInfo.jsp.

Thus, when the user selects the Additional Information link, item-level DFFs display.

### 3. Scenario 3: Implement both cart- and item-level DFFs in Site 3

For Site 3, map both the templates to the respective JSPs. Thus, when the user selects the Additional Information link, cart-level DFF information displays, and an LOV allows the user to select either cart or item information.

**Note:** Remember, along with these templates, the profile option, IBE: Use Additional Information, should be set to Yes.

## D.3 Display Template Mappings Import and Export

Oracle iStore's Display Template Mappings Import/Export functionality allows you to export or import template mappings using Extensible Markup Language (XML) files. The functionality is implemented as two concurrent programs:

- iStore Template Mapping Import Concurrent Program
- iStore Template Mapping Export Concurrent Program

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**Note:** You can find an introduction to Display Templates in [Section 8.2, "Display Templates Overview"](#).

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This section contains the following topics:



- [Section D.3.1, "Template Mappings Import/Export Features and Benefits"](#)
- [Section D.3.2, "Running the Template Mapping Export Concurrent Program"](#)
- [Section D.3.3, "Running the Template Mapping Import Concurrent Program"](#)
- [Section D.3.4, "Setting up Debug for Template Mappings Concurrent Programs"](#)
- [Section D.3.5, "Copying Template Mappings Between Sites in the Same Instance"](#)
- [Section D.3.6, "Copying Template Mappings Between Instances"](#)

### D.3.1 Template Mappings Import/Export Features and Benefits

Utilizing the template mappings import/export functionality can provide numerous benefits in your maintenance of Oracle iStore templates. Using the concurrent programs and XML files you can export, update, and import template:

- Names
- *Applicable To* categories
- Keywords
- Descriptions
- Source file site/language mappings
- Mappings between sites

In summary, this functionality's benefits and features include:

- By altering the mappings in the XML file and then importing the changes, you can update template attributes, such as name, *Applicable To* category, and source file mappings.
- You can transfer template mappings between sites in the same instance.
- You can transfer template mappings between instances -- for example, between a test and production instance.
- Concurrent programs allow you to schedule background jobs to run automatically, thus minimizing the maintenance time impact.
- Template creation is supported during the import process. The import program will create a new template if the programmatic access name of the template does not exist in the target instance.

- When you run the export concurrent program, you have the ability to select a specific site(s) whose template mappings you wish to export.
- The functionality features the ability to export only templates matching a specific Applicable To category.
- You can select to export all templates mappings, only seeded template mappings, or only custom template mappings.
- The concurrent program log files allow you to view the results of the program execution.
- Debug functionality allows troubleshooting of the concurrent program process. See [Section D.3.4, "Setting up Debug for Template Mappings Concurrent Programs"](#), for details.

Note that the comma separated values (.csv) format is not supported for template mappings import/export.

## D.3.2 Running the Template Mapping Export Concurrent Program

To export template mappings to an XML file, you use the iStore Template Mapping Export concurrent program. For general steps on how to run concurrent programs, see [Section B.12, "Running Concurrent Programs"](#). To set up debug functionality for the program, see [Section D.3.4, "Setting up Debug for Template Mappings Concurrent Programs"](#).

The following are the parameters you can choose from when running the export concurrent program:

- **Site Code** -- The Site Code LOV contains a list of all existing site codes across all instances. To export template mappings from a specific site, select a site from the Site Code LOV. To export from all sites, leave the LOV blank. You can only select one site at a time the LOV.
  - Note that site code is different from site ID. Site code is an administrator-definable field (accessible from the Site Details page) which will be the same across instances for the same sites, while site ID is a system generated ID which can be different across instances for the same sites.
- **Template type** -- The Template type LOV allows you to select either Seeded or Custom (non-seeded) template mappings. To export all types, leave the LOV blank.
- **Template category** -- The Template category LOV allows you to filter the output by template Applicable To category. To export all categories, leave the LOV

blank. For a discussion of the Applicable To categories, see [Section E.1, "Template Categories"](#).

Running the concurrent program will create an XML file. The name of the export file is system-generated. See [Section D.3.2.1, "Template Mapping Export Program Log File"](#), for more details.

### **D.3.2.1 Template Mapping Export Program Log File**

After running the concurrent program:

1. View log file details of the export. To view the output, select View Output button on the View Request screen.
2. To save the output file, select File > Save As and save the output as an XML file from the browser. Note that you must set the profile option, Viewer Text, to be able to save the output from the browser.
3. Edit the XML file as desired. For example, change site codes, file names, or template categories. Save and upload the file to the server on which your concurrent manager is running. Ensure that the user running the concurrent manager program has read-write permission on the server.

The log file contains such information as:

- Date the program was executed
- Parameters involved in the execution:
  - Site code (if applicable)
  - Template type (if applicable)
  - Template category (if applicable)
- Result:
  - Number of templates successfully exported
  - Number of errors
  - Template name of the first template that has an error

The following graphic, [Figure D-4, "Template Mappings Export File Example"](#), shows an example of an XML file exported by the iStore Template Mapping Export Concurrent Program.

**Figure D-4 Template Mappings Export File Example**

```

<?xml version="1.0" encoding="UTF-8" ?>
- <Template_Map>
 - <Template programmatic_access_name="demoTemplate">
 <Row_Reference>1</Row_Reference>
 <Name language="en">demoTemplate</Name>
 <Description language="en">demoTemplate</Description>
 <Seed_Flag>No</Seed_Flag>
 <Applicable_To>PRODUCT_SECTION</Applicable_To>
 <Keywords>demoTemplate</Keywords>
 - <Map>
 <Seed_Map>No</Seed_Map>
 <Site_Code default="no">demoSite1</Site_Code>
 <Site_Name>demoSite1</Site_Name>
 <Language_Code default="no">US</Language_Code>
 <File_Name>demoTemplateFile</File_Name>
 </Map>
</Template>
</Template_Map>

```

### D.3.3 Running the Template Mapping Import Concurrent Program

To import template mappings from an XML file, you use the iStore Template Mapping Import concurrent program. For general steps on how to run concurrent programs, see [Section B.12, "Running Concurrent Programs"](#). To set up debug functionality for the program, see [Section D.3.4, "Setting up Debug for Template Mappings Concurrent Programs"](#).

#### Prerequisites:

1. In order to import template mappings, you must first upload the appropriate XML file to a directory on the application web server. For example, `template1.xml` is put in `/nfs/group/crmeco/html` through ftp on `machine2`.
2. Ensure that the user running the concurrent manager program has read-write permission on the server.
3. AutoConfig must be enabled in order for the template import feature to fully work. If AutoConfig is not enabled for the instance, upload the file to a directory of the machine that concurrent manager is running on. Here is how to find the machine that concurrent manager is running on:
  - a. Login to Oracle Forms using System Administrator responsibility.

- b. Navigate to Concurrent > Manager > Administer. In the Administer Concurrent Managers window, under the Standard Manager entry, the machine name will appear in the Node (standard manager) column. This will be the machine the concurrent manager is running on. For more information, see *Oracle Applications System Administrator's Guide*.
4. Consider setting of the *Save after every successful template import* input parameter --- If the autosave input parameter is turned on, a commit is called for the successful save of every individual template and its mappings. If autosave is turned off, the data is committed to the database only once for all of the counts of the templates and their mappings. If the rollback/commit segment is less, this may cause some issues in committing the data. In such a case, you should turn on the autosave and re-run the Template Import program.

The following are the parameters involved when running the import concurrent program:

**Note:** Seeded template mappings are ignored during the import process.

- **Source file name** -- You must enter the import concurrent program parameter source file name including machine name and full path of the file. For example, you would enter `machine2:/nfs/group/crmeco/html/template1.xml`.

**Note:** The file name is case-sensitive.

- **Save after every successful template import** -- Select Yes to save after every successful template import. If you select No, then the system will save mappings all together at the completion of the import process.
- **Automatically stop the import if there are too many errors** -- You can use this parameter to stop the concurrent program execution if a certain number of errors occur during import. Select Yes to use the feature; select No to not use the feature.

If you select Yes, you must fill in a number in the next field, "Number of template errors to stop the import".

- **Number of template errors to stop the import** -- Enter the number of data errors after which to stop the import.

**Note:** For the purpose of this functionality, errors are categories as one of two types:

- **Fatal** errors: The source file is not found or file format is incorrect.
- **Data** errors: A template mapping definition is incorrect.

This field works only on data errors. The "Automatically stop the import if there are too many errors" field must be set to Yes for this field to be effective. The program will stop executing if a fatal error happens whether this field is set or not.

### D.3.3.1 Template Mapping Import Program Log File

You can use the log file of the concurrent program to view details of the import, including:

- Date the program was executed
- Parameters involved in the execution:
  - XML source filename
  - Save after every successful template import: <Yes/No>
  - Automatically stop the import if there are too many errors: <Yes/No>
  - Number of template errors to stop the import: <number>
- Result:
  - Number of templates successfully imported
  - Number of errors
  - Row number of first template that has an error

For steps detailing how to view log files, see [Section B.13, "Checking Concurrent Program Status"](#).

## D.3.4 Setting up Debug for Template Mappings Concurrent Programs

Oracle iStore allows troubleshooting of the import/export concurrent program process by turning on the concurrent program's "Turn on trace" parameter. You can enable this flag for both the template mappings import and export concurrent programs.

Use the following steps:

1. Log in to Oracle Forms using Application Developer responsibility.
2. Navigate to Concurrent > Program, and find either the iStore Template Mapping Import program or the iStore Template Mapping Export program.
3. Select the Parameters button.
4. Find the DEBUG\_FLAG parameter and select the Enabled checkbox.

5. Save the changes.
6. When you run either of the concurrent program for which you have enabled the debug flag, you will see the "Turn on trace" flag on the parameter screen. The debug information is included in the log file of the concurrent program. See [Section D.3.2.1, "Template Mapping Export Program Log File"](#), and [Section D.3.3.1, "Template Mapping Import Program Log File"](#), for more information.

### D.3.5 Copying Template Mappings Between Sites in the Same Instance

You can transfer existing template mappings from one site to another within the same instance by doing the following:

1. Run the export concurrent program with the desired parameters, selecting only one site in the export. For parameters, see [Section D.3.2, "Running the Template Mapping Export Concurrent Program"](#).
2. Modify the XML file's site parameter to reflect the Site Code of the site you wish to transfer the mappings to.
3. Run the import concurrent program, selecting the desired parameters. For parameters, see [Section D.3.3, "Running the Template Mapping Import Concurrent Program"](#).

### D.3.6 Copying Template Mappings Between Instances

You can transfer existing template mappings (for all sites/categories/types) from one instance (for example, instance A) to another (for example, instance C) by doing the following:

1. Run the export concurrent program from source instance, leaving Site Code, Template Type, and Template Category blank. For parameters details, see [Section D.3.2, "Running the Template Mapping Export Concurrent Program"](#).
2. Upload the export XML file to a directory accessible to the destination instance.
3. Run the import concurrent program from the destination instance, selecting the desired import parameters. Be sure to enter the complete path of the XML file in the Source File Name field. For parameters details, see [Section D.3.3, "Running the Template Mapping Import Concurrent Program"](#).

## D.4 Advanced Product Relationships Procedures

This section contains information on advanced tasks surrounding product relationships. General information on relationships can be found in [Section 8.12, "Using Product Relationships"](#).

Topics include:

- [Section D.4.1, "Building Relationships Using Other than the Related Type"](#)
- [Section D.4.2, "Seeded Relationship Types"](#)
- [Section D.4.3, "Creating New Relationship Types"](#)
- [Section D.4.4, "Creating Relationships Using SQL Rules"](#)

### D.4.1 Building Relationships Using Other than the Related Type

If you use any relationship type other than the seeded, supported relationship type **Related**, you must customize the Oracle iStore JSPs to retrieve the related items with the Java API:

```
oracle.apps.ibe.catalog.Item.getRelatedItems().
```

This method can retrieve related items of given an item ID and a relationship type. The method is also overloaded. See *Oracle iStore API Reference Guide* for documentation of this method.

If the relationship type is also seeded in Oracle Inventory, then `oracle.apps.ibe.catalog.Item.getRelatedItems()` retrieves related items defined in Oracle Inventory as well as in Oracle iStore.

- See *Oracle Inventory User's Guide* for details on how to set up and use Oracle Inventory.

### D.4.2 Seeded Relationship Types

Use the following Oracle iStore seeded relationship types build relationships:

#### 34.4.1.1 Seeded Relationship Types

Below are the Oracle iStore's seeded relationship types:

- **Collateral** --- Entity B is collateral (e.g., marketing brochures) that exists for entity A
- **Complimentary** --- Entity B is available free of charge with entity A



- **Conflict** --- Entity A is not usable together with a related entity B
- **Cross-Sell** --- Entity B can be offered and sold along with entity A
- **Impact** --- Entity A is usable together with related entity B, but only under certain conditions
- **Mandatory Charge**
- **Optional Charge**
- **Prerequisite** --- Customer must have entity B before purchasing entity A, or related product/event must be possessed/attended beforehand
- **Promotional Upgrade** --- Entity A ordered by customer is upgraded to entity B of equal or higher value, with no change in price.
- **Related** --- Entity B is related to entity A
- **Service** --- Entity B is a service item that can be added to cart for a serviceable entity A
- **Substitute** --- Entity B can be substituted for entity A
- **Superseded** --- Entity B supersedes entity A, which is no longer available
- **Up-Sell** --- A newer version, entity B, can be sold instead of entity A

### D.4.3 Creating New Relationship Types

Use this procedure to define new relationship types.

#### Steps

1. Log in to the Site Administration UI and select Catalog > Relationships. The Relationship page displays a summary of all relationships types in your organization's implementation.  
  
*Seeded* relationship types will have a Remove icon that is grayed out.  
*Non-seeded* relationship types will display a viable Remove icon next to them for removal of the relationship type.
2. Select Create Relationship. The Create Relationship page opens.
3. In the Name field, enter the relationship type name.
4. In the Description field, enter a description. This is an optional field.
5. In the Effective Date From field, select a start date for the relationship type.

6. Optionally, in the Effective Date To field, select an expiration date for the relationship type.
7. Select one of the following from the Rule Type LOV:
  - a. **Create Mapping Rules** to use Oracle iStore rule builder, and follow the steps in [Section 8.12.1, "Creating Relationships Using Mapping Rules"](#).
  - b. **Create a SQL Rule** to specify an SQL query. See [Section D.4.4, "Creating Relationships Using SQL Rules"](#), for instructions.
8. Select Apply. The relationship type has been created. The Relationship Detail page opens, where you can begin adding rules to the relationship type.

## D.4.4 Creating Relationships Using SQL Rules

The SQL method of creating relationship rules in Oracle iStore is used in place of the mapping rules by highly technical personnel with knowledge of SQL. Most site managers will use the mapping rules.

**Note:** You cannot use Relationship rules created using the Oracle iStore rule builder and the SQL rules together for the same relationship.

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**Caution:** If you set up an SQL rule with a relationship type, you cannot delete it.

---

---

If a relationship is driven from an SQL rule type, the SQL statement is executed at runtime to get the actual item-level relationships. The SQL query can have up to 10 bind variables (and unlike the mapping rules, SQL Rules are not pre-evaluated). These SQL queries are executed at runtime using the input parameters supplied from the JSP page.

### ***Example 34–1 SQL Relationship Rules Example:***

A customer is selling books on his web site and has set up the attribute1 in the DFF segment of mtl\_system\_items\_b as the author of the book. By defining an SQL type relationship he wants to retrieve all the books belonging to the same author. Here is his sample SQL rule:

```
SELECT msi2.inventory_item_id
FROM mtl_system_items_b msi1, mtl_system_items_b msi2
WHERE msi1.organization_id = msi2.organization_id
```

```
AND msi1.attribute1 = msi2.attribute1
AND msi1.inventory_item_id = :item_id
AND msi1.organization_id = :organization_id
```

During runtime, when the value for the bind variable(s) is passed in, the SQL type relationship will retrieve all the items (books) whose author is the same as the item (book) being displayed.

Use the following procedure to create relationships using either the seeded relationship types or types you have created.

### Prerequisites

- Required implementation tasks have been performed, as described in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).
- Products and related category structures must be set up in Oracle Inventory before they can be imported into Oracle iStore. See *Oracle Inventory User's Guide* for details.
- Products in Oracle Inventory must have the required flags set as described in [Section 7.3.3, "Required Inventory Flags for Oracle iStore Products"](#).

### Steps

1. Log in to the Site Administration UI and select Catalog > Relationships. The Relationship page displays a summary of all relationships types in your organization's implementation.  
  
*Seeded* relationship types will have a Remove icon that is grayed out. *Non-seeded* relationship types will display a viable Remove icon next to them for removal of the relationship type.
2. In the Search for Relationship by Name textbox, enter the relationship type name; select Go to launch the search. Or, scroll through the list of relationship types and find the relationship type.
3. Select the Update icon for the Related relationship type. The Relationship Details page appears.
4. Select Create a SQL Rule.

**Caution:** If you set up an SQL rule with a relationship type, you cannot delete it.

5. In the SQL Rule textbox, enter your SQL rule. For products in Oracle Inventory, retrieve the `inventory_item_id` column in the `MTL_SYSTEM_ITEMS` table.
6. Optionally, select Validate to validate the SQL statement before saving as a relationship rule.  
**Note:** This will validate the SQL syntax but not the SQL content.
7. Select Apply to save changes.

## D.5 Using Display Styles for Default Display

**Note:** It is recommended that you use Display Templates instead of Display Styles for displaying product information in your specialty sites. See [Section 8.2, "Display Templates Overview"](#).

You can choose to display products inside a section template based on the Oracle Inventory category to which the products belong. While none of the out-of-the-box Display Templates use display styles, you can create your own custom section Display Template to use the Display Styles functionality. The custom section Display Template can be created so that each product under the section can be displayed differently --- based on its inventory category --- using a Display Style.

The default category set specified by the profile option, IBE: Category Set, contains your sites' product inventory. You can map each category from Oracle Inventory to a Display Style to present content at the category level.

If there are no item-level mappings to Display Styles, Oracle iStore checks for the category-level settings and uses them to display the product.

In Oracle iStore, the display styles functionality allows you to specify a style by which categories of products will display. This allows category-level default display of products in your sites. You can select product categories from within the category set mapped to the IBE: Category Set profile option. Default product display is determined by the display style only when no product-level display parameters are set.

Each display style maps to an Oracle iStore template, which then calls the appropriate template source file (JSP) for the site and language mapping.

When you create and save new display styles in the Display Styles tab, you choose site-level default Display Templates for them. These display styles then appear in the Products and Categories pages. In Products and Categories pages, you can choose a template name to correspond with each display style for a product or a category.

You also can create new Display Styles and register them in the Display Styles pages (in the Advanced tab). See: [Section D.5.0.4, "Creating Custom Display Styles"](#).

### D.5.0.1 Enabling Display Styles

You must set the following profile option in order to enable the **Display Styles** pages in the Site Administration UI **Advanced** tab, and to be able to select display styles as defaults for product display in the **Catalog > Products** and the **Catalog > Sections** pages.

- **IBE: Enable Display Style** --- This profile option specifies whether display styles functionality is apparent in the Oracle iStore Site Administration UI. Set it to Yes at the iStore application level to enable the appearance of certain functionality which is described below. By default, this profile option is set to No.

When the profile option is set to Yes, the following occurs in the Site Administration UI:

1. In the Advanced tab, Template Manager subtab, the Display Styles hyperlink appears. You select the Display Styles hyperlink to access the Display Styles page.  
  
The Display Styles page lists all display styles in your implementation. It also allows access to other pages where you can add and update display styles.
2. In the Catalog pages, within the Products subtab, Use Display Styles is selectable as a display option for products in the Select a Display Template LOV.
3. In the Catalog pages, within the Sections subtab, Use Display Styles is selectable as a display option for sections in the Select a Display Template LOV.

### D.5.0.2 How Customer UI Pages Display Products with Display Style Mappings

When a Customer UI page displays a product using a particular display style, Oracle iStore selects the appropriate template as follows:

1. If there is a product-specific template for the given display style, then the product-specific template is used.
2. If no mapping is specified at the product level, and there is a category-specific template, then the category-specific template is used.
3. If no template name is selected for a product or a category, then the display style's default site-level template is used on the web page.

**Note:** Product-level (item-level) configurations override category-level and site-level settings.

**D.5.0.3 Seeded Display Styles**

When Oracle iStore ships, five seeded display styles are already set up. In the Site Administration UI, select **Advanced > Template Manager > Display Styles** to view seeded display styles.

The table below, [Table D–1, "Seeded Display Styles and Default Display Template Mappings"](#), shows the seeded display styles and the Display Templates that they map to out-of-the-box.

**Table D–1 Seeded Display Styles and Default Display Template Mappings**

		Default Display Template Name and Prog. Access Name
Name	Programmatic Access Name	
Featured Product	STORE_FEATURED_PRODUCT	Catalog - Featured Product STORE_CTLG_FEATURED_ITEM (ibecfitm.jsp)
Product Detail	STORE_PRODUCT_DETAIL	Product Detail STORE_CTLG_ITEM_DETAIL (ibecitmd.jsp)
Product Small Description	STORE_PRODUCT_SMALL_DESCR	Catalog - Product Small Description STORE_CTLG_LEAF_ITEM (ibeclitm.jsp)
Product Details	STORE_PRODUCT_DETAILS	Catalog - Product Details STORE_CTLG_ITEM_DETAILS (ibeCCtdItemDetail.jsp)
Product Description	STORE_PRODUCT_DESCR	Catalog - Product Description STORE_CTLG_LEAF_ITEM_INCL (ibeCCtdLeafItem.jsp)

**D.5.0.4 Creating Custom Display Styles**

Use the following procedure to create additional display styles beyond those provided out-of-the-box.

### Prerequisites

- Since each display style must be mapped to a template, for new display styles, you must first register the applicable templates in the Advanced > Template Manager pages. If the template information is unavailable, you may continue the setup and select a default template later. However, if a template association is requested for any product or category with that display style and it is not specified, Oracle iStore will use the default site-level template. To avoid the error, you can also use the seeded values for display styles, listed under Display Styles in the Advanced tab > Display Styles hyperlink.
- Enable Display Styles functionality by setting the profile option, IBE: Enable Display Style, to Yes at the iStore application level.

### Steps

1. Log into the Site Administration UI and select Advanced > Template Manager > Display Styles. The Display Styles page displays a list of existing display styles.  
  
Non-seeded display styles will have an active Remove icon, while seeded ones will have a grayed-out Remove icon.
2. Select Create Display Style. The Create Display Style page opens.
3. Enter the following information for the display style:
  - a. **Name** --- Enter a name for the display style. This will be the name used internally by your organization.
  - b. **Programmatic Access Name** --- Enter a unique alphanumeric programmatic access name for the display style. The iStore template associated with the display style use this programmatic access name to call the display style.
  - c. **Description** --- Enter a description for the display style if desired.
  - d. **Default Template** --- Use the flashlight icon to search for and select the default template to use with this display style.
4. Select Apply to save changes.

## D.5.1 Configuring Product Presentation at the Category Level

Every product in the product catalog is mapped to a category in Oracle Inventory. Using media, Display Templates, and display styles, you can configure category-level defaults for product display.

Use this procedure to modify defaults for categories. You can only specify defaults for categories belonging to the primary display category set (the value of the IBE: Category Set profile option).

### Prerequisites

- Required implementation tasks have been performed, as described in [Chapter 4, "Implementation Tasks for Oracle iStore"](#).
- Products have been implemented. **See:** [Chapter 7, "Implementing Products"](#).
- The profile option, **IBE: Display Style Enabled**, has been set to **Yes** at the iStore application level.

#### D.5.1.1 Steps to Map Category-Level Default Templates

1. Log into the Site Administration UI and select Advanced > Categories. The Categories page displays.
2. Search for categories by Category Code or Category Description. You can enter partial values in the search textbox, and Oracle iStore automatically appends a wildcard to the end.
3. Based on the search criteria, the search results display categories from within the category set specified in the default category set. See [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#), for more information. Select the radio button of the category you want to update and press Assign Templates.

The Category Details: Assign Display Templates page lists all seeded display styles and any mapped, category-level templates.

4. In the Category Details: Assign Display Templates page, to map a display style at the category-level to a new template, select the flashlight icon next to the appropriate display style.

The Search and Select: Template page appears. By default, this page will only Display Templates which are meant to be used to display products.

5. In the Search and Select: Template page, select the radio button of an appropriate template, and press the Select button to save changes.
6. The Category Details: Assign Display Templates page re-appears with the template column populated with the template you have chosen.
7. To save changes, press Apply.



In site pages related to this category that use a given display style, this template overrides the display style default template.

### D.5.1.2 Steps to Map Category-Level Default Media Objects

1. Log into the Site Administration UI and select Advanced > Categories. The Categories page displays.
2. Search for categories by Category Code or Category Description. You can enter partial values in the search textbox, and Oracle iStore automatically appends a wildcard to the end.
3. Based on the search criteria, the search results display categories from within the category set specified in the default category set. See [Section 7.3.2, "Inventory Categories and the iStore Product Catalog"](#), for more information. Select the radio button of the category you want to update. Select the Assign Content button.

The Category Details: Assign Default Content page lists all seeded content components and any mapped, category-level media objects.

4. To map content components at the category-level to a new media object, select the flashlight icon next to the appropriate content component. The Search and Select: Media Object page appears.
5. In the Search and Select: Media Object page, select the radio button of an appropriate media object, and press Select to save changes.
6. The Category Details: Assign Default Content page re-appears with the media object linked to the content component.
7. Press Apply to save changes. The media object will be used for default display of products within the Inventory category you mapped it to.

## D.6 Deep Linking Support

When advertising your specialty sites and products in e-mails and other web sites, you can provide deep links from the advertisement to your sites. This section discusses the deep link functionality in the following topics:

- [Section D.6.1, "Overview of Deep Linking"](#)
- [Section D.6.2, "Implementing Deep Links"](#)
- [Section D.6.3, "Go and Destination Parameters"](#)
- [Section D.6.4, "Globalization Parameters"](#)

- [Section D.6.5, "Tracking Parameters"](#)

## D.6.1 Overview of Deep Linking

When users select a deep link, they are automatically directed to the appropriate target based on the parameters in the URL. Possible target pages include, but are not limited to, the following:

- A site home page
- A section page
- An item detail page
- A shopping cart
- Addition of items to a shopping cart
- A published quote
- The login and registration pages

## D.6.2 Implementing Deep Links

A deep link's URL points to the entry page, `ibeCZzpEntry.jsp`. To the URL, you append specific parameters that are either required or optional, depending on the deep link target and your Oracle iStore setups. The parameters enable redirection of the user to the intended target page. See the following sections below for more information:

- [Section D.6.2.1, "Deep Link Targets"](#)
- [Section D.6.2.2, "Deep Link Procedure"](#)
- [Section D.6.2.3, "Deep Link Example"](#)

### D.6.2.1 Deep Link Targets

The following table, [Table D–2, "Deep Link Targets"](#), summarizes the targets specified in the URL parameters.

**Table D–2    Deep Link Targets**

Parameter Data	Description
Minisite ID or access name	The target specialty site
Responsibility ID	The responsibility that should be assigned to the user

**Table D–2 Deep Link Targets (Cont.)**

Parameter Data	Description
Language	The display language
Section ID	A section within a specialty site
Item ID	An item, to display its detail page or add it to a shopping cart
Shopping cart	A shopping cart with or without items
Quote ID	A published quote's number
Contract number	A published quote's contract number
UOM	The UOM of an item being added to a shopping cart
Quantity	The item quantity being added to a shopping cart
User name	The user name for login
Password	The password for login
Affiliate	The affiliate that posted the deep link
Source URL	The URL where the deep link was posted
Source e-mail	The e-mail address to which the deep link was sent
Party	The party ID of the registered user who received the deep link
Marketing campaign	The marketing campaign using the deep link
Marketing source code	The marketing source code used in the deep link
Promotion code	Promotion code used in the deep link
Merchant-definable parameters	Ten parameters that you can define to capture other information in the deep link URL

### D.6.2.2 Deep Link Procedure

Use the following procedure to create a deep link.

#### Steps

1. Create a deep link URL that uses the following syntax:

```
http://<domain name>/<directory path>/ibeCZzpEntry.jsp?<go
parameter>&<destination parameters>&<globalization
parameters>&<tracking parameters>.
```

For lists of supported parameter values, see:

- [Section D.6.3, "Go and Destination Parameters"](#)
- [Section D.6.4, "Globalization Parameters"](#)
- [Section D.6.5, "Tracking Parameters"](#)

For a sample deep link URL, see [Section D.6.2.3, "Deep Link Example"](#).

2. Include the deep link in an e-mail, web site advertisement, or any other appropriate location.

**D.6.2.3 Deep Link Example**

The following deep link adds an item to the user’s active shopping cart:

```
https://oraclestore.oracle.com/OA_HTML/ibeCZzpEntry.jsp?go=buy&item=293947&qty=1
```

This deep link redirects the user to the URL:

```
https://oraclestore.oracle.com/OA_HTML/ibeCCtpBuyRoute.jsp?item=293947&qty=1
```

This page is the user’s active shopping cart, with one unit of the Oracle Database Enterprise Edition (item ID 293947) added. The active shopping cart also holds any items that the user had previously added.

**D.6.3 Go and Destination Parameters**

Destination parameters specify the link’s destination as commanded by the go parameter. The following table, [Table D–3, "Go and Destination Parameters"](#), lists the supported values. The parameters are required unless otherwise stated.

**Table D–3    Go and Destination Parameters**

Destination	Go Parameters	Destination Parameters
Specialty site home page <sup>1</sup>	go=catalog	None
Section page	go=section	section=<section ID>
Item detail page	go=item	item=<item ID>&section=<section ID> The section parameter is optional.
Shopping cart	go=cart	None

**Table D–3 Go and Destination Parameters (Cont.)**

Destination	Go Parameters	Destination Parameters
Quote	go=quote	quote=<quote ID>&contract=<contract number> The contract parameter is optional.
Add one item to a shopping cart	go=buy	item=<item ID>&qty=<quantity>&uom= <UOM>&promotion=<promotion code>&msource=<marketing source code ID>&ref=<referrer URL> The promotion, msource, and ref parameters are optional. The ref parameter specifies the JSP to redirect the user to after adding the item to the cart.
Add multiple items to a shopping cart <sup>2</sup>	go=buy	item_0=<item ID>&qty_0=<quantity> &uom_0=<UOM>&promotion_0=<promotion code>&msource_0=<marketing source code ID>&item_1=<item ID>&qty_1= <quantity>&uom_1=<UOM>&promotion_1=<promotion code>&msource_1= <marketing source code ID> ... &num=<number of line items>&ref= <referrer URL> Use the sequential numbering convention in this example, beginning with item_0. The promotion, msource, and ref parameters are optional. The ref parameter specifies the JSP to redirect the user to after adding the items to the cart.
Autologin user	go=login	username=<username>&password=<password>&ref=<referrer> The ref parameter is optional. It specifies the JSP to redirect the user to after login. If the parameter is not set, the user is redirected to the specialty site home page.
Sign in or register user	go=signin	ref=<referrer> The ref parameter is optional. It specifies the JSP to redirect the user to after login. If the parameter is not set, the user is redirected to the specialty site home page.
Other pages	go=<JSP name>	None

<sup>1</sup> The home page of the specialty site in the `site` parameter. If the `site` parameter is not specified, the user is directed to the default specialty site's home page. See [Table D–4, "Parameters for Globalization Data"](#) for details about the `site` parameter.

<sup>2</sup> When creating a deep link that adds multiple items to a shopping cart, you cannot include model bundles or configurable products.

## D.6.4 Globalization Parameters

Globalization parameters specify specialty site, responsibility, and language information. Globalization parameters are optional unless otherwise stated.

The following table, [Table D–4, "Parameters for Globalization Data"](#), lists the globalization parameters and their supported values.

**Table D–4   Parameters for Globalization Data**

Globalization Data	Globalization Parameters
Specialty Site	site=<minisite ID or access name>  The <code>site</code> parameter is mandatory if the profile option IBE: Default Specialty Site is not defined.
Responsibility	respid=<responsibility ID>
Display language	language=<language code>  The deep link defaults to the specialty site's default language if the language parameter is not set.

D.6.5 Tracking Parameters

Tracking parameters specify link tracking information. Tracking parameters are optional.

The following table, [Table D–5, "Parameters for Tracking Data"](#), lists the tracking parameters and their supported values.

**Table D–5   Parameters for Tracking Data**

Tracking Data	Tracking Parameters
The affiliate that posted the deep link	affiliate=<affiliate code>
Marketing campaign	campaign=<campaign code>
Marketing source code	msource=<marketing source code ID>
The party ID of the registered user to whom the deep link was e-mailed	party=<party ID>
The e-mail address to which the deep link was sent	src_email=<source e-mail>
The URL where the deep link was posted	src_url=<source URL>
Merchant-definable parameters	param0=<parameter> ... param9=<parameter> You can define the ten parameters param0 through param9 to meet other tracking needs.

## D.7 Customizing Templates

Oracle iStore Customer UI page designs use common components, such as tabs, bins, and common section pages. Each component is based on a template, and the templates are combined to create a site web page. The templates control the appearance of the site through the use of JavaServer Pages (JSP), which combine Application Programming Interfaces (API) to call dynamic data and HTML to present static data. The routing and processing pages determine what to do with the templates.

Oracle iStore comes packaged with a complete set of JSP templates needed to run the site. If you want to expand the functionality of the site web pages or customize the pre-packaged templates, then you need to identify the flow of the application and the JSP templates needed to implement the flow. To help determine page flows, see [Appendix F, "Customer UI Process Flows"](#).

- For an introduction to Display Templates, see [Section 8.2, "Display Templates Overview"](#).

### D.7.1 How Customer UI Pages Call Templates

Your Customer UI page can call for templates to display in two ways:

- Directly by using the template logical (programmatic access) name
- Indirectly by using the display style

#### D.7.1.1 Templates Called by Logical Name

You assign a template name and a programmatic access name to a template using the Advanced > Template Manager pages. You then assign one or more physical JSP files to combinations of sites and languages. At runtime, Oracle iStore looks at the customer's language and displays the files that are assigned to the customer's language for the site the customer is in. If no file is specified for the language, then the default source file for that site and all languages is displayed. If no file is specified for the site and all languages, then the default file for all sites and all languages is displayed.

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**Note:** You also can use Oracle iStore's Template Mappings Import/Export functionality to preserve existing template mappings and avoid overwriting your customized template mappings. See [Section D.3, "Display Template Mappings Import and Export"](#), for details.

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### D.7.1.2 Templates Called Indirectly

You can indicate that the template associated with a given display style will be used when displaying a product. See [Section D.5, "Using Display Styles for Default Display"](#), for information on creating your own display styles.

**Note:** Although using the display styles functionality provides additional flexibility, none of the out-of-the-box templates use the display styles concept.

Oracle iStore uses the following process to determine which template to use when displaying a product according to a given display style.

#### ***Example D–1 Product Template Display***

1. For a given display style, Oracle iStore uses the template that you associated with the product.
2. If no template is associated at the product level, Oracle iStore retrieves the template associated with the product's primary display category.
3. If no template is associated with the product or category, Oracle iStore retrieves the default template for the display style.

## D.7.2 Template Customization Tasks

To customize templates for your site, perform the following tasks after planning your web page designs:

1. Gain an understanding of the recommended and/or mandatory page flows through your specialty sites. See [Appendix F, "Customer UI Process Flows"](#), for more information.
2. Create template source files (JSPs) for pages or for blocks within pages using Oracle JDeveloper. If you are implementing multiple languages, create source files in each of the languages which you plan to support. Or, copy the seeded JSPs (save with a new name) and apply your modifications; then, map the new



JSP to the page flow through Template Manager. See [Section D.7.3, "Creating Template Source Files"](#) and [Section D.7.4, "JSP Naming Conventions"](#), for more information.

3. Choose Oracle iStore template names. See [Section D.7.5, "Creating New Templates"](#), for more information.
4. Register templates in the Site Administration UI. See [Section D.7.6, "Registering New Templates in the Template Manager"](#), for more information.
5. Assign template source files to templates. See [Section 8.11, "Mapping Source Files to Display Templates"](#), for more information.
6. If desired, export or import existing Display Template mappings. See [Section D.3, "Display Template Mappings Import and Export"](#), for more information.

See *Oracle iStore API Reference Guide* for more information about Oracle iStore Java APIs and standards for Oracle iStore JSP customization.

### D.7.2.1 Upgrade Strategy for Custom JSPs

**Note:** During upgrades, Oracle iStore does not alter custom templates and their JSP mappings -- nor does it overwrite mappings of JSP files to specific site-language combinations.

## D.7.3 Creating Template Source Files

You can create new JSP templates to replace or add to the Oracle iStore seeded templates. Different physical JSP templates can be used at run-time based on the user's language and the site being accessed.

---

---

**CAUTION:** Never change an original JSP from Oracle iStore.

To modify a JSP, make a copy of the original JSP and modify only the copy.

---

---

It is recommended that you use Oracle JDeveloper to create and modify JSP templates. Although you can create JSPs with any HTML or text editor, Oracle JDeveloper also enables you to debug the code.

The major skills required to create and modify templates are HTML and Java. Java language methods in the HTML content generate dynamic content on the web page.

### D.7.3.1 Example JSP Structure

The structure of a JSP is demonstrated in the following HTML example.

```
<HTML>
<% import="oracle.apps.ibe.util.*" %>
....
....
<P> Name : <% = customer.getName(12334) %>
 Where customer is a Java class on the server and getName is a public method
 in the class to retrieve the customer name.

<P> Picture: <IMG SRC = "<%= customer.getPict(12334) %>">
 This step can retrieve the image file name from the customer Java class on the
 server.

....
</HTML>
```

### D.7.3.2 Where to Store JSP Source Code

The default UNIX directory for JSP source code is `$COMMON_TOP/html` directory. **Store all of your source JSPs in this directory.** This will make future Oracle iStore upgrades less problematic.

### D.7.3.3 Reboot the Server

Changes made to the JSPs may not appear immediately on the web sites, since you must reboot the Apache server before changes take effect.

Deleting the server cache has the same effect as rebooting the Apache server. The server cache is located in the UNIX directory `$COMMON_TOP/html/_pages/oa_html`. This cache directory contains .java and .class files that are generated after the JSP that has been called is translated. These can be safely deleted and will be regenerated when the JSP is invoked through an HTTP request.

After creating or modifying templates, you can pre-compile them to check for compilation errors and to increase the speed of the initial loading.

## D.7.4 JSP Naming Conventions

Modify JSP source files only after copying them first. As a best practice, all modified JSPs should follow a standard naming convention.

Note that having a standard naming convention is a best practice suggestion only; it is not mandatory to use a specific naming convention in order for the JSPs to be valid.

### D.7.5 Creating New Templates

Creating new templates involves giving the new templates names, descriptions, programmatic access names, and specifying the different physical JSP source files to be used at run-time based on language and specialty site.

The template name is the catalog name that is easy to communicate and use when planning your page designs. An example is **ProductHome**. Template names may be translated for convenience in site administration.

Every template name also has a programmatic access name that is short, unique, and not as descriptive. You will be using the programmatic access names to access the templates via an Oracle iStore public API in your JSP page. An example is **phome**. Programmatic access names are not translated.

The template name and programmatic access name potentially can represent several physical template source files. Each physical file can be assigned to combinations of sites and languages. When Oracle iStore retrieves an assigned template name, the template source file is determined by the mapping of the template name to the current site and language.

The Display Manager is the class that implements Oracle iStore’s Template Manager. The Template Manager maintains a mapping from a template programmatic access name to a physical name (JSP) in the file system.

To use the Site Home Page as an example, STORE\_HOME (programmatic access name) maps to ibezhome.jsp (physical file). When a web site is active, the Display Manager determines which physical file to call, based on the site being accessed and the user’s language. Different source files can be called for different site-language combinations.

The following table, [Table D–6, "Sample JSP File Names for the Template Name ProductHome"](#), shows examples of file names for a fictitious template called **ProductHome**.

**Table D–6    Sample JSP File Names for the Template Name ProductHome**

Template Name	Programmatic Access Name	File	Specialty Site	Language
ProductHome	phome	hom1f.jsp	Site 1	French
ProductHome	phome	hom1e.jsp	Site 1	English
ProductHome	phome	hom2f.jsp	Site 2	French
ProductHome	phome	hom2e.jsp	Site 2	English

In this example, if a French customer enters Site 1 the site displays the home page file `hom1f.jsp`, which displays information in the French language.

An English customer in the same Site sees `hom1e.jsp` instead.

If merchants simply want to display the same information in a different language, they can use just one JSP and use AK regions or FND messages for translation. Mapping different JSPs to different languages would be used to display different information, not just translated information.

You can find steps to use AK regions and FND Messages in the *Oracle Self Service Implementation Manual* available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

## D.7.6 Registering New Templates in the Template Manager

You must register new templates using the Advanced tab, Template Manager subtab in the Site Administration UI. Use this procedure to create or modify template names and programmatic access names, select default site-level template source files for them, and assign other template source files to them according to site and language settings.

For a list of seeded templates, see [Appendix E, "Display Templates and Media Objects"](#).

### Prerequisites

- A site has been created.
- A language has been defined.

### Steps

1. Log in to the Site Administration UI and select Advanced > Template Manager. The Templates page appears.
2. Select Add Template. The Add Template page appears.
3. In the Name field, enter the name by which the template is referred to during the planning stage, i.e., the common name.
4. In the Programmatic Access Name field, enter the logical name by which the template is referred to in its JSP source file.
5. Optionally, enter any keywords you wish to associate with this template in the Keywords field. After you enter and save keywords, you can use them in the search utility.

6. From the Applicable To LOV, select the display class for the template. The display class describes where the template will be used in the Customer UI. It has no programmatic purpose, but is helpful for grouping templates, and can be used when searching for templates using the search utility. See [Section E.1, "Template Categories"](#).
7. In the Default field, enter the name and extension (.jsp) of the default source file for the template. The default source file is used when a user attempts to retrieve the template and no other site-language mapping combination has been set up.

In a single-language implementation, the default source file will generally be the same for all sites.

You do not need to enter a directory name, just the JSP name and file extension.

8. Select Apply to save changes. The screen refreshes and is renamed Update Template. A Source File(s) area displays at the bottom of the screen. The template has now been mapped to the default source file (specified in the step above) for all sites and all languages.
9. If you are implementing multiple sites and languages, use the steps in [Section 8.11, "Mapping Source Files to Display Templates"](#).

## D.8 Understanding Catalog Flow

In preparing to customize Oracle iStore's catalog display, you must first understand the flow involved in the seeded Oracle iStore catalog templates and know the logical name, physical file, and description for each template. Understanding the interactions between the catalog templates simplifies the task of customizing them.

The catalog display follows either a section display flow or an item display flow.

This section contains:

- [Section D.8.1, "Section Display Flow"](#)
- [Section D.8.2, "Item Display Flow"](#)
- [Section D.8.3, "Template Pairing"](#)

### D.8.1 Section Display Flow

This section discusses the flow of section template display using either Fixed Layout or Configurable Layout.

Topics include:

- [Section D.8.1.1, "Section Display Flow for Fixed Layout"](#)
- [Section D.8.1.2, "Section Display Flow for Configurable Layout"](#)
- [Section D.8.1.3, "Section Routing Page"](#)
- [Section D.8.1.4, "Common Section Display Page Used in Fixed Layout"](#)
- [Section D.8.1.5, "Common Section Display Page Used in Configurable Layout"](#)
- [Section D.8.1.6, "Example for Fixed Layout"](#)
- [Section D.8.1.7, "Example for Configurable Layout"](#)

For an introduction to section Fixed Layout and Configurable Layout, see [Section 8.6.2, "Fixed Versus Configurable Layout with Section Display Templates"](#), and [Section 8.10.2, "Configurable and Fixed Layout Available"](#).

### **D.8.1.1 Section Display Flow for Fixed Layout**

Oracle iStore uses the following flow to display a section when Fixed Layout is being used:

1. When a section link is selected, the request goes to the display routing page, `STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)`, which determines which section processing template should be used and forwards the request to that template.
2. The section processing template sets the necessary attributes in the `PageContext.REQUEST_SCOPE` (including the logical template name of the center display page) and forwards to `STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp)`.
3. `STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp)` displays the section.

### **D.8.1.2 Section Display Flow for Configurable Layout**

Oracle iStore uses the following flow to display a section using Configurable Layout:

1. When a section link is selected, the request goes to the display routing page, `STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)`, which determines which Configurable Layout template should be used and forwards the request to that template. If the section is using seeded Configurable Layout, the layout template will be `STORE_SCT_CONFIGURABLE_LAYOUT (ibeCCtdCmnSctLayout.jsp)`.

2. The STORE\_SCT\_CONFIGURABLE\_LAYOUT (ibeCCtdCmnSctLayout.jsp) gets the bin template mapped to each location and the Display Template mapped to the center location, and displays the JSP pages mapped to those templates.

### D.8.1.3 Section Routing Page

STORE\_CTLG\_SCT\_ROUTE (ibeCCtpSctDspRte.jsp) is the routing page for sections. It contains the processing logic for determining which template to use when displaying a section. If there is no template associated with a section, the routing page determines which default template to use based on the hierarchy data setup. There are three default templates:

- Product Detail Template -- STORE\_CTLG\_FSUBSCT is used for sections with featured subsections.
- Subsection List Template -- STORE\_CTLG\_SCT\_BULLET\_SUBSCT is used for sections with only navigational subsections.
- Product Detail Template -- STORE\_CTLG\_LEAF\_SCT\_SINGLE is used for leaf sections.

The section routing page applies the following rules when determining which template should be used to display a section:

1. If the section is the site's root section, forward to STORE\_CTLG\_FSUBSCT\_FWD (ibeCCtpFwdSubSct.jsp). The site's root section is treated as a virtual section and the request is forwarded to its first navigational subsection.
2. If the section has a template associated with it (for Fixed Layout, it is a Display Template set up in the Section > Templates > Display Template page; for Configurable Layout, it is the seeded or a custom Configurable Layout set up in the Sections > Templates > Layout page), forward to that template.
3. If the section is a Leaf section, forward to STORE\_CTLG\_LEAF\_SCT\_SINGLE (ibeCCtpLeafSctSs.jsp).
4. If the section is a non-leaf section and the section has featured subsections, forward to STORE\_CTLG\_FSUBSCT (ibeCCtpFSubSct.jsp).
5. Otherwise, forward to STORE\_CTLG\_SCT\_BULLET\_SUBSCT (ibeCCtpStBlSuSt.jsp).

### D.8.1.4 Common Section Display Page Used in Fixed Layout

STORE\_CTLG\_SCT\_COMMON (ibeCCtdCmnSt.jsp) is the common display page used for displaying sections when using Fixed Layout. It displays each portion of

the common layout for section pages by including the JSP that handles the display in that location. STORE\_CTLG\_SCT\_COMMON includes the following components:

- The menu at the top of the page
- The left bins (Browse Bin, additional left bins) on the left side
- The center components (section path traversed, center display page) in the center of the page
- The right bins (Welcome Bin, eMerchandising posting from Oracle Marketing, additional right bins) on the right side

See [Section D.8.1.6, "Example for Fixed Layout"](#), for an example.

### **D.8.1.5 Common Section Display Page Used in Configurable Layout**

STORE\_SCT\_CONFIGURABLE\_LAYOUT (ibeCCtdCmnSctLayout.jsp) is the seeded common layout page used for displaying sections using Configurable Layout. It gets the template mapped to each location and the Display Template mapped to the center part, and displays the JSP pages mapped to those templates. STORE\_SCT\_CONFIGURABLE\_LAYOUT includes the following components:

- The menu at the top of the page
- The bins mapped to the top, bottom, left seven locations, right seven locations, and middle four locations
- The section path traversed and the central display page

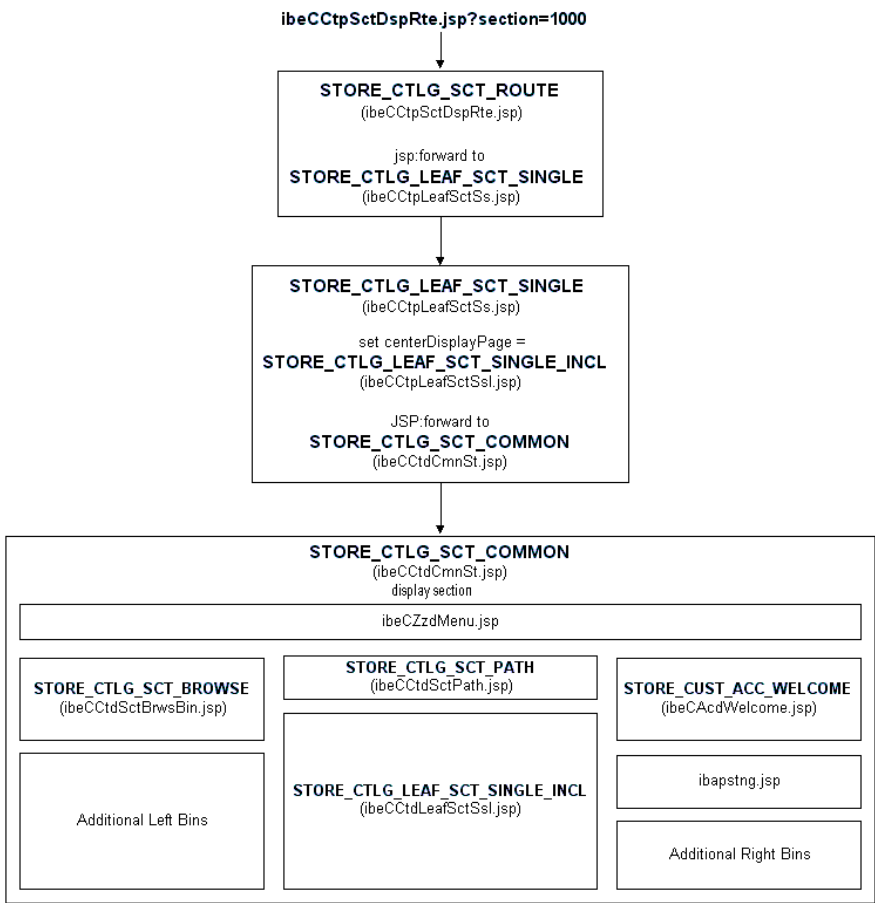
See [Section D.8.1.7, "Example for Configurable Layout"](#), for an example.

### **D.8.1.6 Example for Fixed Layout**

In the following example, [Figure D-5, "Catalog Template Flow for Link ibeCCtpSctDspRte.jsp?section=1000"](#), assume that the data is set up such that template STORE\_CTLG\_LEAF\_SCT\_SINGLE is associated with section 1000. This example illustrates the flow through the catalog templates when a user selects on the link `ibeCCtpSctDspRte.jsp?section=1000`.



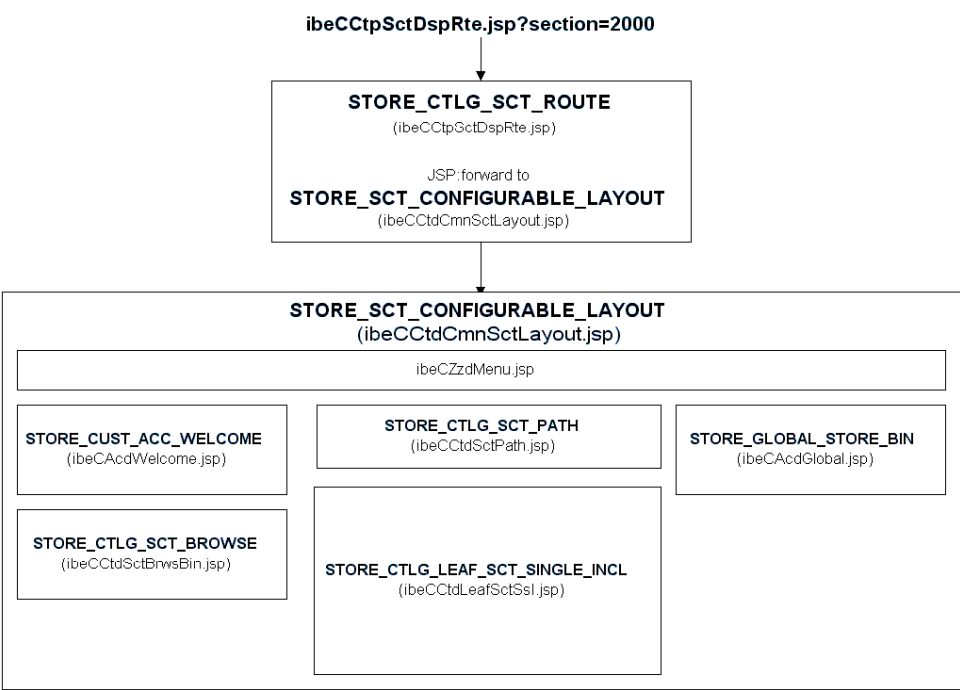
Figure D–5 Catalog Template Flow for Link `ibeCCTpSctDspRte.jsp?section=1000`



D.8.1.7 Example for Configurable Layout

In the following example, [Figure D–6, "Catalog Template Flow for Link `ibeCCTpSctDspRte.jsp?section=2000`"](#), assume that the data is set up such that section 2000 is using Configurable Layout, and select template `STORE_CUST_ACC_WELCOME` for the left 1 location, `STORE_CTLG_SCT_BROWSE` for the left 2 location, `STORE_GLOBAL_STORE_BIN` for the right 1 location, and `STORE_CTLG_LEAF_SCT_SINGLE_INCL` for the Display Template in the center. This example illustrates the flow through the catalog templates when a user selects on the link `ibeCCTpSctDspRte.jsp?section=2000`.

**Figure D–6    Catalog Template Flow for Link `ibeCtpSctDspRte.jsp?section=2000`**



D.8.2 Item Display Flow

Oracle iStore uses the following flow to display an item:

- 1. When an item link is selected, the request goes to `STORE_CTLG_ITM_ROUTE (ibeCtpItmDspRte.jsp)` which determines the item template to use (the template for display style `STORE_PRODUCT_DETAILS`) and forwards the request to that template. The default template is `STORE_CTLG_ITEM_DETAILS (ibeCCtdItemDetail.jsp)`.
- 2. The item template displays the item detail page.

D.8.3 Template Pairing

For each section display, there is a pair of templates:

- A processing page that sets attributes needed by the common display page
- A center display page which generates the HTML for the center of the page

The section processing page specifies which center display page should be used. The following naming convention can be used to identify which section processing page corresponds to which center display page.

- **Section Processing Logical Name:** SECTION\_PROCESS\_NAME
- **Section Center Display Logical Name:** SECTION\_PROCESS\_NAME\_INCL
- **Section Processing Physical File:** ibeCCTpName.jsp
- **Section Center Display Physical File:** ibeCCTdNameI.jsp

### Example

**Product Detail section Display Template:**

- **Section Processing Logical Name:** STORE\_CTLG\_FSUBSCT
- **Section Center Display Logical Name:** STORE\_CTLG\_FSUBSCT\_INCL
- **Section Processing Physical File:** ibeCCTpFSubSct.jsp
- **Section Center Display Physical File:** ibeCCTdFSubSctl.jsp

For a list of seeded templates, see [Appendix E, "Display Templates and Media Objects"](#).

## D.9 Customizing Section Templates

The following options are presented:

- [Section D.9.0.1, "Fixed and Configurable Layouts"](#)
- [Section D.9.0.2, "Fixed Layout"](#)
- [Section D.9.0.3, "Configurable Layout"](#)

### D.9.0.1 Fixed and Configurable Layouts

For both Fixed Layout and Configurable Layout, you can customize the following:

1. Customize the section routing behavior -- See [Section D.9.1, "Customizing the Section Routing Behavior"](#), for details.
2. Customize the section browse bin -- See [Section D.9.2, "Customizing the Section Browse Bin"](#), for details.
3. Customize the section path -- See [Section D.9.3, "Customizing the Section Path"](#), for details.

### D.9.0.2 Fixed Layout

For Fixed Layout, you have the following additional customization options:

1. Customize the section template common fixed layout -- See [Section D.9.4, "Customizing the Section Template Common Fixed Layout"](#), for details.
2. Create a section template with the common fixed layout. -- See [Section D.9.5, "Creating a Section Page With a Common Fixed Layout"](#), for details.
3. Create a section template with custom fixed layout -- See [Section D.9.6, "Creating a Section Page With a Custom Fixed Layout"](#), for details.

### D.9.0.3 Configurable Layout

For Configurable Layout, you have the following additional customization options:

1. Customize the section template common Configurable Layout -- See [Section D.9.7, "Customizing the Section Template Common Configurable Layout"](#), for details.
2. Create a custom Configurable Layout -- See [Section D.9.8, "Creating a Custom Configurable Layout"](#), for details.
3. Create a central Display Template for Configurable Layout -- See [Section D.9.9, "Creating a Center Display Template for Configurable Layout"](#), for details.

## D.9.1 Customizing the Section Routing Behavior

In most cases, the section routing behavior will not need changes since it is data driven. `STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)` contains processing logic for determining the template to forward to based on the template associated with a section. If the section routing behavior needs to be changed (for example, to change the default destination pages when no template is associated with a section), customize `STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)`.

### Steps

1. Copy `ibeCCtpSctDspRte.jsp` into a new JSP.
2. Make the necessary changes in the new JSP.
3. Modify the template data setup. In this case, the same logical template name should be used because `STORE_CTLG_SCT_ROUTE` is used in all other JSPs when building links to sections.

4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE\_CTLG\_SCT\_ROUTE. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English

Each time a new language is added, you must add a new mapping.

## D.9.2 Customizing the Section Browse Bin

If the display of the section Browse Bin (section navigation bin) needs to be changed, customize STORE\_CTLG\_SCT\_BROWSE (ibeCCtdSctBrwsBin.jsp).

### Steps

1. Copy ibeCCtdSctBrwsBin.jsp to a new JSP.
2. Make the necessary changes in the new JSP.
3. Modify the template data setup. In this case, the same logical template name should be used because STORE\_CTLG\_SCT\_BROWSE is used in other JSPs when including the browse bin.
4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE\_CTLG\_SCT\_BROWSE. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping.

## D.9.3 Customizing the Section Path

If the display of the section path needs to be changed, customize STORE\_CTLG\_SCT\_PATH (ibeCCtdSctPath.jsp).

**Steps**

1. Copy ibeCCtdSctPath.jsp into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because STORE\_CTLG\_SCT\_PATH is used in other JSPs when including the path traversed.
4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE\_CTLG\_SCT\_PATH. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings"

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping.

## D.9.4 Customizing the Section Template Common Fixed Layout

In the seeded templates, all the section templates using Fixed Layout share the same layout. This layout is specified in STORE\_CTLG\_SCT\_COMMON (ibeCCtdCmnSt.jsp). All section pages using Fixed Layout are ultimately displayed by this page, with the center display page changing dynamically based on the attributes set by the section processing page. If the common layout model will be used, but the layout needs to be changed, customize STORE\_CTLG\_SCT\_COMMON (ibeCCtdCmnSt.jsp).

**Steps**

1. Copy ibeCCtdCmnSt.jsp into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because the processing section JSPs forward to STORE\_CTLG\_SCT\_COMMON to display the section.
4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE\_CTLG\_SCT\_COMMON. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English

Each time a new language is added, you must add a new mapping.

## D.9.5 Creating a Section Page With a Common Fixed Layout

To provide custom section display, create new section pages. If the new section display will use a common layout, two new JSPs need to be created.

**Note:** The CENTER\_DISPLAY\_PAGE used in this example is only a sample logical template used for the purposes of example, not a real template seeded out-of-the-box.

### Steps

1. Create a section processing page. This can be done by copying an existing section processing page (such as ibeCCtpFSubSct.jsp) or using the example below as a guideline.

```
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.ibe.displaymanager.DisplayManager" %>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%@include file="ibeCZzpHeader.jsp" %>

<%
 String JSP_PAGE_NAME = "sectionProcessssPage.jsp";
 String lSectionIdStr = "";
 String lCenterDisplayPage = "";
 String lBeginIndexStr = "";

 /* Welcome Bin */
 pageContext.setAttribute("showWelcomeBin", "true",
 PageContext.REQUEST_SCOPE);

 /* Center Display Page */
 lCenterDisplayPage =
 DisplayManager.getTemplate("CENTER_DISPLAY_PAGE").getFileName();
 if(lCenterDisplayPage == null)
```

```
{
 lCenterDisplayPage = "";
 IBEUtil.log(JSP_PAGE_NAME,
 "Null template found for logical template name " +
 "CENTER_DISPLAY_PAGE",
 Logger.ERROR);
}

pageContext.setAttribute("centerDisplayPage", lCenterDisplayPage,
 PageContext.REQUEST_SCOPE);

/* Get/Set section ID */
lSectionIdStr =
 (String) pageContext.getAttribute("section",
 PageContext.REQUEST_SCOPE);
if(lSectionIdStr == null || lSectionIdStr.equals(""))
{
 lSectionIdStr = (String) request.getParameter("section");
 if(lSectionIdStr == null)
 {
 lSectionIdStr = "";
 IBEUtil.log(JSP_PAGE_NAME, "Section is null", Logger.ERROR);
 }
}

pageContext.setAttribute("section", lSectionIdStr,
 PageContext.REQUEST_SCOPE);

/* Get/Set beginIndex */
lBeginIndexStr =
(String) pageContext.getAttribute("beginIndex",
 PageContext.REQUEST_SCOPE);
if (lBeginIndexStr == null || lBeginIndexStr.equals(""))
{
 lBeginIndexStr = request.getParameter("beginIndex");
 if (lBeginIndexStr != null)
 {
 pageContext.setAttribute("beginIndex", lBeginIndexStr,
 PageContext.REQUEST_SCOPE);
 }
}

if (IBEUtil.showPosting())
{
 // set item ids in the PageContext.REQUEST_SCOPE for use by
```



```

 // eMerchandising postings

 int[] itemIds = new int[0];

 // code to populate itemIds based on the items that will be displayed
 // on this section page

 if (itemIds.length > 0)
 pageContext.setAttribute("itemIds", itemIds, PageContext.REQUEST_
SCOPE);
 }

 String lCommonPage =
 DisplayManager.getTemplate("STORE_CTLG_SCT_COMMON").getFileName();
 %>

 <jsp:forward page="<%=lCommonPage%>" />

```

2. Create a center display page. This can be done by copying an existing section center display page (such as `ibeCCtdFSubSctI.jsp`) or using the example below as a guideline.

```

<%@include file="ibeCZzpRuntimeIncl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.ibe.displaymanager.*" %>
<%@page import="oracle.apps.jtf.base.resources.Architecture" %>
<%@page import="oracle.apps.jtf.base.interfaces.MessageManagerInter" %>
<%@page import="oracle.apps.jtf.base.Logger" %>

<%
 // processing logic to retrieve all section and item information that will
 // be displayed on the page

 boolean bSectionLoaded = false;
 Section s = null;
 // declare variables for other objects that will be displayed:
 // for example, featured subsections, navigational subsections, items,
 // item prices, etc.

 String lSectionIdStr =
 IBEUtil.nonNull((String)pageContext.getAttribute("section",
 PageContext.REQUEST_SCOPE));

```

```
try {
 int lSectionId = Integer.parseInt(lSectionIdStr);
 s = Section.load(lSectionId, Section.DEEP);
 bSectionLoaded = true;

 // additional code to retrieve objects that will be displayed on the
page:
 // for example, featured subsections, navigational subsections, items,
 // item prices, etc.

} catch (NumberFormatException e) {
 IBEUtil.log(JSP_PAGE_NAME, "Could not parse section id=");
 IBEUtil.log(lSectionIdStr);
} catch (SectionNotFoundException e) {
 IBEUtil.log(JSP_PAGE_NAME, "Could not load section. Section id=");
 IBEUtil.log(JSP_PAGE_NAME, lSectionIdStr);
}

if (bSectionLoaded)
{
%>

<table width="100%">
<tr>
<td valign="top" width="100%" >
<!-- start middle column content-->

<%-- code to display section --%>

</td></tr></table>
<%
} // end section was loaded
%>
```

3. In the Site Administration UI, create a new logical template for the section processing page. Make sure that the category of the template is one of the following:
  - a. Section Contains Featured Subsection
  - b. Section Contains Navigational Subsections Only
  - c. Section Contains Products Only
  - d. Uncategorized Section Display Template

4. In the Site Administration UI, create a new logical template for the center display page. Make sure that the category of the template is one of the following:
  - a. Component for Sections Containing Featured Subsections
  - b. Component for Sections Contain Navigational Subsections Only
  - c. Component for Sections Containing Products Only
  - d. Component for Sections
5. Modify the section processing page as needed.

In the JSP, change the logical template name used for the center display page to be the logical template name created for the new center display page. Change

```
lCenterDisplayPage =
 DisplayManager.getTemplate("STORE_CTLG_FSUBSCT_INCL").getFileName();
```

to

```
lCenterDisplayPage =
 DisplayManager.getTemplate("CENTER_DISPLAY_PAGE").getFileName();
```

If Oracle Marketing's eMerchandising postings will be used, an `int[]` containing the item IDs of the items that will be displayed on the page must be set in the `PageContext.REQUEST_SCOPE`. There are examples of how to do this in the seeded templates.

6. Modify the display page as needed.
 

Retrieve the necessary section and item information using the Section and Item APIs, which are described in *Oracle iStore API Reference Guide*.

Display the information as desired.
7. In the Site Administration UI, map the new template to a section as desired. See [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), for steps.

## D.9.6 Creating a Section Page With a Custom Fixed Layout

To provide custom section display, create new section pages. If the new section display will use its own custom layout, only one new JSP needs to be created.

## Steps

1. Create a section Display Template. See the example below.

```
<%@include file="jtfincl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="java.math.BigDecimal" %>
<%@page import="oracle.apps.jtf.base.Logger" %>

<% include file="ibeCZzpHeader.jsp" %>
<%
 String JSP_PAGE_NAME = "mySectionJsp.jsp";
 MessageManagerInter msgMgr =
 Architecture.getMessageManagerInstance();
 int lSectionId = -1;
 String lSectionIdStr = "";
 String lShowWelcomeBinStr = "";
 boolean bShowWelcomeBin = true;
 String browsePage = "", pathPage = "", welcomePage = "";
 Section lSection = null;

 // declare variables for other objects that will be
 // displayed: for example, featured subsections, items, item prices, etc.

 /* Get section ID String */
 lSectionIdStr =
 (String)pageContext.getAttribute("section", PageContext.REQUEST_SCOPE);
 try
 {
 lSectionId = Integer.parseInt(lSectionIdStr);
 }
 catch(NumberFormatException e)
 {
 lSectionId = StoreMinisite.getRootSectionID().intValue();
 }

 /* Get show welcome bin */
 lShowWelcomeBinStr =
 (String)pageContext.getAttribute("showWelcomeBin",
 PageContext.REQUEST_SCOPE);
 if(lShowWelcomeBinStr == null || lShowWelcomeBinStr.equals(""))
 {
 lShowWelcomeBinStr = "true";
 }
}
```

```

 }

 if(!ShowWelcomeBinStr.equalsIgnoreCase("false"))
 {
 bShowWelcomeBin = false;
 }

 /*
 * Get the value of all the pages and bins to display
 */

 /* Section Hierarchy Tree Browse Bin */
 if(IBEUtil.useFeature("IBE_USE_SECTION_BIN"))
 {
 browsePage =
 DisplayManager.getTemplate("STORE_CTLG_SCT_
 BROWSE").getFileName(); if (browsePage == null)
 {
 browsePage = "";
 }
 }

 /* Section Section Path Bin */
 if(IBEUtil.useFeature("IBE_USE_SECTION_PATH"))
 {
 pathPage =
 DisplayManager.getTemplate("STORE_CTLG_SCT_PATH").getFileName();
 if (pathPage == null)
 {
 pathPage = "";
 }
 }

 /* Welcome Page Bin */
 if(bShowWelcomeBin)
 {
 welcomePage =
 DisplayManager.getTemplate("STORE_CUST_ACC_WELCOME").getFileName();

 if(welcomePage == null || welcomePage.equals(""))
 {
 bShowWelcomeBin = false;
 IBEUtil.log(JSP_PAGE_NAME,
 "Welcome Page is either null or not specified",
 Logger.ERROR);
 }
 }

```

```
 }
 }

 if (IBEUtil.showPosting())
 pageContext.setAttribute("pageType", "SECTION",
 PageContext.REQUEST_SCOPE);

 /* load section and other objects that will be displayed */
 try
 {
 lSection = Section.load(lSectionId);

 // additional code to retrieve other objects that will be displayed
 // on the page: for example, featured subsections, navigational
 // subsections, items, item prices, etc.

 if (IBEUtil.showPosting())
 {
 // set item ids in the PageContext.REQUEST_SCOPE for use by
 // eMerchandising postings

 int[] itemIds = new int[0];

 // code to populate itemIds based on the items that will be
displayed
 // on this section page

 if (itemIds.length > 0)
 pageContext.setAttribute("itemIds", itemIds,
 PageContext.REQUEST_SCOPE);
 }
 }
 catch (SectionNotFoundException ex)
 {
 IBEUtil.log(JSP_PAGE_NAME,
 "Could not load (shallow) section with ID" + lSectionId,
 Logger.ERROR);
 lSection = null;
 }

 if (lSection != null)
 {
 pageContext.setAttribute("_pageTitle", lSection.getDisplayName(),
 PageContext.REQUEST_SCOPE);
 }
```

```

 }
 else
 {
 pageContext.setAttribute("_pageTitle", "", PageContext.REQUEST_SCOPE);
 }
}

<%>

<%@ include file="ibeCCTpPostingI.jsp" %>
<%@ include file="ibeCZzdTop.jsp" %>
<%@ include file="ibeCZzdMenu.jsp" %>

<!-- body section ----->
<table border="0" width="100%">

 <tr>
 <td> </td>

 <!-- left column ----->
 <td valign="top">

 <!-- sections bin ----->
 <%
 if(IBEUtil.useFeature("IBE_USE_SECTION_BIN") &&
 !browsePage.equals(""))
 {
 %>
 <jsp:include page="<%=browsePage%>" flush="true" />

 <%
 }
 %>
 </td>

 <!-- center column ----->
 <td valign="top" width="100%">
 <%
 if(IBEUtil.useFeature("IBE_USE_SECTION_PATH") &&
 !pathPage.equals(""))
 {
 %>
 <table width="100%">
 <tr>
 <td colspan="2" class="smallLink">
 <jsp:include page="<%=pathPage%>" flush="true" />
 </td>
 </tr>
 </table>
 %>
 </td>
 </tr>
</table>

```

```
 <td>

 </td>
 </tr>
</table>

<%
}

if (lSection != null)
{
 // code to display section/items.
 // for examples, see out of the box section center display templates
}
%>

</td>

<!-- right column ----->
<td valign="top">
 <!-- RHS bins ---->

 <!-- welcome bin ----->
<%
if(bShowWelcomeBin)
{
%>
 <jsp:include page="<%=welcomePage%>" flush="true" />

<%
}
%>

<%
if(IBEUtil.showPosting())
{
 IBEUtil.log(JSP_PAGE_NAME, "eMerchandising posting - BEGIN");
 try {
%>
 <jsp:include page="ibapstng.jsp" flush="true" />

<%
 } catch (Throwable t) {
 IBEUtil.log(JSP_PAGE_NAME,
 "Error occurred while including eMerchandising page");
 }
 IBEUtil.log(JSP_PAGE_NAME, "eMerchandising posting - END");
}
%>
```



```

 </td>
 </tr>
</table>

<%% include file="ibeCZzdBottom.jsp" %>

```

2. In the Site Administration UI, create a new logical template for the section display page. Make sure that you create the template as one that "Displays: section."
3. In the Site Administration UI, map the new template to a section as desired. See [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), for steps.

## D.9.7 Customizing the Section Template Common Configurable Layout

The layout template `STORE_SCT_CONFIGURABLE_LAYOUT` (`ibeCCtdCmnSctLayout.jsp`) is used to display the layout for all the sections using seeded Configurable Layout. This common Configurable Layout template gets the template mapped to each location and the Display Template mapped to the center part, and displays the JSP pages mapped to those templates. If you need to change the layout of all the section using seeded layout template, customize `STORE_SCT_CONFIGURABLE_LAYOUT` (`ibeCCtdCmnSctLayout.jsp`).

### Steps

1. Copy `ibeCCtdCmnSctLayout.jsp` into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. Log in to the Site Administration UI and add the necessary logical to physical template mappings in `STORE_SCT_CONFIGURABLE_LAYOUT`. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in Specialty Site And Language Mappings:

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping.

## D.9.8 Creating a Custom Configurable Layout

You can create a custom Configurable Layout. The new custom layout will be displayed in the Select Layout droplist in Sections > Templates > Layout page during setup, and you can use the custom layout for a section. The custom layout page should have the similar logic as that in the seeded Configurable Layout: gets the template mapped to each location and the Display Template mapped to the center part, and display the JSP pages mapped to those templates. But it can have different display layout.

### Steps

1. Create a custom Configurable Layout page. This can be done by copying and modifying the seeded Configurable Layout page (`ibeCCtdCmnSctLayout.jsp`). In the layout page, the following API can be used to get the bin template mapped to each location (including the Display Template mapped to the center):

```
Public Template
Oracle.apps.ibe.displaymanager.DisplayManager.getSection
ComponentTemplate (int SectionId, String locationCode)
```

The location code can be Top, Bottom, Left 1 through Left 7, Right 1 through Right 7, Middle 1 through Middle 4, or Center. Center is used to get the center Display Template. If there is no template mapped to the location, or there is no JSP mapped to the template, the API returns null.

2. In the Site Administration UI, create a new logical template for the custom Configurable Layout page. Make sure that the category of the template is Section Layout. Set the custom Configurable Layout page as the default mapping for the template.
3. Map the custom layout template to the section, and configure the bin templates mapped to each location. [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), for steps.

## D.9.9 Creating a Center Display Template for Configurable Layout

You can create a custom center Display Template and map it to a section using Configurable Layout. At run-time, the Configurable Layout template will load the Display Template mapped to the center part, and display the JSP page mapped to that template.

**Steps**

1. Create a center display page. This display page is similar to the display page created in step 2 of [Section D.9.5, "Creating a Section Page With a Common Fixed Layout"](#). It can be done by copying an existing section center display page (such as `ibeCCtdFSubSctI.jsp`) or using the example described in [Section D.9.5, "Creating a Section Page With a Common Fixed Layout"](#), step 2, as a guideline.
2. In the Site Administration UI, create a new logical template for the center display page. Make sure that the category of the template is one of the following:
  - a. Component for Sections Containing Featured Subsection
  - b. Component for Sections Contain Navigational Subsections Only
  - c. Component for Sections Containing Products Only
  - d. Component for Sections
3. In the Site Administration UI, map the new center Display Template to a section using Configurable Layout, as desired. See [Section 8.8.6, "Selecting Layout and Setting Display Templates for Sections"](#), for steps.

## D.10 Customizing Item Templates

You can customize item routing behavior and create item detail templates. See:

- [Section D.10.1, "Customizing the Item Routing Behavior"](#)
- [Section D.10.2, "Creating an Item Detail Template"](#)

### D.10.1 Customizing the Item Routing Behavior

In most cases, the item routing behavior will not need changes since it is data driven. `STORE_CTLG_ITM_ROUTE` (`ibeCCtpItmDspRte.jsp`) contains processing logic for determining the template to forward to based on the template associated with display context `STORE_PRODUCT_DETAILS` for a particular item. If the item routing behavior needs to be changed (for example, to change the display context that is used), customize `STORE_CTLG_ITM_ROUTE` (`ibeCCtpItmDspRte.jsp`).

**Steps**

1. Copy `ibeCCtpItmDspRte.jsp` into a new JSP.

2. Modify the new JSP as needed. For example, change the display context that is used. If modifying the display context, make sure that all templates associated with the new display context produce HTML for displaying an entire page.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because STORE\_CTLG\_ITM\_ROUTE is used in all other JSPs when building links for items. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE\_CTLG\_ITM\_ROUTE. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL sites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

## D.10.2 Creating an Item Detail Template

To provide a custom display of the item detail page, create a new item detail page.

### Steps

1. Copy ibeCCtdItemDetail.jsp into a new JSP or use the example below as a guideline.

```
<%@page import="oracle.apps.ibe.order.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.jtf.displaymanager.*" %>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%@page import="oracle.apps.jtf.minisites.*" %>

<%% include file="ibeCZzpHeader.jsp" %>
<%
 MessageManagerInter msgMgr = Architecture.getMessageManagerInstance();
 pageContext.setAttribute("_pageTitle",
 msgMgr.getMessage("IBE_PRMT_CT_PRODUCT_DETAILS"),
 PageContext.REQUEST_SCOPE);
```

```

String lItemId =
 IBEUtil.nonNull((String)pageContext.getAttribute("item",
 PageContext.REQUEST_SCOPE));

if (lItemId.equals(""))
{
 lItemId = IBEUtil.nonNull(request.getParameter("item"));
 pageContext.setAttribute("item", lItemId, PageContext.REQUEST_SCOPE);
}

if (IBEUtil.showPosting())
{
 // used by ibeCctpPostingI.jsp
 pageContext.setAttribute("pageType", "ITEM", PageContext.REQUEST_SCOPE);

 // set itemIds[] for eMerchandising posting
 try {
 int[] itemIds = new int[1];
 String itemIdStr =
 (String) pageContext.getAttribute("item", PageContext.REQUEST_
SCOPE);
 itemIds[0] = Integer.parseInt(itemIdStr);
 pageContext.setAttribute("itemIds", itemIds, PageContext.REQUEST_
SCOPE);
 } catch (NumberFormatException e) {}
}
%>

<%% include file="ibeCctpPostingI.jsp" %>
<%% include file="ibeCZzdTop.jsp" %>
<%% include file="ibeCZzdMenu.jsp" %>

<%
 String lSectionId = "";
 int sectid = 0, itmid = 0;

 Item itm = null;

 // declare variables for other objects that will be
 // displayed: for example, item images, item prices, item flexfields,
 // related items, etc.

 lSectionId = IBEUtil.nonNull(request.getParameter("section"));
 if (lSectionId.equals(""))
 lSectionId =

```

```
 IBEUtil.nonNull((String)pageContext.getAttribute("section",
 PageContext.REQUEST_SCOPE));

/* sections path */
if (IBEUtil.useFeature("IBE_USE_SECTION_PATH"))
{
 try {
 sectid = Integer.parseInt(lSectionId);
 pageContext.setAttribute("section", String.valueOf(sectid),
 PageContext.REQUEST_SCOPE);

 pathPage =
 DisplayManager.getTemplate("STORE_CTLG_SCT_PATH").getFileName();
 } catch (NumberFormatException e) { }
 if (pathPage == null)
 pathPage = "";
}

try {
 itmid = Integer.parseInt(lItemId);
 itm = Item.load(itmid, Item.DEEP);
 bItemLoaded = true;

// additional code to retrieve other objects that will be displayed
// on the page: for example, item images, item prices, related items, etc.

 } catch (NumberFormatException e) {
 IBEUtil.log("ibeCCTdItemDetail.jsp", "Could not parse item id="
 +lItemId);
 } catch (ItemNotFoundException e) {
 IBEUtil.log("ibeCCTdItemDetail.jsp", "Could not load item id="+lItemId,
 Logger.ERROR);
 }

 if (bItemLoaded)
 {
%>

<!-- body section
----->
<table border="0" width="100%">

<%
 if (IBEUtil.showPosting()) {
%>
```

```

 <!-- eMerchandising integration ----->
 <tr><td colspan="4" align="center">
<% try {
%>
 <jsp:include page="ibapstng.jsp" flush="true" />
<% } catch (Throwable e) {
 IBEUtil.log("ibeCCTdItemDetail.jsp", "eMerchandising error",
Logger.ERROR);
 }
%>
 </td></tr>
<% } //end eMerchandising installed
%>
 <tr><td> </td>
<%
 if(IBEUtil.useFeature("IBE_USE_SECTION_PATH") &&
!pathPage.equals(""))
 {
%>
 <td colspan="4" class="smallLink">
 <jsp:include page="<%=pathPage%>" flush="true" />
 </td>
<% }
%>
 </tr>
 <tr><td valign="top"> </td>

 <!-- center column
 ----->
 <td valign="top" width="70%">
 <table border="0" cellpadding="0" cellspacing="0">
<!-- code to display item --%>
 </table>
 </td>

 <!-- right column
 ----->
 <td valign="top" width="20%">
 <table border="0" cellpadding="0" cellspacing="0">
<!-- code to display right bins --%>
 </table>
 <p> </p>
 <p> </p>
 </td></tr></table> <!-- end page table --%>
<% } // end item loaded

```

```
%>
<%@ include file="ibeCZzdBottom.jsp" %>
<!-- ibeCCTdItemDetail.jsp end -->
```

2. Modify the new item detail page as needed.

Retrieve the necessary item information using the Item APIs, which are described in *Oracle iStore API Reference Guide*.

Display the information as desired.

3. The template data setup will need to be modified. In the Site Administration UI, create a new logical template for the new item detail display page. Make sure that you create the template as one that displays products.
4. If the new item detail page should be used as the default template for a display context (such as STORE\_PRODUCT\_DETAILS), follow the steps in [Section D.5, "Using Display Styles for Default Display"](#), for map the new template to a display style.
5. To associate the new item detail template to the appropriate display style at the item level, follow the steps in [Section 8.9.7, "Setting Display Templates for Products"](#).
6. To associate the new item detail template to the appropriate display style at the category level, follow the steps in [Section D.5.1, "Configuring Product Presentation at the Category Level"](#).

Repeat this step for each applicable category.

## D.11 Customizing the Style Sheet

If you are not using customized style sheets, Oracle iStore uses a default style sheet to render both the Site Administration UI and Customer UI style sheets. You can provide a custom style sheet using the following procedure.

### Prerequisite

Consider the value of the profile option, FND: Branding Size. If using customized style sheets, the style sheet used depends on the setting of this profile option. Following is the impact of the profile option on the three style sheet templates. Remember, this behavior occurs only if a source file has been mapped to the template discussed below.



- **Regular** --- Oracle iStore uses STORE\_STYLE\_SHEET template to render the UI. By default, this style sheet is mapped to jtfucss.css. This will be the default style sheet used if no customizations are set up.
- **Medium** --- Oracle iStore uses STORE\_STYLE\_SHEET\_MED template to render the UI.
- **Small** --- Oracle iStore uses STORE\_STYLE\_SHEET\_SML template to render the UI.

See [Section A.3.1.1, "FND: Branding Size"](#) for information about how this profile changes navigation icons.

### Steps

1. Copy jtfucss.css into another file and make the desired changes to the new file, using the style sheet editor of your choice. Or, create a new style sheet file(s).
2. Map the logical templates discussed above, as desired, to the new files. See [Section 8.11, "Mapping Source Files to Display Templates"](#), for instructions.
3. Restart the Apache server after making these changes.

### Additional Guidelines

If using a single, customized file for all three branding size profile settings, then map this file to each of the three style sheet templates mentioned above. If you are using separate customized files for the three branding sizes, you can map the source files separately to each style sheet template. If using only the out-of-box stylesheet files, and jtfucss\_sml.css and jtfucss\_med.css are in your instance, map jtfucss\_sml.css to STORE\_STYLE\_SHEET\_SML, and jtfucss\_med.css to STORE\_STYLE\_SHEET\_MED.

## D.12 Customizing Help

The help icon on the menu will only be displayed if there is a template association for the help page.

Provide a custom help page using the following procedure.

### Steps

1. Copy ibeCZzdHelp.jsp into another file.
2. Make the necessary changes to the JSP.

3. Modify the template data setup. Log in to the Site Administration UI and add the necessary logical to physical template mappings for `STORE_HELP_PAGE`. In the Template Details page, add a new source file for the new help page. Add the necessary mappings for the desired site-language combinations. To use this source file for all sites and all languages, add a mapping for all sites, all languages. The changes will not be overwritten when patches are applied because there is no seeded default value for `STORE_HELP_PAGE`.

## D.13 API Documentation

To make advanced changes to the Customer UI page displays, beyond bin layout and text messages, you must have complete knowledge of the APIs being called from the JSP template source file. The APIs are the key for displaying data on the site pages. These are the application objects and beans. Customers and users cannot modify these class files.

For public class API documentation, see *Oracle iStore API Reference Guide*.

---

# Display Templates and Media Objects

This appendix lists the Oracle iStore 11i seeded Display Templates.

For an overview of how Oracle iStore uses Display Templates to present the Customer UI, see [Section 8.2, "Display Templates Overview"](#).

Main topics in this appendix include:

- [Section E.1, "Template Categories"](#)
- [Section E.2, "Catalog Display Templates"](#)
- [Section E.3, "Seeded Bin Display Templates"](#)
- [Section E.4, "Shopping Cart Display Templates"](#)
- [Section E.5, "Service Items Display Templates"](#)
- [Section E.6, "Descriptive Flexfield Display Templates"](#)
- [Section E.7, "Shopping List Display Templates"](#)
- [Section E.8, "Orders and Checkout Display Templates"](#)
- [Section E.9, "Express Checkout Display Templates"](#)
- [Section E.10, "Post Sales Display Templates"](#)
- [Section E.11, "Returns Display Templates"](#)
- [Section E.12, "Available to Promise Display Templates"](#)
- [Section E.13, "User Management Display Templates"](#)
- [Section E.14, "Reports and Bins Display Templates"](#)
- [Section E.15, "Product Search Display Templates"](#)
- [Section E.16, "Other Display Templates"](#)

- [Section E.17, "Oracle Configurator and BOM Integration Display Templates"](#)
- [Section E.18, "Oracle iSupport Integration Display Templates"](#)
- [Section E.19, "Oracle Partner Management Integration Display Templates"](#)
- [Section E.20, "Oracle Quoting Integration Display Templates"](#)
- [Section E.21, "Non-Current Display Templates"](#)
- [Section E.22, "Media Objects"](#)

## E.1 Template Categories

Display Templates are categorized by the type of display they enable in a speciality site. The category is known as the *Applicable To* category. You can search by these categories in the Site Administration UI. Following are the seeded categories:

- Address Book
- Catalog Routing
- Checkout
- Common Components
- Component for Sections Containing Featured Subsections
- Component for Sections Containing Products Only
- Component for Sections Contain Navigational Subsections Only
- Configurator
- Contact Point
- Express Checkout
- Organization Profile
- Others
- Product Bin
- Product Search
- Post Sales
- Registration
- Registration Bin

- Returns
- Section Layout
- Section Contains Featured Subsection
- Section Contains Products Only
- Section Contains Navigational Subsections Only
- Shopping Cart
- Shopping Cart Bin
- Shopping List
- User Management
- User Profile
- Uncategorized section display templates

## E.2 Catalog Display Templates

The following table, [Table E-1, "Catalog Display Templates"](#), lists the seeded Catalog Display Templates. Note that this table does not include the bins listed in [Table E-2, "Seeded Bins Display Templates"](#), or the other catalog Display Templates listed in [Section E.5, "Service Items Display Templates"](#).

**Table E-1    Catalog Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Add Item Bin	STORE_CTLG_ADD_ITEM_BIN	Product Bin	Add Item Bin	ibeCCtdAddItemBin.jsp
Catalog section common page	STORE_CTLG_SCT_COMMON	Section Layout	Common display page, with bins, center page, menu, etc.	ibeCCtdCmnSt.jsp
Multilevel Subsection List	STORE_CTLG_DLDN_SCT_BULLET	Section Contains Navigational Subsections Only	Parent section short description with all subsections and their child section names.	ibeCCtpDdLfStBl.jsp

**Table E-1 Catalog Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Subsection List with product detail	STORE_CTLG_DRILL_LEAF	Section Contains Navigational Subsections Only	Parent section name, short description and image, with subsections and their product detail.	ibeCCtpDrillLeaf.jsp
Subsection List	STORE_CTLG_SCT_BULLET_SUBSCT	Section Contains Navigational Subsections Only	Parent section short and long description plus additional information with Subsection List.	ibeCCtpStBISuSt.jsp
Subsection List with product pull-down list	STORE_CTLG_SUBSCT_DPDN_ITEMS	Section Contains Navigational Subsections Only	All subsection names, short descriptions, images and product pull-down list.	ibeCCtpChStDdIts.jsp
Subsection List 2	STORE_CTLG_SCTN_BULLET_SUBSCT	Section Contains Navigational Subsections Only	Parent section name, short description plus additional information with Subsection List.	ibeCCtpStNBISuSt.jsp
Product detail	STORE_CTLG_FSUBSCT	Section Contains Featured Subsection	Parent section short description, long description and additional information, with products names, images and descriptions.	ibeCCtpFSubSct.jsp
Product multi-select	STORE_CTLG_FSUBSCT_MULT_2COL	Section Contains Featured Subsection	Parent section short description, long description and additional information with product multi-select.	ibeCCtpFSuStMs2.jsp
Product multi-select with section link	STORE_CTLG_FSUBSCT_MULT_3COL	Section Contains Featured Subsection	Parent section short description, long description and additional information, with product multi-select and section link.	ibeCCtpFSuStMs3.jsp

**Table E-1 Catalog Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Product detail multi-select	STORE_CTLG_LEAF_SCT_ITEMS	Section Contains Products Only	Section short description with product multi-select. Includes product names, small images and descriptions.	ibeCCtpLfStIts.jsp
Product multi-select with drill-down	STORE_CTLG_LEAF_SCT_MULTIPLE	Section Contains Products Only	Section short description, long description and additional information with product multi-select and link to product detail.	ibeCCtpLfStMsL.jsp
Product detail	STORE_CTLG_LEAF_SCT_SINGLE	Section Contains Products Only	Section name, short description and image, with product names, small images and descriptions.	ibeCCtpLeafSctSs.jsp
Product multi-select	STORE_CTLG_LF_SCT_MULT_NOLINKS	Section Contains Products Only	Section short description, long description and additional information with product multi-select.	ibeCCtpLfStMs.jsp
Product pull-down	STORE_CTLG_SCT_DTL_DPDN_ITEMS	Section Contains Products Only	Section name, image, long description and additional information with product pull-down list.	ibeCCtpStMmDtlts.jsp
Multilevel subsection list include	STORE_SECT_MULTILEVEL_SUBSECT_INCL	Component for Sections Contain Navigational Subsections Only	Shows list of multilevel subsections associated with generic content and configurable layout, included in another page	ibeCCtdStMlSubStI.jsp
Section Detail include	STORE_SECT_DETAIL_INCL	Component for Sections Containing Products Only	Shows section detail with generic content and configurable layout, included in another page	ibeCCtdStDetI.jsp

**Table E-1 Catalog Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Product basic information	STORE_CTLG_ITEM_DESC	Product	Product name and description.	ibeCCtdItemDesc.jsp
Product basic information with image	STORE_CTLG_ITEM_DESC_AND_IMG	Product	Product name, description and large image.	ibeCCtdItemDescImg.jsp
Product detail without image	STORE_CTLG_ITEM_DETAILS_NO_IMG	Product	Product name, description, additional information, flexfields and related products.	ibeCCtdItemDtlNoImg.jsp
Product detail with image	STORE_CTLG_ITEM_DETAILS	Product	Product name, description, large image, additional information, flexfields and related products.	ibeCCtdItemDetail.jsp
Product additional information	STORE_CTLG_ITEM_INFO	Product	Product additional information	ibeCCtdItemInfo.jsp
Subsection List (multi-level) include	STORE_CTLG_DLDN_SCT_BULLET_INCL	Component for Sections Contain Navigational Subsections Only	Parent section short description with all subsections and their child section names.	ibeCCtdDdLfStBll.jsp
Subsection List with product detail include	STORE_CTLG_DRILL_LEAF_INCL	Component for Sections Contain Navigational Subsections Only	Parent section name, short description and image, with subsections and their product detail.	ibeCCtdDrillLeaf.jsp
Subsection List include	STORE_CTLG_SCT_BULLET_SUBSCT_INCL	Component for Sections Contain Navigational Subsections Only	Parent section short and long description plus additional information with Subsection List.	ibeCCtdStBISuStl.jsp
Subsection List with product pull-down list include	STORE_CTLG_SUBSCT_DPDN_ITEMS_INCL	Component for Sections Contain Navigational Subsections Only	All subsection names, short descriptions, images and product pull-down list.	ibeCCtdChStDdIts.jsp
Subsection List 2 Include	STORE_CTLG_SCTN_BULLET_SUBSCT_INCL	Component for Sections Contain Navigational Subsections Only	Parent section name, short description plus additional information with Subsection List.	ibeCCtdStNBISuStl.jsp



**Table E-1 Catalog Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Product detail include	STORE_CTLG_ FSUBSCT_INCL	Component for Sections Containing Featured Subsections	Product detail include STORE_CTLG_ FSUBSCT_INCLParent section short description, long description and additional information, with products names, images and descriptions.	ibeCCtdFSubSctI.jsp
Product multi-select include	STORE_CTLG_ FSUBSCT_MULT_ 2COL_INCL	Component for Sections Containing Featured Subsections	Parent section short description, long description and additional information with product multi-select.	ibeCCtdFSuStMs2I.jsp
Product multi-select with section link include	STORE_CTLG_ FSUBSCT_MULT_ 3COL_INCL	Component for Sections Containing Featured Subsections	Parent section short description, long description and additional information, with product multi-select and section link.	ibeCCtdFSuStMs3I.jsp
Product detail multi-select include	STORE_CTLG_LEAF_ SCT_ITEMS_INCL	Component for Sections Containing Products Only	Section short description with product multi-select. Includes product names, small images and descriptions.	ibeCCtdLfStItsI.jsp
Product multi-select with drill-down include	STORE_CTLG_LEAF_ SCT_MULT_INCL	Component for Sections Containing Products Only	Section short description, long description and additional information with product multi-select and link to product detail.	ibeCCtdLfStMsLI.jsp
Product detail include	STORE_CTLG_LEAF_ SCT_SINGLE_INCL	Component for Sections Containing Products Only	Section name, short description and image, with product names, small images and descriptions.	ibeCCtdLeafSctSsI.jsp

**Table E-1 Catalog Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Product multi-select include	STORE_CTLG_LF_SCT_MULT_NOLINKS_INCL	Component for Sections Containing Products Only	Section short description, long description and additional information with product multi-select.	ibeCCtdLfStMsI.jsp
Product pull-down include	STORE_CTLG_SCT_DTL_DPDN_ITEMS_INCL	Component for Sections Containing Products Only	Section name, image, long description and additional information with product pull-down list.	ibeCCtdStMmDtItsI.jsp
Catalog Section Show Media	STORE_CTLG_SHOW_MEDIA	Uncategorized section	Displays common section layout. In the center of the page, embeds logical media passed in as parameter.	ibeCCtpShowMedia.jsp
Catalog Section Forward to Subsection page	STORE_CTLG_FSUBSCT_FWD	Uncategorized section display templates	Display featured sub sections or forward to first navigational child	ibeCCtpFwdSubSct.jsp
Catalog Section Show Media Include	STORE_CTLG_SHOW_MEDIA_INCL	Components for Section	Displays common section layout. In the center of the page, embeds logical media passed in as parameter.	ibeCCtdShowMediaI.jsp
Store Content Center Page	STORE_CTLG_CT_CONTENT	Components for Section	Store Content Center Page	ibeCCtdContentI.jsp
Catalog Section Path	STORE_CTLG_SCT_PATH	Components for Section	Displays path traversed in hierarchy	ibeCCtdSctPath.jsp
Store footer generation template	STORE_CTLG_BOTTOM_PAGE	Common Components	Store footer page	ibeCCtdBottom.jsp
Menu generation template	STORE_CTLG_MENU_PAGE	Common Components	Store menu page	ibeCCtdMenu.jsp

**Table E–1 Catalog Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
Specialty Store Display Page	STORE_CTLG_MSITE_DISPLAY	Common Components	Specialty Store Display Page	ibeCCtdMinisites.jsp
Store display settings	STORE_CTLG_TOP_PAGE	Common Components	Store look and feel display settings page	ibeCCtdTop.jsp
Catalog buy routing	STORE_CTLG_BUY_PROCESS_ROUTE	Catalog Routing	Routing page for Add to Cart, Express Checkout, etc.	ibeCCtpBuyRoute.jsp
Catalog item route	STORE_CTLG_ITM_ROUTE	Catalog Routing	Item display routing	ibeCCtpItmDspRte.jsp
Catalog section display routing	STORE_CTLG_SCT_ROUTE	Catalog Routing	Display routing page	ibeCCtpSctDspRte.jsp
Configurable Layout	STORE_SCT_CONFIGURABLE_LAYOUT	Section Layout	Section Layout with Configurable Bins	ibeCCtdCmnSctLayout.jsp
Catalog bullet sections	STORE_CTLG_BULLET_SCT	Others	List of sections in 2 columns with bullets	ibeCCtdBlts.jsp
Catalog Item Drop Down URL	STORE_CTLG_ITEM_DROP_DOWN_URL	Others	URL for item drop down header link	None
Product name and description Include	STORE_CTLG_LEAF_ITEM_INCL	Others	Product name and description within section page.	ibeCCtdLeafItem.jsp
Catalog item route	STORE_CTLG_ITEM_ROUTE	Catalog Routing	Item display routing	ibeCCtpItmDspRte.jsp

## E.3 Seeded Bin Display Templates

The following table, [Table E–2, "Seeded Bins Display Templates"](#), lists the seeded bins for the Customer UI. Note that this does not include bins seeded for Oracle iSupport or Oracle Partner Management.

**Table E-2 Seeded Bins Display Templates**

Name	Prog. Access Name	Category	Description	Source File
<b>Site Management bins</b>	See also: <a href="#">Section E.19</a> , "Oracle Partner Management Integration Display Templates"	See also: <a href="#">Section E.18</a> , "Oracle iSupport Integration Display Templates"		
Store Group Bin	STORE_GROUP_BIN_IBEWC	Display Templates for section	Displays list of sites assigned to Store group; see <a href="#">Section 8.10.6</a> , "Group Bins"	ibeCAcdGroupSiteBin.jsp?groupCode=STORE
Support Group Bin	SUPPORT_GROUP_BIN_IBEWC	Display Templates for section	Displays list of sites assigned to Support group; <a href="#">Section 8.10.6</a> , "Group Bins"	ibeCAcdGroupSiteBin.jsp?groupCode=SUPPORT
Partner Group Bin	PARTNER_GROUP_BIN_IBEWC	Display Templates for section	Displays list of sites assigned to Partner group; <a href="#">Section 8.10.6</a> , "Group Bins"	ibeCAcdGroupSiteBin.jsp?groupCode=PARTNER
Quick Links Bin	STORE_QUICK_LINKS_BIN_IBEWC	Display Templates for section	Display responsibility menu links	ibeCAcdQuickLinkBin.jsp
<b>Initial pages bins</b>				
Browse Bin	STORE_CTLG_SCT_BROWSE	Components for Section	See <a href="#">Section 6.4.1.1</a> , "Browse Bin"	ibeCCtdSctBrwsBin.jsp
Global Store Bin	STORE_GLOBAL_STORE_BIN	Components for Section	See <a href="#">Section 6.4.1.2</a> , "Global Bin"	ibeCAcdGlobal.jsp
Welcome	STORE_CUST_ACC_WELCOME	Components for Section	See <a href="#">Section 6.4.1.3</a> , "Welcome Bin"	ibeCAcdWelcome.jsp
<b>Section page bins</b>			See <a href="#">Section 8.10.4.1</a> , "Section Page Bins"	
Bin Left 1	STORE_CTLG_BIN_LEFT_1	Components for Section	Bin Left 1	None
Bin Left 2	STORE_CTLG_BIN_LEFT_2	Components for Section	Bin Left 2	None
Bin Left 3	STORE_CTLG_BIN_LEFT_3	Components for Section	Bin Left 3	None

**Table E-2 Seeded Bins Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Bin Left 4	STORE_CTLG_BIN_LEFT_4	Components for Section	Bin Left 4	None
Bin Left 5	STORE_CTLG_BIN_LEFT_5	Components for Section	Bin Left 5	None
Bin Left 6	STORE_CTLG_BIN_LEFT_6	Components for Section	Bin Left 6	None
Bin Left 7	STORE_CTLG_BIN_LEFT_7	Components for Section	Bin Left 7	None
Bin Right 1	STORE_CTLG_BIN_RIGHT_1	Components for Section	Bin Right 1	None
Bin Right 2	STORE_CTLG_BIN_RIGHT_2	Components for Section	Bin Right 2	None
Bin Right 3	STORE_CTLG_BIN_RIGHT_3	Components for Section	Bin Right 3	None
Bin Right 4	STORE_CTLG_BIN_RIGHT_4	Components for Section	Bin Right 4	None
Bin Right 5	STORE_CTLG_BIN_RIGHT_5	Components for Section	Bin Right 5	None
Bin Right 6	STORE_CTLG_BIN_RIGHT_6	Components for Section	Bin Right 6	None
Bin Right 7	STORE_CTLG_BIN_RIGHT_7	Components for Section	Bin Right 7	None
Section Bin Top	STORE_CTLG_SECTION_BIN_TOP	Components for Section	Section Bin Top	None
Section Bin Bottom	STORE_CTLG_SECTION_BIN_BOTTOM	Components for Section	Section Bin Bottom	None
<b>Item detail page bins</b>			See <a href="#">Section 8.10.4.2, "Item Detail Page Bins"</a>	
Item Bin Top	STORE_CTLG_ITEM_BIN_TOP	Product Bin	Item Bin Top	None
Item Bin Bottom	STORE_CTLG_ITEM_BIN_BOTTOM	Product Bin	Item Bin Bottom	None

**Table E–2 Seeded Bins Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Item Bin Left 1	STORE_CTLG_ITEM_ BIN_LEFT_1	Product Bin	Item Bin Left 1	None
Item Bin Left 2	STORE_CTLG_ITEM_ BIN_LEFT_2	Product Bin	Item Bin Left 2	None
Item Bin Left 3	STORE_CTLG_ITEM_ BIN_LEFT_3	Product Bin	Item Bin Left 3	None
Item Bin Left 4	STORE_CTLG_ITEM_ BIN_LEFT_4	Product Bin	Item Bin Left 4	None
Item Bin Left 5	STORE_CTLG_ITEM_ BIN_LEFT_5	Product Bin	Item Bin Left 5	None
Item Bin Left 6	STORE_CTLG_ITEM_ BIN_LEFT_6	Product Bin	Item Bin Left 6	None
Item Bin Left 7	STORE_CTLG_ITEM_ BIN_LEFT_7	Product Bin	Item Bin Left 7	None
Item Bin Right 1	STORE_CTLG_ITEM_ BIN_RIGHT_1	Product Bin	Item Bin Right 1	None
Item Bin Right 2	STORE_CTLG_ITEM_ BIN_RIGHT_2	Product Bin	Item Bin Right 2	None
Item Bin Right 3	STORE_CTLG_ITEM_ BIN_RIGHT_3	Product Bin	Item Bin Right 3	None
Item Bin Right 4	STORE_CTLG_ITEM_ BIN_RIGHT_4	Product Bin	Item Bin Right 4	None
Item Bin Right 5	STORE_CTLG_ITEM_ BIN_RIGHT_5	Product Bin	Item Bin Right 5	None
Item Bin Right 6	STORE_CTLG_ITEM_ BIN_RIGHT_6	Product Bin	Item Bin Right 6	None
Item Bin Right 7	STORE_CTLG_ITEM_ BIN_RIGHT_7	Product Bin	Item Bin Right 7	None
<b>Shopping Cart Bins</b>			See <a href="#">Section 8.10.4.3, "Shopping Cart Page Bins"</a>	
Store Cart Items Bin Bottom	STORE_CART_ ITEMS_BIN_ BOTTOM	Shopping Cart Bin	Bin at the bottom part of the Display Cart page	None

**Table E-2 Seeded Bins Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Store Cart Items Bin Top	STORE_CART_ITEMS_BIN_TOP	Shopping Cart Bin	Bin at the top part of the Display Cart page	None
Left bin on Shopping Cart page	STORE_CART_BIN_LEFT1	Shopping Cart Bin	Left1 bin on Shopping Cart page	None
Left2 bin on Shopping Cart page	STORE_CART_BIN_LEFT2	Shopping Cart Bin	Left2 bin on Shopping Cart page	None
Left3 bin on Shopping Cart page	STORE_CART_BIN_LEFT3	Shopping Cart Bin	Left3 bin on Shopping Cart page	None
Left4 bin on Shopping Cart page	STORE_CART_BIN_LEFT4	Shopping Cart Bin	Left4 bin on Shopping Cart page	None
Left5 bin on Shopping Cart page	STORE_CART_BIN_LEFT5	Shopping Cart Bin	Left5 bin on Shopping Cart page	None
Left6 bin on Shopping Cart page	STORE_CART_BIN_LEFT6	Shopping Cart Bin	Left6 bin on Shopping Cart page	None
Left7 bin on Shopping Cart page	STORE_CART_BIN_LEFT7	Shopping Cart Bin	Left7 bin on Shopping Cart page	None
Right1 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT1	Shopping Cart Bin	Right1 bin on Shopping Cart page.	None
Right2 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT2	Shopping Cart Bin	Right2 bin on Shopping Cart page.	None
Right3 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT3	Shopping Cart Bin	Right3 bin on Shopping Cart page.	None
Right4 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT4	Shopping Cart Bin	Right4 bin on Shopping Cart page.	None

**Table E–2 Seeded Bins Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Right5 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT5	Shopping Cart Bin	Right5 bin on Shopping Cart page.	None
Right6 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT6	Shopping Cart Bin	Right6 bin on Shopping Cart page.	None
Right7 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT7	Shopping Cart Bin	Right7 bin on Shopping Cart page.	None
<b>Registration page bins</b>				
Registration Page 1st Left Bin	STORE_REG_LEFT1_D	Registration Bin	Registration Page 1st Left Bin	None
Registration Page 2nd Left Bin	STORE_REG_LEFT2_D	Registration Bin	Registration Page 2nd Left Bin	None
Registration Page 3rd Left Bin	STORE_REG_LEFT3_D	Registration Bin	Registration Page 3rd Left Bin	None
Registration Page 1st Right Bin	STORE_REG_RIGHT1_D	Registration Bin	Registration Page 1st Right Bin	None
Registration Page 2nd Right Bin	STORE_REG_RIGHT2_D	Registration Bin	Registration Page 2nd Right Bin	None
Registration Page 3rd Right Bin	STORE_REG_RIGHT3_D	Registration Bin	Registration Page 3rd Right Bin	None
Registration Page Bottom Bin	STORE_REG_BOTTOM_D	Registration Bin	Registration Page Bottom Bin	None
Registration Page Top Bin	STORE_REG_TOP_D	Registration Bin	Registration Page Top Bin	None



**Table E–2 Seeded Bins Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
<b>Other bins</b>				
Content Bin Error Template	STORE_CONTENT_BIN_ERR	Common Components	Content Bin Error Template	None
Marketing Posting Bin	STORE_MARKETING_POSTING_BIN	Display Templates for section	Display marketing postings	None

## E.4 Shopping Cart Display Templates

The following table, [Table E–3, "Shopping Cart Display Templates"](#), lists seeded Display Templates for the Customer UI Shopping Cart. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.

**Table E–3 Shopping Cart Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Shopping Carts Total Amounts	STORE_SHOP_CART_SUMMARY	Shopping Cart	This template is used to map cart total amount (tax, S&H, sub-total region) on shopping cart page.	To display shipping/handling and tax in the shopping cart, map to: iberCScdShowCartSummary.jsp (this is the default mapping)  To not display: map to iberCScdShowShopCartSummary.jsp
Shopping Cart Add Item	STORE_CART_ADD_ITEM	Shopping Cart	Add Item to Cart Page	iberCScpAddItem.jsp
B2B Share Cart - Add recipients display	STORE_CART_ADD_RCPT	Shopping Cart	B2B Share Cart - Add recipients display page	iberCScdAddRecipient.s.jsp
B2B Share Cart - Add recipients processing	STORE_CART_ADD_RCPT_P	Shopping Cart	B2B Share Cart - Add recipients processing page	iberCScpAddRecipient.s.jsp

**Table E-3 Shopping Cart Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Show Bundle Details	STORE_CART_BUNDLE_DETAILS	Shopping Cart	Displays model bundle details	ibeCScdBundDet.jsp
Add Bundle or Education	STORE_CART_BUNDL_EDUC_P	Shopping Cart	Adds Bundle, adds Education, or adds Bundle w/ Education	ibeCScpBundEduc.jsp
Configuration Items Details Popup	STORE_CART_CFG_ITEMS	Shopping Cart	Configuration Items Details Popup	ibeCScdCfgItemsPopu p.jsp
Controller page for My Carts/My Quotes pages	STORE_CART_CONTROL	Shopping Cart	Controller page for My Carts/My Quotes pages	ibeCScdListControl.js p
Shop Cart Create Attachments	STORE_CART_CREATE_ATTCH	Shopping Cart	Shop cart create attachments	ibeCScdCreateAttch.js p
Shop Cart Direct Entry	STORE_CART_DIRECT_ENTRY	Shopping Cart	Enter customers' inventory items to cart - direct entry	ibeCScdDirectEntry.js p
Shop Cart Direct Entry Process	STORE_CART_DIRECT_ENTRY_P	Shopping Cart	Processes direct entries	ibeCScpDirectEntry.js p
View Quote Discount Details Display Page	STORE_CART_DISCOUNTS	Shopping Cart	View Quote Discount Details Display Page	ibeCScdDiscounts.jsp
Enter Promotion Code	STORE_CART_ENTER_PROMO	Shopping Cart	Enter Promotion Code page	ibeCScdEnterPromo.js p
Enter Promotion Code	STORE_CART_ENTER_PROMO_P	Shopping Cart	Enter Promotion Code process page	ibeCScpEnterPromo.js p
SHOPPING CART GET SHAREE	STORE_CART_GET_SHAREE	Shopping Cart	Retrieve sharee shopping cart	ibeCScdSharee.jsp
Included warranties display page	STORE_CART_INCSVC_TBL	Shopping Cart	Included warranties display page	ibeCScdIncSvcTbl.jsp

**Table E-3 Shopping Cart Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Shopping cart line tax	STORE_CART_LINE_TAX	Shopping Cart	Shopping cart line tax display	None
Shop Cart List Agreements	STORE_CART_LIST_AGRMNT	Shopping Cart	Shop cart list agreements	ibeCScdListAgrmnt.jsp
Shop Cart List Agreements Process Page	STORE_CART_LIST_AGRMNT_P	Shopping Cart	Shop cart list agreements process page	ibeCScdListAgrmnt.jsp
Shop Cart List Attachments	STORE_CART_LIST_ATTCH	Shopping Cart	Shop cart list attachments	ibeCScdListAttch.jsp
Store Cart List Include	STORE_CART_LIST_INCLUDE	Shopping Cart	This is a dynamic include page which will be used for both Quotes listing and list of Saved Carts page	ibeCScdListInclude.jsp
Share Cart - List recipients	STORE_CART_LIST_RCPTS	Shopping Cart	Share Cart - List recipients include page	ibeCScdListRecipients.jsp
Shopping Cart Sub Menu	STORE_CART_MENU	Shopping Cart	Shopping cart sub menu	ibeCScdMenu.jsp
Shopping Cart Modify	STORE_CART_MODIFY	Shopping Cart	Modify shopping cart	ibeCScdViewA.jsp
Shopping Cart Modify Process	STORE_CART_MODIFY_P	Shopping Cart	Modify shopping cart process page	ibeCScdViewA.jsp
Share Cart - Modify recipients	STORE_CART_MODIFY_RCPTS	Shopping Cart	Share Cart - Modify recipients display page	ibeCScdModifyRecipients.jsp
Share Cart - Modify recipients Processing	STORE_CART_MODIFY_RCPTS_P	Shopping Cart	Share Cart - Modify recipients Processing page	ibeCScdModifyRecipients.jsp
Table of Read-only Promotion Code Display Page	STORE_CART_PROMO_ROTBL	Shopping Cart	Table of Read-only Promotion Code Display Page	ibeCScdPromoROTBl.jsp

**Table E–3 Shopping Cart Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Table of Promotion Code Display Page	STORE_CART_PROMO_TBL	Shopping Cart	Table of Promotion Code Display Page	ibeCScdPromoTbl.jsp
Shopping Cart Save	STORE_CART_SAVE	Shopping Cart	Save shopping cart	ibeCScdSave.jsp
Shopping Cart Save Process	STORE_CART_SAVE_P	Shopping Cart	Save shopping cart process page	ibeCScpSave.jsp
Save Cart Process	STORE_CART_SAVE_CONFIRM	Shopping Cart	Save Cart Process	ibeCScdConfirm.jsp
Save and Confirm	STORE_CART_SAVE_CONFIRM_P	Shopping Cart	Save and Confirm	ibeCScpConfirm.jsp
Support Levels	STORE_CART_SEL_SUPP	Shopping Cart	Support Levels	ibeCScdSupportLvl.jsp
Service details display page	STORE_CART_SERVICE_DETAILS	Shopping Cart	Service details display page	ibeCScdSvcDetails.jsp
Master Control page for b2b and b2c share cart	STORE_CART_SHARE	Shopping Cart	Master control page for both B2B and B2C share cart.	ibeCScdShare.jsp
List of all carts/Quotes Shared by cart owner	STORE_CART_SHAREBYINCLUDE	Shopping Cart	List of all carts/Quotes shared by cart owner	ibeCScdListSharedByUser.jsp
List of all carts/quotes shared to recipient	STORE_CART_SHARETOINCLUDE	Shopping Cart	List of all carts/quotes shared to recipient	ibeCScdListSharedToUser.jsp
B2B Share cart display	STORE_CART_SHARE_B2B	Shopping Cart	B2B Share cart display page	ibeCScdBShare.jsp
B2B Share cart processing	STORE_CART_SHARE_B2B_P	Shopping Cart	B2B Share cart processing page	ibeCScpBShare.jsp
B2C Share cart display	STORE_CART_SHARE_B2C	Shopping Cart	B2C Share cart display page	ibeCScdCShare.jsp
B2C Share cart processing	STORE_CART_SHARE_B2C_P	Shopping Cart	B2C Share cart processing page	ibeCScpCShare.jsp

**Table E-3 Shopping Cart Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Shared cart retrieval by retrieval number page	STORE_CART_SH_RETRIEVE	Shopping Cart	Shared cart retrieval by retrieval number page	ibeCScdShRetrieve.jsp
Shopping Cart View	STORE_CART_VIEW	Shopping Cart	View shopping cart	ibeCScdViewS.jsp
Shopping Cart View Process	STORE_CART_VIEW_P	Shopping Cart	View shopping cart process page	ibeCScpViewS.jsp
View Shopping Cart Line	STORE_CART_VIEW_LINE	Shopping Cart	View Shopping Cart Line	ibeCScdShowCartLines.jsp
Shopping Cart Lists View	STORE_CART_VIEW_LIST	Shopping Cart	View shopping cart lists	ibeCScdListS.jsp
Shopping Cart Lists View Process	STORE_CART_VIEW_LIST_P	Shopping Cart	View shopping cart lists process page	ibeCScpListS.jsp
View Promotion Code	STORE_CART_VIEW_PROMO	Shopping Cart	View promotion code page	ibeCScdViewPromo.jsp
View Promotion Code	STORE_CART_VIEW_PROMO_P	Shopping Cart	View promotion process code page	ibeCScpViewPromo.jsp
Store Cart view Quote	STORE_CART_VIEW_QUOTE	Shopping Cart	Display page for Quote Details	ibeCScdViewQ.jsp
Store Cart view Quote Process	STORE_CART_VIEW_QUOTE_P	Shopping Cart	Processing page for displaying Quote Details	ibeCScpViewQ.jsp
Shared Cart Details	STORE_CART_VIEW_SHARED_CART	Shopping Cart	Shared Cart details for owner and recipients	ibeCScdViewSharedCart.jsp
Shared cart/quotes processing page	STORE_CART_VIEW_SHARED_CART_QUOTE_P	Shopping Cart	Shared cart/quotes processing page	ibeCScpViewSharedCartQuote.jsp
Shared Quote Details	STORE_CART_VIEW_SHARED_QUOTE	Shopping Cart	Shared quote details for owner and recipient	ibeCScdViewSharedQuote.jsp

**Table E-3 Shopping Cart Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
View Shopping Cart Sum	STORE_CART_VIEW_SUM	Shopping Cart	View Shopping Cart Sum	ibeCScdShowCartSummary.jsp
Shopping Cart Warning Display	STORE_CART_WARN	Shopping Cart	Shopping Cart Warning Display	ibeCScdWarn.jsp
Shopping Cart Warning Process	STORE_CART_WARN_P	Shopping Cart	Shopping Cart Warning Process	ibeCScpWarn.jsp
Delete cart warning page	STORE_CART_WARN_DELETE	Shopping Cart	Delete cart warning page	ibeCScdWarnDelete.jsp
Delete cart warning processing page	STORE_CART_WARN_DELETE_P	Shopping Cart	Delete cart warning processing page	ibeCScpWarnDelete.jsp
View current agreement	STORE_AGRMNT_VIEW	Shopping Cart	View current agreement	ibeCScdAgrmntDetail.jsp
Agreement detail view processing	STORE_AGRMNT_VIEW_P	Shopping Cart	Processing page for agreement detail view	ibeCScpAgrmntDetail.jsp
Attachments create form	STORE_ATTACH_CREATE_FORM	Shopping Cart	Attachments create form	ibeCScdCreateAttchForm.jsp
Create attachment process	STORE_ATTACH_CREATE_P	Shopping Cart	Create attachment process	ibeCScpCreateAttch.jsp
Attachments list table	STORE_ATTACH_LIST	Shopping Cart	Attachments list table	ibeCScdListAttchTable.jsp
List attachments process	STORE_ATTACH_P	Shopping Cart	list attachments process	ibeCScpListAttch.jsp
Shop cart direct entry upload	STORE_CART_DIRECT_ENTRY_UPLOAD	Shopping Cart	Upload items to direct entry screen from a .csv file	ibeCScdDirectEntryUpload.jsp
Processing page for direct entry upload	STORE_CART_DIRECT_ENTRY_UPLOAD_P	Shopping Cart	Processing page to upload items from a .csv file	ibeCScpDirectEntryUpload.jsp

## E.5 Service Items Display Templates

The following table, [Table E–4, "Service Items Display Templates"](#), lists seeded Display Templates related to service items support in the Customer UI. See [Section 7.8, "Support for Service Items"](#), for more information.

**Table E–4 Service Items Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Store Cart Change Service	STORE_CART_CHANGE_SVC_P	Shopping Cart	Store Cart Change Service Processing Page	ibeCScpChangeSvc.jsp
Product Detail with Services	STORE_CTLG_SVA_SVC_LIST	Product	Product name, description, image, additional information, flexfields and services	ibeCCndSvaSvcList.jsp
Serviceable Product Detail	STORE_CTLG_SVA_DETAIL	Others	Component page to display the detail of the serviceable product	ibeCCtdSvaItmDtl.jsp
Service Items List	STORE_CTLG_SVC_ITEM_LIST	Components for Section	Component page to display the list of service items with radio buttons	ibeCCtdSvcItmList.jsp
Display Serviceable Config Item	STORE_CART_SVA_CFG_ITEM	Shopping Cart	Display Serviceable Config Item	ibeCScdSvaCfgItem.jsp

## E.6 Descriptive Flexfield Display Templates

The following table, [Table E–5, "Descriptive Flexfield Display Templates"](#), lists seeded Display Templates related to descriptive flexfield support. See [Section D.2, "Descriptive Flexfield Support"](#), for more information.

**Table E–5**    *Descriptive Flexfield Display Templates*

Name	Prog. Access Name	Category	Description	Source File
Additional Information Header Display	STORE_CART_ADDINFO_HEADER	Shopping Cart	Addnl Information Header Display	ibeCScdHdrAdditionalInfo.jsp
Additional Information Header Process	STORE_CART_ADDINFO_HEADER_P	Shopping Cart	Addnl Information Header processing page	ibeCScpHdrAdditionalInfo.jsp
Additional Information Line List Display	STORE_CART_ADDINFO_LINE	Shopping Cart	Addnl Information Line Display	ibeCScdLineAdditionalInfo.jsp
Additional Information Line List processing page	STORE_CART_ADDINFO_LINE_P	Shopping Cart	Addnl Information Line processing page	ibeCScpLineAdditionalInfo.jsp
Additional Information Line Detail Display	STORE_CART_ADDINFO_LINEDETAIL	Shopping Cart	Addnl Info Line Detail Display	ibeCScdItemFFInfoDetail.jsp
Additional Information Line Detail processing page	STORE_CART_ADDINFO_LINEDETAIL_P	Shopping Cart	Addnl Info Line Detail processing page	ibeCScpItemFFInfoDetail.jsp
Additional Information Header Display	STORE_CART_ADDINFO_HEADER	Shopping Cart	Addnl Information Header Display	ibeCScdHdrAdditionalInfo.jsp
Header Level Additional Information in Billing Page	STORE_CHKOUT_ADDINFO_HEADER	Checkout	Header Level Additional Information in Billing Page	ibeCCkdHdrBillPayFlx.jsp

E.7 Shopping List Display Templates

The following table, [Table E–6, "Shopping List Display Templates"](#), lists seeded Display Templates for Shopping Lists. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.



**Table E-6 Shopping List Display Templates**

Name	Prog. Access Name	Category	Description	Source File
SHOP LIST ADD ITEM	STORE_SLIST_ADD_ITEM	Shopping List	Add items to a list	ibeCSldAddItems.jsp
SHOP LIST ADD ITEM PROCESS	STORE_SLIST_ADD_ITEM_P	Shopping List	Processes addition of items to list	ibeCSlpAddItems.jsp
SHOP LIST DISPLAY	STORE_SLIST_DISPLAY	Shopping List	Display shopping list	ibeCSldListDetail.jsp
SHOP LISTS DISPLAY	STORE_SLIST_DISPLAY_LIST	Shopping List	Displays shopping lists	ibeCSldLists.jsp
SHOP LIST PROCESS	STORE_SLIST_DISPLAY_LIST_P	Shopping List	Processes shopping lists	ibeCSlpLists.jsp
SHOP LIST PROCESS	STORE_SLIST_DISPLAY_P	Shopping List	Processes shopping list	ibeCSlpListDetail.jsp
SHOP LIST SAVE	STORE_SLIST_SAVE	Shopping List	Save a shopping list	ibeCSldSave.jsp
SHOP LIST SAVE ACTIVE CART PROCESS	STORE_SLIST_SAVE_ACTIVE_CART	Shopping List	Saving of shopping list to a active cart	ibeCSldSaveActive.jsp
ACTIVE CART PROCESS	STORE_SLIST_SAVE_ACTIVE_CART_P	Shopping List	Process saving of shopping list to a active cart	ibeCSlpSaveActive.jsp
SHOP LIST SAVE PROCESS	STORE_SLIST_SAVE_P	Shopping List	Process saving of shopping list	ibeCSlpSave.jsp
Shopping list warning page	STORE_SLIST_WARN	Shopping List	Warning page for shopping list	ibeCSldListWarn.jsp
Shopping list warning processing page	STORE_SLIST_WARN_P	Shopping List	Warning processing page for shopping list	ibeCSlpListWarn.jsp

## E.8 Orders and Checkout Display Templates

The following table, [Table E-7, "Orders and Checkout Display Templates"](#), lists seeded Display Templates for checkout functionality in the Customer UI. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.

**Table E–7 Orders and Checkout Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Order Confirm	STORE_ORDER_CONFIRM	Others	Confirm a order	ibeocnfm.jsp
Order Confirmation Process	STORE_ORDER_CONFIRM_P	Others	Processes an order confirmation	ibeocnfd.jsp
Order Edit	STORE_ORDER_EDIT	Others	Edit an order	ibeoedit.jsp
Order Edit Process	STORE_ORDER_EDIT_P	Others	Edit an order process page	ibeoedtd.jsp
Order Invoice Header	STORE_ORDER_INVOICE_HEADER	Others	Displays invoice header	ibeobhdr.jsp
Order Invoice Header Process	STORE_ORDER_INVOICE_HEADER_P	Others	Processes invoice header	ibeobhdd.jsp
Order Payment Options	STORE_ORDER_PAYMENT_OPTS_INCLUDE	Others	Include page for displaying payment options	ibeopmto.jsp
Order Ship Header	STORE_ORDER_SHIP_HEADER	Others	Displays the ship header	ibeoshdr.jsp
Order Ship Header Process	STORE_ORDER_SHIP_HEADER_P	Others	Processes a ship header	ibeoshdd.jsp
Order Ship Line	STORE_ORDER_SHIP_LINE	Others	Displays order ship line	ibeoslne.jsp
Order Ship Line Process	STORE_ORDER_SHIP_LINE_P	Others	Processes a ship line	ibeoslnd.jsp
Displays Order Summary	STORE_ORDER_SUMMARY	Others	Displays order summary	ibeosumm.jsp
B2B Bill Payment Display Page	STORE_CHKOUT_B2B_INVOICE_HEADER	Checkout	B2B Bill Payment Display Page	ibeCCkdBHdrBillPay.jsp
B2B Bill Payment Process Page	STORE_CHKOUT_B2B_INVOICE_HEADER_P	Checkout	B2B Bill Payment Process Page	ibeCCkpBHdrBillPay.jsp
Processing Page for Line Billing	STORE_CHKOUT_B2B_INVOICE_LINE_P	Checkout	Processing Page for Line Billing	ibeCCkpBHdrBillPay.jsp

**Table E-7 Orders and Checkout Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
B2B Header Shipment Display Page	STORE_CHKOUT_ B2B_SHIP_HEADER	Checkout	B2B Header Shipment Display Page	ibeCCkdBHdrShip.jsp
B2B Shipment Process Page	STORE_CHKOUT_ B2B_SHIP_HEADER_ P	Checkout	B2B Shipment Process Page	ibeCCkpBHdrShip.jsp
B2C Bill Payment Display Page	STORE_CHKOUT_ B2C_INVOICE_ HEADER	Checkout	B2C Bill Payment Display Page	ibeCCkdCHdrBillPay.jsp
B2C Header Shipment Display Page	STORE_CHKOUT_ B2C_SHIP_HEADER	Checkout	B2C Header Shipment Display Page	ibeCCkdCHdrShip.jsp
Save Commitments	STORE_CHKOUT_ COMMITMENT_ SAVE	Checkout	Saves commitment information into the cart	ibeCCkpSaveCommitments.jsp
Select Commitment	STORE_CHKOUT_ COMMITMENT_ SELECT	Checkout	Shows available commitments and lets user select one	ibeCCkdSelectCommitment.jsp
Show Commitments	STORE_CHKOUT_ COMMITMENT_ SHOW	Checkout	Displays and assigns commitments for cart lines	ibeCCkdShowCommitments.jsp
Contract Checkout	STORE_CHKOUT_ CONTRACT	Checkout	Contract checkout	ibeCCkdCntrct.jsp
Contract Process	STORE_CHKOUT_ CONTRACT_P	Checkout	Contract checkout process	ibeCCkpCntrct.jsp
Contract Change Display	STORE_CHKOUT_ CONTRACT_ CHANGE	Checkout	Contract change	ibeCCkdCntrctChng.jsp
Contract Change Process	STORE_CHKOUT_ CONTRACT_ CHANGE_P	Checkout	Contract change process	ibeCCkpCntrctChng.jsp
Change Contract	STORE_CHKOUT_ CONTRACT_ CHANGE_SENT	Checkout	Contract change	ibeCCkdCntrctSent.jsp
Standard Contract	STORE_CHKOUT_ CONTRACT_STD	Checkout	Standard contract	None
Contract Text	STORE_CHKOUT_ CONTRACT_TEXT	Checkout	Contract text	ibeCCkdCntrctText.jsp

**Table E-7 Orders and Checkout Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Header Display	STORE_CHKOUT_ HEADER_DISPLAY	Checkout	Header display	ibeCCkdHdrDisplay.js p
Invoice Header Display	STORE_CHKOUT_ INVOICE_HEADER	Checkout	Invoice header display	ibeCCkdHdrBillPay.js p
Invoice Header Process	STORE_CHKOUT_ INVOICE_HEADER_ P	Checkout	Invoice header process	ibeCCkpHdrBillPay.js p
Create new address	STORE_CHKOUT_ CREATE_ADDRESS	Checkout	Create new address	ibeCCkdCreateAddr.js p
Process address creation	STORE_CHKOUT_ CREATE_ADDRESS_ P	Checkout	Process address creation	ibeCCkpCreateAddr.js p
Create new contact	STORE_CHKOUT_ CREATE_CONTACT	Checkout	Create new contact	ibeCCkdCreateCntct.j sp
Process contact creation	STORE_CHKOUT_ CREATE_CONTACT_ P	Checkout	Process contact creation	ibeCCkpCreateCntct.j sp
Create new customer	STORE_CHKOUT_ CREATE_ CUSTOMER	Checkout	Create new customer	ibeCCkdCreateCust.js p
Process customer creation	STORE_CHKOUT_ CREATE_ CUSTOMER_P	Checkout	Process customer creation	ibeCCkpCreateCust.js p
STORE_CHKOUT_ LINE_BILL_DTLS	STORE_CHKOUT_ LINE_BILL_DTLS	Checkout	Details Page for Line Billing	ibeCCkdLineBillDetai ls.jsp
STORE_CHKOUT_ LINE_BILL_SUMM	STORE_CHKOUT_ LINE_BILL_SUMM	Checkout	Summary Page for Line Billing	ibeCCkdLineBillSum mary.jsp
Line level cart details	STORE_CHKOUT_ LINE_SHIPBILL_ DTLS	Checkout	Line level shipping & billing details.	ibeCCkdLineShipBill Dtls.jsp
Line Shipments Details Page	STORE_CHKOUT_ LINE_SHIP_DTLS	Checkout	Line Shipments Details Page	ibeCCkdLineShipDeta ils.jsp
Line Shipments Summary Page	STORE_CHKOUT_ LINE_SHIP_SUMM	Checkout	Line Shipments Summary Page	ibeCCkdLineShipSum mary.jsp

**Table E-7 Orders and Checkout Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
STORE_CHKOUT_ LINE_SUMM	STORE_CHKOUT_ LINE_SUMM	Checkout	Common include Page for displaying the lines for Shipping and Billing	ibeCCkdLineSummar y.jsp
STORE_CHKOUT_ PAYMENT_CHANGE	STORE_CHKOUT_ PAYMENT_CHANGE	Checkout	Update payment information	ibeCCkdPmtChng.jsp
STORE_CHKOUT_ PAYMENT_ CHANGE_P	STORE_CHKOUT_ PAYMENT_ CHANGE_P	Checkout	Update payment information processing page	ibeCCkpPmtChng.jsp
Select customer for quote	STORE_CHKOUT_ QUOTE_CUSTOMER	Checkout	Select customer for quote	ibeCCkdQuoteCust.js p
Order Review	STORE_CHKOUT_ REVIEW	Checkout	Order Review	ibeCCkdOrdReview.js p
Order Review Process	STORE_CHKOUT_ REVIEW_P	Checkout	Order Review process page	ibeCCkpOrdReview.js p
Sales Help	STORE_CHKOUT_ SALES_HELP	Checkout	Sales Help	ibeCCkdSalesHelp.jsp
Sale Help Process	STORE_CHKOUT_ SALES_HELP_P	Checkout	Sale Help process page	ibeCCkpSalesHelp.jsp
Address search page	STORE_CHKOUT_ SEARCH_ADDRESS	Checkout	Address search page	ibeCCkdSearchAddr.j sp
Contact search page	STORE_CHKOUT_ SEARCH_CONTACT	Checkout	Contact search page	ibeCCkdSearchCntct.j sp
Customer search page	STORE_CHKOUT_ SEARCH_ CUSTOMER	Checkout	Customer search page	ibeCCkdSearchCust.js p
Shipment Methods	STORE_CHKOUT_ SHIPMENT_ METHODS	Checkout	Shipment Methods	ibeCCkdShipMthds.js p
Ship Header Display	STORE_CHKOUT_ SHIP_HEADER	Checkout	Ship Header Display	ibeCCkdHdrShip.jsp
Ship Header Process	STORE_CHKOUT_ SHIP_HEADER_P	Checkout	Ship Header Process	ibeCCkpHdrShip.jsp
Order Summary	STORE_CHKOUT_ SUMMARY	Checkout	Order summary page	ibeCCkdOrdSummar y.jsp

**Table E–7 Orders and Checkout Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Store Chkout Update Address	STORE_CHKOUT_UPDATE_ADDRESS	Checkout	Update address page	ibeCCkdUpdateAddr.jsp
Store Chkout Update Address Process	STORE_CHKOUT_UPDATE_ADDRESS_P	Checkout	Update address process page	ibeCCkpUpdateAddr.jsp
Address search results	STORE_CHKOUT_VIEW_ADDRESSES	Checkout	Address search results page	ibeCCkdViewAddr.jsp
Process address search	STORE_CHKOUT_VIEW_ADDRESSES_P	Checkout	Address search results process page	ibeCCkpViewAddr.jsp
Contact search results page	STORE_CHKOUT_VIEW_CONTACTS	Checkout	Contact search results page	ibeCCkdViewCntct.jsp
Process contact search	STORE_CHKOUT_VIEW_CONTACTS_P	Checkout	Process contact search page	ibeCCkpViewCntct.jsp
Customer search results page	STORE_CHKOUT_VIEW_CUSTOMERS	Checkout	Customer search results page	ibeCCkdViewCust.jsp
Process customer search	STORE_CHKOUT_VIEW_CUSTOMERS_P	Checkout	Process customer search	ibeCCkpViewCust.jsp
Modify line level shipping details display page	STORE_CART_LINE_SPLIT_DETAILS	Checkout	Modify line level shipping details display page	ibeCCkdLineSplit.jsp
Modify line level shipping details process page	STORE_CART_LINE_SPLIT_DETAILS_P	Checkout	Modify line level shipping details process page	ibeCCkpLineSplit.jsp
Contact Search results list page	STORE_CHKOUT_SRCH_LIST_CONTACTS	Checkout	Contact Search results list page	ibeCCkdSrchListCntct.jsp
Address Search results list page	STORE_CHKOUT_SRCH_LIST_ADDRESSES	Checkout	Address Search results list page	ibeCCkdSrchListAddr.jsp

## E.9 Express Checkout Display Templates

The following table, [Table E–8, "Express Checkout Display Templates"](#), lists seeded Display Templates for Express Checkout. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.

**Table E–8 Express Checkout Display Templates**

Name	Prog. Access Name	Category	Description	Source File
EXPRESS CHK OUT CANCEL	STORE_XPR_ CANCEL	Express Checkout	Cancel a express checkout order	ibeCXpdShowCancel.j sp
EXPRESS CHK OUT ERROR	STORE_XPR_ERROR	Express Checkout	Error during express checkout	ibeCXpdShowError.js p
EXPRESS CHK OUT PROCESS	STORE_XPR_ PROCESS	Express Checkout	Processes the express checkout request	ibeCXppDoButton.jsp
EXPRESS CHK OUT SETTINGS DISPLAY	STORE_XPR_ SETTINGS_DISPLAY	Express Checkout	Displays express checkout settings	ibeCXpdShowSettings .jsp
EXPRESS CHK OUT SETTINGS SAVE	STORE_XPR_ SETTINGS_SAVE	Express Checkout	Save express checkout settings	ibeCXppSaveSettings.j sp
EXPRESS CHK OUT TAG AREA	STORE_XPR_TAG_ AREA	Express Checkout	Displays the area around the checkout tag	ibeCXpdShowTag.jsp
EXPRESS CHK OUT VIEW	STORE_XPR_VIEW	Express Checkout	View a express checkout order	ibeCXpdViewPending .jsp

## E.10 Post Sales Display Templates

The following table, [Table E–9, "Post Sales Display Templates"](#), lists seeded Display Templates for postsales activity. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.

**Table E–9 Post Sales Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Store Cancel Order	STORE_PSI_CANCEL_ORDER_P	Post Sales	Template for cancel order screen	ibeCOtdOrdCancelMain.jsp
Invoice Details Processing Page	STORE_PSI_INVOICE_DETAIL_P	Post Sales	Invoice details processing page	ibeCOtdInvDtlMain.jsp
Invoice payment details	STORE_PSI_INVOICE_PAYMENT_DETAIL_P	Post Sales	Invoice payment details	ibeCOtdInvPmtMain.jsp
Invoice Summary Processing Page	STORE_PSI_INVOICE_SUMMARY_P	Post Sales	Invoice summary processing page	ibeCOtdInvSumMain.jsp
Order Detail Processing Page	STORE_PSI_ORDER_DETAIL_P	Post Sales	Order details processing page	ibeCOtdOrdDtlMain.jsp
Walkin Order Search Display Page	STORE_PSI_W_ORD_SRCH_D	Post Sales	Walkin order search display page	ibeCOtdWOrdSrch.jsp
Walkin Order Search Processing Page	STORE_PSI_W_ORD_SRCH_P	Post Sales	Walkin order search processing page	ibeCOtpWOrdSrch.jsp
Shipping Details Custom Processing	STORE_SHIP_DETAIL_CUSTOM_P	Post Sales	Shipping details custom processing page	ibeCOtpShpDtlCustom.jsp
Order Summary Processing Page	STORE_PSI_ORDER_SUMMARY_P	Post Sales	Order summary processing page	ibeCOtdOrdSumMain.jsp
Payment Details Processing Page	STORE_PSI_PAYMENT_DETAIL_P	Post Sales	Payment details processing page	ibeCOtdPmtDtlMain.jsp
Payment Summary Processing	STORE_PSI_PAYMENT_SUMMARY_P	Post Sales	Payment summary processing page	ibeCOtdPmtSumMain.jsp



**Table E–9 Post Sales Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
Shipment Details Processing	STORE_PSI_SHIPMENT_DETAIL_P	Post Sales	Shipment details processing page	ibeCOtdShpDtlMain.jsp
Shipment Details for Shipment Number	STORE_PSI_DELIVERY_DETAIL_P	Post Sales	Shipment details for Shipment Number	ibeCOtdDlvyDtlMain.jsp
Order Details: Line Billing Details	STORE_PSI_LINE_BILL_DTL_P	Post Sales	Order Details: Line Billing Details	ibeCOtdOrdLineBillDtlMain.jsp
Order Details: Line Shipping Details	STORE_PSI_LINE_SHIP_DTL_P	Post Sales	Order Details: Line Shipping Details	ibeCOtdOrdLineShipDtlMain.jsp

## E.11 Returns Display Templates

The following table, [Table E–10, "Returns Display Templates"](#), lists seeded Display Templates for Returns functionality in the Customer UI. See [Chapter 12, "Implementing Carts and Orders"](#), for more information.

**Table E–10 Returns Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Returns: Search & Select item (Multi Order Flow) Page	STORE_PSI_RETURN_CREATE_MULTILINE_P	Returns	Returns: Search & Select item (Multi Order Flow) Page	ibeCOtdRetCreMultiLineMain.jsp
Returns: Select Items(Single Order Flow) Page	STORE_PSI_RETURN_CREATE_SINGLELINE_P	Returns	Returns: Select Items(Single Order Flow) Page	ibeCOtdRetCreSingleLineMain.jsp
Returns: Confirmation Page	STORE_PSI_RETURN_CONFIRM_P	Returns	Returns: Confirmation Page	ibeCOtdRetConfirmMain.jsp
Returns: Review and Submit Page	STORE_PSI_RETURN_REVIEW_P	Returns	Returns: Review and Submit Page	ibeCOtdRetReviewMain.jsp

**Table E–10   Returns Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Returns: Summary Page	STORE_PSI_RETURN_SUMMARY_P	Returns	Returns: Summary Page	ibeCOtdRetSumMain.jsp
Returns: Details Page	STORE_PSI_RETURN_DETAIL_P	Returns	Returns: Details Page	ibeCOtdRetDtlMain.jsp
Returns: Billing Details Page For B2B customer	STORE_PSI_BILL_DETAIL_P	Returns	Returns: Billing Details Page For B2B customer	ibeCOtdLineBillMain.jsp

## E.12 Available to Promise Display Templates

The following table, [Table E–11, "Available to Promise Display Templates"](#), lists seeded Display Templates for Available to Promise (ATP) functionality in the Customer UI. See [Section 7.4, "Providing Regular Available to Promise \(ATP\)"](#), for more information.

**Table E–11   Available to Promise Display Templates**

Name	Prog. Access Name	Category	Description	Source File
ATP Component page for Customer	STORE_PSI_ATP_C	Shopping Cart	ATP Component page for Customer and Sales Rep	ibeCOtcAtp.jsp
ATP Display Page	STORE_PSI_ATP_D	Shopping Cart	ATP Display Page	ibeCOtdAtp.jsp
ATP Processing Page	STORE_PSI_ATP_P	Shopping Cart	ATP Processing Page	ibeCOtpAtp.jsp
ATP Container page for Sales Person	STORE_PSI_ATP_SP_D	Shopping Cart	ATP container page for sales person	ibeSOtdAtp.jsp

## E.13 User Management Display Templates

The following table, [Table E–12, "User Management Display Templates"](#), lists seeded Display Templates for User Management. See [Chapter 13, "Implementing User Management"](#), for more information.

**Table E–12 User Management Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Role Management Display	STORE_UM_ROLE_MGMT_SUMMARY_D	User Management	Container/Display page for Listing the available Roles	ibeCUmdRoleMgmt.jsp
Role Management Processing	STORE_UM_ROLE_MGMT_SUMMARY_P	User Management	Processing page for Listing the available Roles	ibeCUmpRoleMgmt.jsp
Roles Edit Display	STORE_UM_CREATE_UPDATE_ROLES_D	User Management	Container/Display page for Create/Update Roles	ibeCUmdRoleCrUpd.jsp
Roles Edit Processing	STORE_UM_CREATE_UPDATE_ROLES_P	User Management	Processing page for Create/Update Roles	ibeCUmpRoleCrUpd.jsp
Roles Delete Display	STORE_UM_REMOVE_ROLES_D	User Management	Container/Display page for Remove Roles	ibeCUmdRoleDel.jsp
Contact Management Display	STORE_UM_CONTACT_SUMMARY_D	User Management	Store contact summary page	ibeCUmdContactSummary.jsp
Show Assigned Roles Display	STORE_UM_ROLE_SHOW_D	User Management	Show user roles display page	ibeCUmdShowUserRole.jsp
Show Assigned Roles Processing	STORE_UM_ROLE_SHOW_P	User Management	Show user roles processing page	ibeCUmpShowUserRole.jsp
Assign Roles Display	STORE_UM_ROLE_ASSIGN_D	User Management	Assign user roles display page	ibeCUmdAssignRole.jsp
Assign Roles Processing	STORE_UM_ROLE_ASSIGN_P	User Management	Assign user roles display page	ibeCUmpAssignRole.jsp
Assign Accounts Display	STORE_UM_ACCOUNT_ASSIGN_D	User Management	Assign accounts display page	ibeCUmdAssignAccount.jsp

**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Show Assigned Sites Display	STORE_UM_SITES_SHOW_D	User Management	User sites display page	ibeCUmdShowUserSites.jsp
Pending Approvals Summary Display	STORE_UM_PENDING_APPROVAL_SUMMARY_D	User Management	Container/Display page for Listing the Pending Approval Requests	ibeCUmdPApproval.jsp
Pending Approvals Summary Processing	STORE_UM_PENDING_APPROVAL_SUMMARY_P	User Management	Processing Page for Pending Approvals Listing Page	ibeCUmpPApproval.jsp
Approve/Reject Pending Approvals Display	STORE_UM_PENDING_APPROVAL_DETAILS_D	User Management	Container/Display page for Approve/Reject Requests	ibeCUmdPAppDet.jsp
Approve/Reject Pending Approvals Processing	STORE_UM_PENDING_APPROVAL_DETAILS_P	User Management	Container/Display page for Approve/Reject Requests	ibeCUmpPAppDet.jsp
Assign Sites Display	STORE_UM_SITES_ASSIGN_D	User Management	Assign user sites display page	ibeCUmdAssignSites.jsp
Assign Accounts Processing	STORE_UM_ACCOUNT_ASSIGN_P	User Management	Assign user accounts processing page	ibeCUmpAssignAccount.jsp
Assign Accounts Display	STORE_UM_ACCOUNT_SHOW_D	User Management	User accounts display page	ibeCUmdShowUserAccount.jsp
Remove account warning display	STORE_UM_REM_CUSTACCT_WARN_D	User Management	Remove account warning display page	ibeCUmdRemCustAcctWarn.jsp
Revoke account processing	STORE_UM_REM_CUSTACCT_WARN_P	User Management	Revoke account processing page	ibeCUmpRemCustAcctWarn.jsp
Container Page for Registration	STORE_REG_CONTAINER_D	Registration	Container page that calls other registration pages based on user type	ibeCRgdRegContainer.jsp

**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Registration Page for Usertypes	STORE_REG_REGISTER_D	Registration	Displays available user types	ibeCRgdRegister.jsp
Registration error page	STORE_REG_ERROR_D	Registration	Registration error page used to display error message in user registration process	ibeCRgdError.jsp
Displays user preferences during registration	PARTNER_REG_USER_PREFERENCES_INCL	Registration	Displays user preferences during registration	pvxCRgdUsrPrefIncl.jsp
Individual user creation display page	STORE_REG_B2C_CREATE_D	Registration	Individual user creation display page	ibeCRgdIndividualUser.jsp
Individual user creation processing page	STORE_REG_B2C_CREATE_P	Registration	Individual user creation processing page	ibeCRgpIndividualUser.jsp
Business user creation display page	STORE_REG_BUSINESS_CREATE_D	Registration	Business user registration page	ibeCRgdBusinessCreate.jsp
Primary user creation display page	STORE_REG_PRI_CREATE_D	Registration	Primary business user registration page	ibeCRgdPrimaryCreate.jsp
Primary user creation processing page	STORE_REG_PRI_CREATE_P	Registration	Primary user creation processing page	ibeCRgpPrimaryCreate.jsp
User information like First/Last name and email	STORE_REG_PERSON_INCL_D	Registration	User information like First/Last name and email	ibeCRgdPersonInfoIncl.jsp
Username and Password include page	STORE_REG_USER_PASSWD_D	Registration	Username and Password include page	ibeCRgdUserPasswd.jsp

**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Displays partner types during registration	PARTNER_REG_MEMBER_TYPES_D_INCL	Registration	Displays partner types during registration	pvxCrGdPrtAddnlInfo.jsp
Partner business user creation display page	STORE_REG_BUSPARTNER_CREATE_D	Registration	Partner business user creation display page	ibeCRgdPartnerNonPriCreate.jsp
Partner business user creation processing page	STORE_REG_BUSPARTNER_CREATE_P	Registration	Partner business user creation processing page	ibeCRgpPartnerNonPriCreate.jsp
Partner primary user creation display page	STORE_REG_PARTNER_CREATE_D	Registration	Partner primary user creation display page	ibeCRgdPartnerPriCreate.jsp
Partner primary user creation processing page	STORE_REG_PARTNER_CREATE_P	Registration	Partner primary user creation processing page	ibeCRgpPartnerPriCreate.jsp
Processing page for partner types during registration	PARTNER_REG_MEMBER_TYPES_P	Registration	Processing page for partner types during registration	pvxCrGpPrtAddnlInfo.jsp
View Organization Details	STORE_ORG_ACC_INFO_D	Organization Profile	View Organization Details	ibeCOadOrgDetail.jsp
Update Organization Details	STORE_ORG_ACC_INFO_P	Organization Profile	Update Organization Details	ibeCOapOrgDetail.jsp
View Corporate Address Book	STORE_ORG_ACC_ADDR_BOOK_D	Organization Profile	View Corporate Address Book	ibeCOadOrgAddrBook.jsp

**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
View Administrator s of the company	STORE_ORG_ACC_ ADMIN_D	Organization Profile	View Administrators of the company	ibeCOadAdministrato rs.jsp
Personal Information	STORE_CUST_ACC_ HOME	User Profile	Personal Information display for user profile	ibeCAcdPersonalInfo.j sp
Login	STORE_CUST_ACC_ LOGIN	User Profile	Login display page	ibeCAcdLogin.jsp
Account Authorization	STORE_CUST_ACC_ LOGIN_AUTH	User Profile	Login authorization page	ibeCAcpLogin.jsp
Logout	STORE_CUST_ACC_ LOGOUT	User Profile	Logout page	ibeCAcpLogout.jsp
Password Change	STORE_CUST_ACC_ PASSWORD	User Profile	Password Change page	ibeCAcdPassword.jsp
Order preferences	STORE_CUST_ACC_ PREFS	User Profile	Order preferences	ibeCAcdPreferences.js p
Password Assistance	STORE_CUST_ACC_ PWD_RESET	User Profile	Login and Password Assistance page	ibeCAcdPwdAssist.js p
Password Assistance Processing	STORE_CUST_ACC_ PWD_RESET_P	User Profile	Login and Password Assistance processing page	ibeCAcpPwdAssist.js p
Payment Book processing	STORE_CUST_ PMTBK_DISPLAY	User Profile	Payment Book page	ibeCPmdPmtBook.jsp
Payment Book processing	STORE_CUST_ PMTBK_SAVE	User Profile	Payment Book processing	ibeCPmpPmtBook.jsp
Payment Options Display	STORE_CUST_ PMTBK_PAYMENT_ OPTIONS	User Profile	Payment Options Display	ibeCPmdPmtOptions.j sp
Primary Account Setting	STORE_CUST_PRIM_ ACCT	User Profile	Primary Account Setting	ibeCAcdPrimAcct.jsp
Primary Account Setting Processing	STORE_CUST_PRIM_ ACCT_P	User Profile	Primary Account Setting Processing	ibeCAcpPrimAcct.jsp

**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Password Expired	STORE_CUST_ACC_PWD_EXPIRED	User Profile	Password Expired	ibeCAcdPwdExpired.jsp
Password Expired Processing	STORE_CUST_ACC_PWD_EXPIRED_P	User Profile	Password Expired Processing	ibeCAcpPwdExpired.jsp
Support Preferences	SUPPORT_CUST_ACC_ESUB	User Profile	User Profile: Support Preferences	ibuCSpdesubMain.jsp
Support Preferences Processing	SUPPORT_CUST_ACC_ESUB_P	User Profile	User Profile: Support Preferences Processing	ibuCSppesub.jsp
View User Profile Page	PARTNER_CUST_ACC_VIEW_ATTRIBUTES	User Profile	View user profile	pvxCACdViewAttrMain.jsp
Update User Profile Page	PARTNER_CUST_ACC_EDIT_ATTRIBUTES	User Profile	Update user profile	pvxCACdEditAttrMain.jsp
Sales Preferences	PARTNER_CUST_ACC_SALES	User Profile	Select sales preferences	pvxCACdSalesPrefMain.jsp
View Partner Profile	PARTNER_ORG_ACC_VIEW_ATTRIBUTES	User Profile	View Partner Profile	pvxCOadViewAttrMain.jsp
Update Partner Profile	PARTNER_ORG_ACC_EDIT_ATTRIBUTES	User Profile	Update Partner Profile	pvxCOadEditAttrMain.jsp
View Channel Team for Partner	PARTNER_ORG_ACC_CHANNEL_TEAM	User Profile	View Channel Team for Partner	pvxCOadChnlTeamMain.jsp
View Current Partner Memberships	PARTNER_ORG_ACC_MEMBERSHIPS	User Profile	View Current Partner Memberships	pvxCOadMmbrshipMain.jsp
Administration: View User Profile	PARTNER_UM_VIEW_ATTRIBUTES	User Profile	User Administration: View User Profile	pvxCUmdViewAttrMain.jsp
Administration: Update User Profile	PARTNER_UM_EDIT_ATTRIBUTES	User Profile	User Administration: Update User Profile	pvxCUmdEditAttrMain.jsp



**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
User Management: User Preferences	PARTNER_UM_USER_PREFERENCES_INCL	User Profile	Displays partner user preferences	pvxCUmdUsrPrefIncl.jsp
<b>User/Organization Contact Information</b>				
View Email Include	STORE_CP_VIEW_EMAIL_INCL	Contact Point	View Email Include	ibeCCpdViewEmailIncl.jsp
Email Form	STORE_CP_EMAIL_FRM_INCL	Contact Point	Email Form	ibeCCpdEmailForm.jsp
Edit Email	STORE_CP_EDIT_EMAIL	Contact Point	Edit Email	ibeCCpdEditEmail.jsp
Edit Email Processing Page	STORE_CP_EDIT_EMAIL_P	Contact Point		ibeCCppEditEmail.jsp
Delete Email Processing Page	STORE_CP_DELETE_EMAIL_P	Contact Point	Delete Email Processing Page	ibeCCppDeleteEmail.jsp
View Organization Email	STORE_CP_VIEW_ORG_EMAIL	Contact Point	View Organization Email	ibeCCpdViewEmail.jsp
View User Phone	STORE_CP_VIEW_CUST_PHONE	Contact Point	View User Phone	ibeCCpdViewPhone.jsp
View Organization Phone	STORE_CP_VIEW_ORG_PHONE	Contact Point	View Organization Phone	ibeCCpdViewPhone.jsp
View Phone Include	STORE_CP_VIEW_PHONE_INCL	Contact Point	View Phone Include	ibeCCpdViewPhoneIncl.jsp
Phone Form Include	STORE_CP_PHONE_FRM_INCL	Contact Point	Phone Form Include	ibeCCpdPhoneForm.jsp
Edit Phone	STORE_CP_EDIT_PHONE	Contact Point	Edit Phone	ibeCCpdEditPhone.jsp
Edit Phone Processing Page	STORE_CP_EDIT_PHONE_P	Contact Point	Edit Phone Processing Page	ibeCCppEditPhone.jsp

**Table E-12 User Management Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Delete Phone Processing Page	STORE_CP_DELETE_PHONE_P	Contact Point	Delete Phone Processing Page	ibeCCppDeletePhone.jsp
View Organization Telex	STORE_CP_VIEW_ORG_TELEX	Contact Point	View Organization Telex	ibeCCpdViewTelex.jsp
View Telex Include	STORE_CP_VIEW_TELEX_INCL	Contact Point	View Telex Include	ibeCCpdViewTelexIncl.jsp
Telex Form Include	STORE_CP_TELEX_FRM_INCL	Contact Point	Telex Form Include	ibeCCpdTelexForm.jsp
Edit Telex	STORE_CP_EDIT_TELEX	Contact Point	Edit Telex	ibeCCpdEditTelex.jsp
Edit Telex Processing Page	STORE_CP_EDIT_TELEX_P	Contact Point	Edit Telex Processing Page	ibeCCppEditTelex.jsp
Delete Telex Processing Page	STORE_CP_DELETE_TELEX_P	Contact Point	Delete Telex Processing Page	ibeCCppDeleteTelex.jsp
STORE_ADDRBK_BOOK	STORE_ADDRBK_BOOK	Address Book	Store Address Book	ibeCAddAddrBook.jsp
Store Address Create	STORE_ADDRBK_CREATE	Address Book	Store Address Create	ibeCAdpAddrEdit.jsp
Store Address Delete	STORE_ADDRBK_DELETE	Address Book	Store Address Delete	ibeCAdpAddrDelete.jsp
Store Address Display	STORE_ADDRBK_DISPLAY	Address Book	Store Address Display	ibeCAddAddrDsp1.jsp
Store Address Display Alternate	STORE_ADDRBK_DISPLAY_ALT	Address Book	Store Address Display Alternate	ibeCAddAddrDsp2.jsp
Store Address Display Alternate 2	STORE_ADDRBK_DISPLAY_ALT2	Address Book	Store Address Display Alternate 2	ibeCAddAddrDsp3.jsp
Store Address Display Form	STORE_ADDRBK_DISPLAY_FORM	Address Book	Store Address Display Form	ibeCAddAddrEdit0.jsp

**Table E-12 User Management Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
Store Address Edit	STORE_ADDRBK_EDIT	Address Book	Store Address Edit	ibeCAddAddrEdit.jsp
Store Address Default Form	STORE_ADDRBK_FRM_DEF	Address Book	Store Address Default Form	ibeCAddAddrFrmDef.jsp
Store Address Flexible Address Form	STORE_ADDRBK_FRM_FLEX	Address Book	Store Address Flexible Address Form	ibeCAddAddrFrmFlex.jsp
Store Address Select Create	STORE_ADDRBK_SEL_CREATE	Address Book	Store Address Select Create	ibeCAddAddrSelCreate.jsp

## E.14 Reports and Bins Display Templates

The following table, [Table E-13, "Reports and Bins Display Templates"](#), lists seeded Display Templates for Oracle iStore Reports and Bins. See [Chapter 16, "Implementing Reports"](#), for more information.

**Table E-13 Reports and Bins Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Top Customer Bin Drilldown	BIN_TOP_CUSTOMER_DRILLDOWN	Others	Drilldown for Top Customer Bin	ibemrbosm.jsp
Top Order Bin Drilldown	BIN_TOP_ORDER_DRILLDOWN	Others	Drilldown for Top Order Bin	ibemrbosm.jsp
Top Product Bin Drilldown	BIN_TOP_PRODUCT_DRILLDOWN	Others	Drilldown for Top Product Bin	ibemrbosm.jsp
Summary Bin Drilldown	BIN_SUMMARY_DRILLDOWN		Drilldown For Summary Bin	ibemrbcnr.jsp
Data Out Bins Homepage	IBE_ECR_BIN_HOME		Data Out Bins Homepage	ibemrbhome.jsp

## E.15 Product Search Display Templates

The following table, [Table E-14, "Product Search Display Templates"](#), lists seeded Display Templates for Customer UI Product Search. This functionality is described in [Section 7.9, "Setting up Product Search for the Customer UI"](#).

**Table E–14    Product Search Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Item Search Menu Display Page	STORE_SEARCH_MENU	Product Search	Item Search Menu Display Page	ibeCSrdSrchMenu.jsp
Advanced Search Form	STORE_SEARCH_REFINE	Product Search	Advanced Search Form	ibeCSrdSrchAdvForm.jsp
SEARCH RESULT	STORE_SEARCH_RESULT	Product Search	Shows search results	ibeCSrdSrchResults.jsp

## E.16 Other Display Templates

The following table, [Table E–15, "Other Display Templates"](#), lists other miscellaneous seeded Customer UI Display Templates.

**Table E–15    Other Display Templates**

Name	Prog. Access Name	Category	Description	Source File
About Us	STORE_SP_ABOUT_US	Others	About Us	None
Contact Us	STORE_SP_CONTACT_US	Others	Contact Us	None
Frequently Asked Question	STORE_SP_FAQ	Others	Frequently Asked Questions	None
Partner	STORE_SP_PARTNER	Others	Partner	None
Return Warranty	STORE_SP_RETURN_WARRANTY	Others	Return Warranty	None
Store Welcome	STORE_SP_WELCOME	Others	Store Welcome	None
JTF Style Sheet	JTF_STYLE_SHEET	Others	Oracle CRM Technology Foundation Style Sheet	jtfucss.css
Store Style Sheet	STORE_STYLE_SHEET	Others	Oracle iStore Cascading Style Sheet	jtfucss.css
Store Help Page	STORE_HELP_PAGE	Others	Help page	None

**Table E-15 Other Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Live Help Bin Template	STORE_LIVE_HELP_BIN	Others	Store Help Page	ibeCAcdLiveHelpBin.jsp
Live Help Error Page Template	STORE_LIVE_HELP_ERR_PAGE	Others	Live Help Bin Template	ibeCLhdErrPage.jsp
Live Help PopUp Page Template	STORE_LIVE_HELP_POPUP	Others	Live Help Error Page Template	ibeCLhdPopUp.jsp
Live Help Process Page Template	STORE_LIVE_HELP_PROCESS	Others	Live Help PopUp Page Template	ibeCLhpProcess.jsp
Live Help Wait Page Template	STORE_LIVE_HELP_WAIT_PAGE	Others	Live Help Process Page Template	ibeCLhdWaitPage.jsp
Standard Trailer for all pages	STORE_CUSTOM_BOTTOM	Others	Live Help Wait Page Template	None
Store custom help	STORE_CUSTOM_HELP	Others	Store custom help	None
Content Callback Error Template	STORE_CONTENT_CALL_BACK_ERR	Others	Content Callback Error Template	None
Store Error Message Include Page	STORE_ERR_MSG_INCL	Others	Store Error Message Include Page	ibeCZzdStatus.jsp
Handler for iStore events	STORE_EVENT_HANDLER	Others	Handler for iStore events	None
Table navigation page	STORE_CMN_TABLE_NAVIGATOR	Others	Generic included display page for table navigation	ibeCZzdNavigator.jsp
Generic Message Page	STORE_GENERIC_MESSAGE	Others	Generic Message Page	ibeCZzdMsgBox.jsp

**Table E–15 Other Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
Store generic user fields	STORE_USERINFO_DISPLAY_FORM	Others	Store common user information page	ibeCAcdRegistrationI.jsp
Descriptive FlexField Generic Display	STORE_DESC_FLEXFIELD_DISP	Others	Descriptive FlexField Generic Display	ibeCZzdDFlex.jsp
Descriptive FlexField Generic Processing	STORE_DESC_FLEXFIELD_P	Others	Descriptive FlexField Generic Processing	ibeCZzpDFlex.jsp

## E.17 Oracle Configurator and BOM Integration Display Templates

The following table, [Table E–16, "Oracle Configurator and BOM Integration Display Templates"](#), lists seeded Display Templates for the Oracle Configurator and Oracle Bills of Material (BOM) integration in the Customer UI. See [Chapter 23, "Integrating Oracle iStore with Oracle Configurator"](#), for information about this functionality.

**Table E–16 Oracle Configurator and BOM Integration Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Branch or route upon return from Configurator	STORE_CFG_BRANCH	Configurator	Main logic page to route the return to iStore from Configurator	ibeCFgpBranch.jsp
Display Configured item	STORE_CFG_DISPLAY	Configurator	Display a Configured item in an HTML table cell	ibeCFgdDisplay.jsp
Set outer frame set to run Configurator	STORE_CFG_FRAME_SRCS	Configurator	Establishes the outer frame set for Configurator DHTML UI to run in.	ibeCFgdFrameSources.jsp
Starts the launching of the Configurator from iStore	STORE_CFG_LAUNCH	Configurator	Prepares parameters to launch the Configurator from iStore.	ibeCFgpLaunch.jsp

**Table E–16 Oracle Configurator and BOM Integration Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
Return page for Configurator to post to	STORE_CFG_REDIRECT	Configurator	Initial page for Configurator servlet to post to in returning to iStore and regaining iStore context.	ibeCFgpRedirect.jsp
Display Model Item Detail in Popup	STORE_CART_CFG_ITEMS_ACTUAL	Shopping Cart	Display Model Item Detail in Popup	ibeCScdMdlItemPopu p.jsp
Display Model Item Lines	STORE_CART_MDL_ITEM_LINES	Shopping Cart	Display Model Item Lines	ibeCScdMdlItemLines.jsp
Display Model Item Detail	STORE_CART_MDL_ITEM_DETAIL	Shopping Cart	Display Model Item Detail	ibeCScdMdlItemDetail.jsp
Model Item Detail Processing Page	STORE_CART_MDL_ITEM_DETAIL_P	Shopping Cart	Model Item Detail Processing Page	ibeCScpMdlItemDetail.jsp

## E.18 Oracle iSupport Integration Display Templates

The following table, [Table E–17, "Oracle iSupport Integration Display Templates"](#), lists seeded Display Templates for Oracle iSupport integration. See [Chapter 25, "Integrating Oracle iStore with Oracle iSupport"](#), for more information.

**Table E–17 Oracle iSupport Integration Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Alerts Bin	SUPPORT_ALERTS_BIN_IBEWC	Display Templates for section	Display alert messages to users	ibuCSpdAlertsBin.jsp
Ask Support Bin	SUPPORT_ASK_SUPPORT_BIN_IBEWC	Display Templates for section	Provide call agent functionality to get support	ibuCSpdCallMeBin.jsp
Search Solution Bin	SUPPORT_SEARCH_SOLUTION_BIN_IBEWC	Display Templates for section	Search for a solution	ibuCSpdSolveProbBin.jsp
Technical Library Bin	SUPPORT_TECH_LIB_BIN_IBEWC	Display Templates for section	Publish documents to user from MES	ibuCSpdTechLibBin.jsp

## E.19 Oracle Partner Management Integration Display Templates

The following table, [Table E-18, "Oracle Partner Management Integration Display Templates"](#), lists seeded Display Templates for Oracle Partner Relationship Management integration. See [Chapter 27, "Integrating Oracle iStore with Oracle Partner Management"](#), for more information.

**Table E-18 Oracle Partner Management Integration Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Enroll Programs Bin	PARTNER_ENROLL_PRGMS_BIN_IBEWC	Display Templates for section	Display list of programs available for enrollment	pvxCPvdPrgmNewBin.jsp
Enrollment Left 1 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_1	Display Templates for section	This bin is displayed at the top on the left hand side	None
Enrollment Left 2 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_2	Display Templates for section	This bin is displayed on the left hand side	None
Enrollment Left 3 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_3	Display Templates for section	This bin is displayed on the left hand side	None
Enrollment Left 4 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_4	Display Templates for section	This bin is displayed at the bottom on the left hand side	None
Enrollment Right 1 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_1	Display Templates for section	This bin is displayed at the top on the right hand side	None
Enrollment Right 2 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_2	Display Templates for section	This bin is displayed on the right hand side	None
Enrollment Right 3 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_3	Display Templates for section	This bin is displayed on the right hand side	None
Enrollment Right 4 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_4	Display Templates for section	This bin is displayed at the bottom on the right hand side	None
Manage My Partners Bin	PARTNER_MANAGE_PARTNERS_BIN_IBEWC	Display Templates for section	Allow VADs to manage partners	pvxCPvdMngPrtnrBin.jsp
New Offered Opportunities Bin	PARTNER_OFFERED_OPTN_BIN_IBEWC	Display Templates for section	Display list of new offered opportunities to partners	pvxCPvdMyOffrdOpBin.jsp



**Table E-18 Oracle Partner Management Integration Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Renew Programs Bin	PARTNER_RENEW_PRGMS_BIN_IBEWC	Display Templates for section	Display list of programs available for renewals	pvxCPvdPrgmRenewBin.jsp
Upgrade Programs Bin	PARTNER_UPGRADE_PRGMS_BIN_IBEWC	Display Templates for section	Display list of programs available for upgrade	pvxCPvdPrgmUpgradeBin.jsp
Program Overview Page	PARTNER_PRGM_ENRL_OVERVIEW	Others	Displays the partner program overview page	pvxCPvpPrgmDescMain.jsp
Program Questionnaire Page	PARTNER_PRGM_ENRL_QSNR	Others	Displays the partner program questionnaire page	pvxCPvpEnrlQsnrMain.jsp
Program Questionnaire Summary Page	PARTNER_PRGM_ENRL_QSNR_SUMMARY	Others	Displays the partner program questionnaire summary page	pvxCPvpEnrlQSmryMain.jsp
Program Contract Page	PARTNER_PRGM_ENRL_CONTRACT	Others	Displays the partner program contract page	pvxCPvpEnrlCntrtMain.jsp
Program Billing Information Page	PARTNER_PRGM_ENRL_PMNT_BILLING	Others	Displays the partner program billing information Page	pvxCPvpEnrlPBillMain.jsp
Program Payment Information Page	PARTNER_PRGM_ENRL_PMNT_INFO	Others	Displays the partner program payment information page	pvxCPvpEnrlPInfoMain.jsp
Program Payment Confirmation Page	PARTNER_PRGM_ENRL_PMNT_CONFIRM	Others	Displays the partner program payment confirmation page	pvxCPvpEnrlPCnfmMain.jsp
Program Enrollment Confirmation Page	PARTNER_PRGM_ENRL_THANKYOU	Others	Displays the partner program enrollment confirmation page	pvxCPvpEnrlThankMain.jsp

**Table E-18 Oracle Partner Management Integration Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Partner Program Enrollment Common Layout	PARTNER_PRGM_ENRL_COMMON_LAYOUT	Others	Partner Program Enrollment Common Layout	pvxCPvdEnrlCmnDpMain.jsp
Program Overview Include	PARTNER_PRGM_ENRL_OVERVIEW_INCL	Others	Include page to display program overview	pvxCPvdPrgmDescIncl.jsp
Program Questionnaire Include	PARTNER_PRGM_ENRL_QSNR_INCL	Others	Include page to display program questionnaire	pvxCPvdEnrlQsnrIncl.jsp
Program Questionnaire Summary Include	PARTNER_PRGM_ENRL_QSNR_SUMMARY_INCL	Others	Include page to display program questionnaire summary	pvxCPvdEnrlQSmryIncl.jsp
Program Contracts Include	PARTNER_PRGM_ENRL_CONTRACT_INCL	Others	Include page to display program contracts	pvxCPvdEnrlCntrtlIncl.jsp
Program Payment Billing Information Include	PARTNER_PRGM_ENRL_PMNT_BILLING_INCL	Others	Include page to display billing information	pvxCPvdEnrlCntrtlIncl.jsp
Program Payment Information Include	PARTNER_PRGM_ENRL_PMNT_INFO_INCL	Others	Include page to display program payment information	pvxCPvdEnrlPBillIncl.jsp
Program Payment Confirmation Include	PARTNER_PRGM_ENRL_PMNT_CONFIRM_INCL	Others	Include page to display program payment confirmation	pvxCPvdEnrlPInfoIncl.jsp
Program Enrollment Confirmation Include	PARTNER_PRGM_ENRL_THANKYOU_INCL	Others	Include page to display program enrollment confirmation	pvxCPvdEnrlThankIncl.jsp
Enrollment Left 1 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_1	Others	This bin is displayed at the top on the left hand side	None

**Table E-18 Oracle Partner Management Integration Display Templates**

Name	Prog. Access Name	Category	Description	Source File
Enrollment Left 2 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_2	Others	This bin is displayed on the left hand side	None
Enrollment Left 3 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_3	Others	This bin is displayed on the left hand side	None
Enrollment Left 4 Bin	PARTNER_PRGM_ENRL_BIN_LEFT_4	Others	This bin is displayed at the bottom on the left hand side	None
Enrollment Center 1	PARTNER_PRGM_ENRL_CENTER_1	Others	This bin is displayed at the top in the center of the page	None
Enrollment Center 2	PARTNER_PRGM_ENRL_CENTER_2	Others	This bin is displayed in the center of the page	None
Enrollment Center 4	PARTNER_PRGM_ENRL_CENTER_4	Others	This bin is displayed at the bottom in the center of the page	None
Enrollment Right 1 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_1	Others	This bin is displayed at the top on the right hand side	None
Enrollment Right 2 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_2	Others	This bin is displayed on the right hand side	None
Enrollment Right 3 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_3	Others	This bin is displayed on the right hand side	None
Enrollment Right 4 Bin	PARTNER_PRGM_ENRL_BIN_RIGHT_4	Others	This bin is displayed at the bottom on the right hand side	None

## E.20 Oracle Quoting Integration Display Templates

The following table, [Table E-19, "Oracle Quoting Integration Display Templates"](#), lists seeded Display Templates related to Customer UI Quotes. See [Chapter 12, "Implementing Carts and Orders"](#), [Chapter 28, "Integrating Oracle iStore with Oracle Quoting"](#), for more information.

**Table E–19 Oracle Quoting Integration Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
SalesRep Add Item Process Page	STORE_QUOTE_ADD_ITEM	Others	SalesRep Add Item Process Page	ibeSQtpAddItem.jsp
Add services to a quote display page	STORE_QUOTE_ADD_SERVICES	Others	Add services to a quote display page	ibeSQtdAddServices.jsp
Add services to a quote component page	STORE_QUOTE_ADD_SERVICES_C	Others	Add services to a quote component page	ibeSQtcAddServices.jsp
Add services to a quote process page	STORE_QUOTE_ADD_SERVICES_P	Others	Add services to a quote process page	ibeSQtpAddServices.jsp
Advanced Search component page for quoting	STORE_QUOTE_ADV_SRCH_C	Others	Advanced Search component page for quoting	ibeSQtcAdvItemSrch.jsp
Advanced Search display page for quoting	STORE_QUOTE_ADV_SRCH_D	Others	Advanced Search display page for quoting	ibeSQtdAdvItemSrch.jsp
Append Quote Display Page	STORE_QUOTE_APPEND	Others	Append Quote Display Page	ibeSQtdAppend.jsp
Append Quote Component Page	STORE_QUOTE_APPEND_C	Others	Append Quote Component Page	ibeSQtcAppend.jsp
List More Versions for Appending Display Page	STORE_QUOTE_APPEND_MORE	Others	List More Versions for Appending Display Page	ibeSQtdApndMore.jsp
List More Versions for Appending Component Page	STORE_QUOTE_APPEND_MORE_C	Others	List More Versions for Appending Component Page	ibeSQtcApndMore.jsp
List More Versions for Appending Process Page	STORE_QUOTE_APPEND_MORE_P	Others	List More Versions for Appending Process Page	ibeSQtpApndMore.jsp
Append Quote Process Page	STORE_QUOTE_APPEND_P	Others	Append Quote Process Page	ibeSQtpAppend.jsp
Add services to a configuration display page	STORE_QUOTE_CFG_ADD_SVC	Others	Add services to a configuration display page	ibeSQtdCfgAddSvc.jsp
Add services to a configuration component page	STORE_QUOTE_CFG_ADD_SVC_C	Others	Add services to a configuration component page	ibeSQtcCfgAddSvc.jsp

**Table E-19 Oracle Quoting Integration Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Add services to a configuration process page	STORE_QUOTE_CFG_ADD_SVC_P	Others	Add services to a configuration process page	ibeSQtpCfgAddSvc.jsp
Copy Quote Display Page	STORE_QUOTE_COPY	Others	Copy Quote Display Page	ibeSQtdCopy.jsp
Copy Quote Component Page	STORE_QUOTE_COPY_C	Others	Copy Quote Component Page	ibeSQtcCopy.jsp
Copy Quote Options Display Page	STORE_QUOTE_COPY_OPT	Others	Copy Quote Options Display Page	ibeSQtdCopyOpt.jsp
Copy Quote Options Component Page	STORE_QUOTE_COPY_OPT_C	Others	Copy Quote Options Component Page	ibeSQtcCopyOpt.jsp
Copy Quote Process Page	STORE_QUOTE_COPY_P	Others	Copy Quote Process Page	ibeSQtpCopy.jsp
Create Quote Display Page	STORE_QUOTE_CREATE	Others	Create Quote Display Page	ibeSQtdCreate.jsp
Quote Create Attachments	STORE_QUOTE_CREATE_ATTCH	Others	Quote Create Attachments	ibeSQtdCreateAttch.jsp
Quote Create Attachment Component Page	STORE_QUOTE_CREATE_ATTCH_C	Others	Quote Create Attachment Component Page	ibeSQtcCreateAttch.jsp
Create Quote Process Page	STORE_QUOTE_CREATE_P	Others	Create Quote Process Page	ibeSQtpCreate.jsp
Enter Promotion Code Display Page	STORE_QUOTE_ENTER_PROMO	Others	Enter Promotion Code Display Page	ibeSQtdEnterPromo.jsp
Enter Promotion Code Component Page	STORE_QUOTE_ENTER_PROMO_C	Others	Enter Promotion Code Component Page	ibeSQtcEnterPromo.jsp
View Quote Header Details Display Page	STORE_QUOTE_HEADER	Others	View Quote Header Details Display Page	ibeSQtdHeader.jsp
Increase Quote Version Display Page	STORE_QUOTE_INC_VER	Others	Increase Quote Version Display Page	ibeSQtdIncVer.jsp
Increase Quote Version Component Page	STORE_QUOTE_INC_VER_C	Others	Increase Quote Version Component Page	ibeSQtcIncVer.jsp
View Quote Item Details Display Page	STORE_QUOTE_ITEMS	Others	View Quote Item Details Display Page	ibeSQtdItems.jsp

**Table E–19 Oracle Quoting Integration Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Quote Line Details Component Page	STORE_QUOTE_ITEMS_C	Others	Quote Line Details Component Page	ibeSQtcItems.jsp
View Quote Item Details Process Page	STORE_QUOTE_ITEMS_P	Others	View Quote Item Details Process Page	ibeSQtpItems.jsp
Quote Item Search Display Page	STORE_QUOTE_ITEM_SRCH	Others	Quote Item Search Display Page	ibeSQtdItemSrch.jsp
Quote Item Search Component Page	STORE_QUOTE_ITEM_SRCH_C	Others	Quote Item Search Component Page	ibeSQtcItemSrch.jsp
List Quotes Display Page	STORE_QUOTE_LIST	Others	List Quotes Display Page	ibeSQtdList.jsp
Quote List Agreements	STORE_QUOTE_LIST_AGRMNT	Others	Quote List Agreements	ibeSQtdListAgrmnt.jsp
Quote List Agreements Component Page	STORE_QUOTE_LIST_AGRMNT_C	Others	Quote List Agreements Component Page	ibeSQtcListAgrmnt.jsp
Quote List Attachments	STORE_QUOTE_LIST_ATTCH	Others	Quote List Attachments	ibeSQtdListAttch.jsp
Quote List Attachments Component Page	STORE_QUOTE_LIST_ATTCH_C	Others	Quote List Attachments Component Page	ibeSQtcListAttch.jsp
List Quotes Component Page	STORE_QUOTE_LIST_C	Others	List Quotes Component Page	ibeSQtcList.jsp
List More Versions Display Page	STORE_QUOTE_LIST_MORE	Others	List More Versions Display Page	ibeSQtdListMore.jsp
List More Versions Component Page	STORE_QUOTE_LIST_MORE_C	Others	List More Versions Component Page	ibeSQtcListMore.jsp
List More Versions Process Page	STORE_QUOTE_LIST_MORE_P	Others	List More Versions Process Page	ibeSQtpListMore.jsp
List Quotes Process Page	STORE_QUOTE_LIST_P	Others	List Quotes Process Page	ibeSQtpList.jsp
Quote Detail Main Display Page	STORE_QUOTE_MAIN	Others	Quote Detail Main Display Page	ibeSQtdMain.jsp
Quote Detail Main Component Page	STORE_QUOTE_MAIN_C	Others	Quote Detail Main Component Page	ibeSQtcMain.jsp

**Table E-19 Oracle Quoting Integration Display Templates (Cont.)**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Quote Detail Main Process Page	STORE_QUOTE_MAIN_P	Others	Quote Detail Main Process Page	ibeSQtpMain.jsp
Quoting Submenu Display Page	STORE_QUOTE_MENU	Others	Quoting Submenu Display Page	ibeSQtdMenu.jsp
Quote header info for listMore display page	STORE_QUOTE_MORE_HEADER	Others	Quote header info for listMore display page	ibeSQtdMoreHdr.jsp
Search parameters for listMore display page	STORE_QUOTE_MORE_SRCH	Others	Search parameters for listMore display page	ibeSQtdMoreSrch.jsp
Quote Note Container Page	STORE_QUOTE_NOTES	Others	Quote Note Container Page	ibeSQtdNotes.jsp
Quote Detail Print Display Page	STORE_QUOTE_PRINT	Others	Quote Detail Print Display Page	ibeSQtdPrint.jsp
Quote Sales Credits Container Page	STORE_QUOTE_SALES_CREDITS	Others	Quote Sales Credits Container Page	ibeSQtdSalesCredits.jsp
Quote Sales Credits Component Page	STORE_QUOTE_SALES_CREDITS_C	Others	Quote Sales Credits Component Page	ibeSQtcSalesCredits.jsp
View Quote Shipment Display Page	STORE_QUOTE_SHIP_HEADER	Others	View Quote Shipment Display Page	ibeSQtdHdrShip.jsp
View Quote Shipment Process Page	STORE_QUOTE_SHIP_HEADER_P	Others	View Quote Shipment Process Page	ibeSQtpHdrShip.jsp
Sales Credits Table Display Page	STORE_QUOTE_SLS_CREDITS_TBL	Others	Sales Credits Table Display Page	ibeSQtdSlsCrTable.jsp
Sales Credits Table Processing Page	STORE_QUOTE_SLS_CREDITS_TBL_P	Others	Sales Credits Table Processing Page	ibeSQtpSlsCrTable.jsp
Enter Search Parameters Display Page	STORE_QUOTE_SRCH	Others	Enter Search Parameters Display Page	ibeSQtdSrch.jsp
Salesrep Search Page	STORE_QUOTE_SRP_SEARCH	Others	Salesrep Search Page	ibeSQtdSrpSearch.jsp
Salesrep Search Results Container Page	STORE_QUOTE_SRP_SEARCH_RSLTS	Others	Salesrep Search Results Container Page	ibeSQtdSrpSrchRsIts.jsp
Salesrep Search Results Component Page	STORE_QUOTE_SRP_SEARCH_RSLTS_C	Others	Salesrep Search Results Component Page	ibeSQtcSrpSrchRsIts.jsp

**Table E–19 Oracle Quoting Integration Display Templates (Cont.)**

Name	Prog. Access Name	Category	Description	Source File
Salesrep Search Results Processing Page	STORE_QUOTE_SRP_SEARCH_RSLTS_P	Others	Salesrep Search Results Processing Page	ibeSQtpSrpSrchRsIts.jsp
Quote Task Container Page	STORE_QUOTE_TASKS	Others	Quote Task Container Page	ibeSQtdTasks.jsp
Table of Quotes Display Page	STORE_QUOTE_TBL	Others	Table of Quotes Display Page	ibeSQtdTbl.jsp
View Quote Version History Display Page	STORE_QUOTE_VERSIONS	Others	View Quote Version History Display Page	ibeSQtdVersions.jsp
Quote Version History Component Page	STORE_QUOTE_VERSIONS_C	Others	Quote Version History Component Page	ibeSQtcVersions.jsp
View Quote Version History Process Page	STORE_QUOTE_VERSIONS_P	Others	View Quote Version History Process Page	ibeSQtpVersions.jsp
Table of Quote Versions Display Page	STORE_QUOTE_VER_TBL	Others	Table of Quote Versions Display Page	ibeSQtdVerTbl.jsp
Review Promotion Code Display Page	STORE_QUOTE_VIEW_PROMO	Others	Review Promotion Code Display Page	ibeSQtdViewPromo.jsp
Review Promotion Code Component Page	STORE_QUOTE_VIEW_PROMO_C	Others	Review Promotion Code Component Page	ibeSQtcViewPromo.jsp
STORE_CART_LIST_QUOTES	STORE_CART_LIST_QUOTES	Others	This is a container page to display Quotes listing	ibeCScdListQ.jsp
STORE_CART_LIST_QUOTES_P	STORE_CART_LIST_QUOTES_P	Others	Processing page for 'Quote Listing'	ibeCScpListQ.jsp

## E.21 Non-Current Display Templates

The following table, [Table E–20, "Non-Current Display Templates"](#), lists seeded Customer UI Display Templates from previous releases. These templates are not currently used, but are preserved for backward-compatibility purposes.



**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Catalog Browse	STORE_CTLG_ BROWSE	Others	Catalog - Hierarchy Browse - 11.5.4 Maintenance Pack	ibecbrws.jsp
Catalog Buy Routing	STORE_CTLG_BUY_ ROUTE	Others	Catalog - Buy Routing - 11.5.4 Maintenance Pack	ibecbrte.jsp
Catalog Display Routing	STORE_CTLG_ DISPLAY_ROUTE	Others	Catalog Display Routing - 11.5.4 Maintenance Pack	ibecdrte.jsp
Catalog Display Routing Included	STORE_CTLG_ DISPLAY_ROUTE_ INCLUDED	Others	Catalog - display routing page included within another page - 11.5.4 Maintenance Pack	ibecdrti.jsp
Catalog Drill Down Leaf Section	STORE_CTLG_ DRILL_DOWN_LEAF	Others	Catalog - drill down to the leaf sections - 11.5.4 Maintenance Pack	ibecddlf.jsp
Catalog Drill Down Leaf Section Included	STORE_CTLG_ DRILL_DOWN_ LEAF_INCLUDED	Others	Catalog - drill down to the leaf sections included in another page - 11.5.4 Maintenance Pack	ibecdli.jsp
Catalog Featured Product	STORE_CTLG_ FEATURED_ITEM	Others	Catalog - featured product - 11.5.5 Maintenance Pack	ibecfitm.jsp
Catalog Featured Section	STORE_CTLG_ FEATURED_ SECTION	Others	Catalog - featured section - 11.5.3 Maintenance Pack	ibecfsct.jsp
Catalog Featured Section Included	STORE_CTLG_ FEATURED_ SECTION_ INCLUDED	Others	Catalog - featured section included within another page - 11.5.5 Maintenance Pack	ibecfsti.jsp
Catalog Product Detail	STORE_CTLG_ITEM_ DETAIL	Others	Catalog - product detail - 11.5.4 Maintenance Pack	ibecitmd.jsp
Catalog Item Relationship	STORE_CTLG_ITEM_ RELATION	Others	Catalog - Item Relationship - 11.5.4 Maintenance Pack	ibecirel.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Catalog Item Routing	STORE_CTLG_ITEM_ROUTE	Others	Catalog - Item Routing - 11.5.4 Maintenance Pack	ibecirte.jsp
Catalog Leaf Product Single	STORE_CTLG_LEAF_ITEM	Others	Catalog - leaf product allowing to add single product to the shopping cart - 11.5.4 Maintenance Pack	ibeclitm.jsp
Catalog Path	STORE_CTLG_PATH	Others	Catalog - Path - 11.5.4 Maintenance Pack	ibecpath.jsp
Catalog Leaf Section Multiple	STORE_CTLG_LEAF_SECTION_MULTIPLE	Others	Catalog - leaf section allowing to add multiple products to the shopping cart - 11.5.4 Maintenance Pack	ibeclfsm.jsp
Catalog Leaf Section Single	STORE_CTLG_LEAF_SECTION_SINGLE	Others	Catalog - leaf section allowing to add single product to the shopping cart - 11.5.4 Maintenance Pack	ibeclfss.jsp
Catalog Leaf Section Multiple Included	STORE_CTLG_LEAF_SECT_MULTIPLE_INCLUDED	Others	Catalog - leaf section allowing to add multiple products to the shopping cart included in another page - 11.5.5 Maintenance Pack	ibeclsmi.jsp
Catalog Leaf Section Single Included	STORE_CTLG_LEAF_SECT_SINGLE_INCLUDED	Others	Catalog - leaf section allowing to add single product to the shopping cart included in another page - 11.5.4 Maintenance Pack	ibeclsi.jsp
SHOP LIST ADD ITEM	STORE_SHLIST_ADD_ITEM	Others	Add items to a list - pre-R11.5.4	ibeslald.jsp
SHOP LIST ADD ITEM PROCESS	STORE_SHLIST_ADD_ITEM_P	Others	Processes addition of items to list - pre-R11.5.4	ibeslalp.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
SHOP LIST DISPLAY	STORE_SHLIST_DISPLAY	Others	Display shopping list - pre-R11.5.4	ibesldld.jsp
SHOP LISTS DISPLAY	STORE_SHLIST_DISPLAY_LIST	Others	Displays shopping lists - pre-R11.5.4	ibesldlh.jsp
SHOP LIST PROCESS	STORE_SHLIST_DISPLAY_LIST_P	Others	Processes shopping lists - pre-R11.5.4	ibesldhp.jsp
SHOP LIST PROCESS	STORE_SHLIST_DISPLAY_P	Others	Processes shopping list - pre-R11.5.4	ibesldlp.jsp
SHOP LIST ERROR	STORE_SHLIST_ERROR	Others	Shows shopping list errors - pre-R11.5.4	ibeslwar.jsp
SHOP LIST SAVE	STORE_SHLIST_SAVE	Others	Save a shopping list - pre-R11.5.4	ibeslcla.jsp
SHOP LIST SAVE PROCESS	STORE_SHLIST_SAVE_P	Others	Process saving of shopping list - pre-R11.5.4	ibeslclp.jsp
POST SALES ADDRESS DISPLAY	STORE_PSI_ADDRESS_DISPLAY	Others	Address display page - pre R11.5.4	ibeiaaddr.jsp
INVOICE DETAIL	STORE_PSI_INVOICE_DETAIL	Others	Invoice details - pre R11.5.4	ibeiinvd.jsp
INVOICE PAYMENT DETAIL	STORE_PSI_INVOICE_PAYMENT_DETAIL	Others	Invoice payment details - pre R11.5.4	ibeiivpd.jsp
INVOICE SUMMARY	STORE_PSI_INVOICE_SUMMARY	Others	Invoice summary - pre R11.5.4	ibeiinvh.jsp
SHOW ORDER DETAIL	STORE_PSI_ORDER_DETAIL	Others	Shows order detail - pre R11.5.4	ibeiodtl.jsp
SHOW SEARCH HEADERS	STORE_PSI_ORDER_SUMMARY	Others	Order search results page - pre R11.5.4	ibeiohdr.jsp
PAYMENT DETAIL	STORE_PSI_PAYMENT_DETAIL	Others	Payment details - pre R11.5.4	ibeipmtd.jsp
PAYMENT SUMMARY	STORE_PSI_PAYMENT_SUMMARY	Others	Payment summary - pre R11.5.4	ibeipmth.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
SHIPMENT	STORE_PSI_SHIPMENT_DETAIL	Others	Shipment details - pre R11.5.4	ibeiship.jsp
POST SALES NAVIGATION BAR	STORE_PSI_SIDE_NAVBAR	Others	Post sales navigation bar - pre R11.5.4	ibeiside.jsp
ATP HEADER	STORE_PSI_ATP_HEADER	Others	Display ATP headers - pre-R11.5.4	ibeiatph.jsp
ATP REDIRECT	STORE_PSI_ATP_REDIRECT	Others	ATP Redirect page - pre-R11.5.4	ibeiatpr.jsp
ATP RESULTS	STORE_PSI_ITEM_AVAILABILITY	Others	Item availability report - pre-R11.5.4	ibeicatp.jsp
CONFIGURATOR BRANCH	STORE_CONFIG_BRANCH	Others	Processes a configurator request - pre-R11.5.4	ibefbrch.jsp
CONFIGURED ITEM DISPLAY	STORE_CONFIG_DISPLAY	Others	Include page to display a configured item - pre-R11.5.4	ibefdisp.jsp
CONFIGURATOR FRAME	STORE_CONFIG_FRAME_SRCS	Others	Provides frame specification to the configurator - pre-R11.5.4	ibeffrms.jsp
CONFIGURATOR LAUNCH	STORE_CONFIG_LAUNCH	Others	Launches the configurator - pre-R11.5.4	ibefcnfg.jsp
CONFIGURATOR REDIRECT	STORE_CONFIG_REDIRECT	Others	Redirects request to the configurator - pre-R11.5.4	ibefredr.jsp
EXPRESS CHK OUT CANCEL	STORE_ORDER_XPR_CANCEL	Others	Cancel a express chk out order - pre-R11.5.4	ibeo1ccl.jsp
EXPRESS CHK OUT ERROR	STORE_ORDER_XPR_ERROR	Others	Error during express chk out - pre-R11.5.4	ibeo1err.jsp
EXPRESS CHK OUT PROCESS	STORE_ORDER_XPR_PROCESS	Others	Processes the express chk out request - pre-R11.5.4	ibeo1dob.jsp
EXPRESS CHK OUT SETTINGS DISPLAY	STORE_ORDER_XPR_SETTINGS_DISPLAY	Others	Displays express chk out settings - pre-R11.5.4	ibeo1set.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
EXPRESS CHK OUT SETTINGS SAVE	STORE_ORDER_XPR_SETTINGS_SAVE	Others	Save express chk out settings - pre-R11.5.4	ibeo1sav.jsp
EXPRESS CHK OUT TAG AREA	STORE_ORDER_XPR_TAG_AREA	Others	Displays the area around the chk out tag - pre-R11.5.4	ibeo1tag.jsp
EXPRESS CHK OUT VIEW	STORE_ORDER_XPR_VIEW	Others	View a express chk out order - pre-R11.5.4	ibeo1view.jsp
Account Select Display	STORE_CUST_ACC_SELECT	Others	Account Select Display - not used post R11.5.9	ibeCAcdChooseAcct.jsp
Account Select Processing	STORE_CUST_ACC_SELECTED	Others	Account Select Processing - not used post R11.5.9	ibeCAcpChooseAcct.jsp
My account menu	STORE_CUST_ACC_SUBMENU	Others	My account menu - not used post R11.5.9	ibeCAcdMenu.jsp
User profile	STORE_CUST_PROFILE	Others	User profile - not used post R11.5.9	ibeCAcpProfile.jsp
USER ACCOUNT LOGIN	STORE_USR_ACC_LOGIN	Others	User account login - pre-R11.5.4	ibealgn1.jsp
USER ACCOUNT AUTHENTICATION	STORE_USR_ACC_LOGIN_AUTH	Others	User account authentication - pre-R11.5.4	ibealgn2.jsp
USER ACCOUNT CREATION	STORE_USR_ACC_CREATE	Others	User account creation - pre-R11.5.4	ibebrac.jsp
USER ACCOUNT EDIT	STORE_USR_ACC_EDIT	Others	User account edit - pre-R11.5.4	ibebrmoac.jsp
USER ACCOUNT HOME	STORE_USR_ACC_HOME	Others	User account home - pre-R11.5.4	ibeahome.jsp
USER ACCOUNT LOGOUT	STORE_USR_ACC_LOGOUT	Others	User account logout - pre-R11.5.4	ibealgot.jsp
User Password	STORE_USR_ACC_PASSWORD	Others	User Password - pre-R11.5.4	ibeapwd.jsp
USER ACCOUNT SELECTION	STORE_USR_ACC_SELECT	Others	User account selection - pre-R11.5.4	ibealgn3.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
USER ACCOUNT SELECTED	STORE_USR_ACC_ SELECTED	Others	User account selected - pre-R11.5.4	ibeaIgn4.jsp
USER ACCOUNT SUBMENU	STORE_USR_ACC_ SUBMENU	Others	User account submenu - pre-R11.5.4	ibeamenu.jsp
User Welcome Bin	STORE_USR_ACC_ WELCOME	Others	User welcome bin - pre-R11.5.4	ibeawlcm.jsp
USER CREATION	STORE_USR_ CREATE	Others	User creation - pre-R11.5.4	ibebcrus.jsp
USER EDIT	STORE_USR_EDIT	Others	User edit - pre-R11.5.4	ibebmous.jsp
Store User Signin	STORE_USR_SIGNIN	Others	Store User Signin - pre-R11.5.4	ibeasgnn.jsp
SHOPPING CART ADD ITEM	STORE_SCART_ ADD_ITEM	Others	Add Item to Cart Page - pre-R11.5.4	ibescaIh.jsp
SHOPPING CART ADD ONE ITEM	STORE_SCART_ ADD_ONE_ITEM	Others	Add Item to Cart Page for one item - pre-R11.5.4	ibescabh.jsp
SHOPPING CART BLURB	STORE_SCART_ BLURB	Others	Shopping cart blurb - pre-R11.5.4	ibescaIh.jsp
SHOP CART DIRECT ENTRY	STORE_SCART_ DIRECT_ENTRY	Others	Enter customers inv items to cart - direct entry - pre-R11.5.4	ibescedh.jsp
SHOP CART DIRECT ENTRY PROCESS	STORE_SCART_ DIRECT_ENTRY_P	Others	Processes direct entries - pre-R11.5.4	ibescedp.jsp
SHOPPING CART GET SHAREE	STORE_SCART_GET_ SHAREE	Others	Retrieve sharee shopping cart - pre-R11.5.4	ibescrsh.jsp
SHOPPING CART GET SHAREE PROCESS	STORE_SCART_GET_ SHAREE_P	Others	Retrieve sharee shopping cart process page - pre-R11.5.4	ibescrsr.jsp
SHOPPING CART LIST1	STORE_SCART_ LIST1	Others	Convert Cart to List 1 - pre-R11.5.4	ibesccar.jsp
SHOPPING CART LIST1 ROUTE	STORE_SCART_ LIST1_P	Others	Convert Cart to List 1 Process Page - pre-R11.5.4	ibesccbr.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
SHOPPING CART LIST2	STORE_SCART_LIST2	Others	Convert Cart to List 2 - pre-R11.5.4	ibesccla.jsp
SHOPPING CART LIST2 PROCESS	STORE_SCART_LIST2_P	Others	Convert cart to list 2 process page - pre-R11.5.4	ibescclb.jsp
SHOPPING CART MODIFY	STORE_SCART_MODIFY	Others	Modify shopping cart - pre-R11.5.4	ibescdch.jsp
SHOPPING CART MODIFY PROCESS	STORE_SCART_MODIFY_P	Others	Modify shopping cart process page - pre-R11.5.4	ibescdcr.jsp
SHOPPING CART SAVE	STORE_SCART_SAVE	Others	Save shopping cart - pre-R11.5.4	ibescsch.jsp
SHOPPING CART SAVE PROCESS	STORE_SCART_SAVE_P	Others	Save shopping cart process page - pre-R11.5.4	ibescscr.jsp
SHOPPING CART SAVE ACTIVE CART	STORE_SCART_SAVE_ACTIVE_CART	Others	Saves active cart - pre-R11.5.4	ibescsap.jsp
SHOP CART SAVE ACTIVE CART PROCESS	STORE_SCART_SAVE_ACTIVE_CART_P	Others	Save active cart process page - pre-R11.5.4	ibescsar.jsp
SHOPPING CART SAVE SHAREE	STORE_SCART_SAVE_SHAREE	Others	Save sharee shopping cart - pre-R11.5.4	ibescssh.jsp
SHOPPING CART SAVE SHAREE PROCESS	STORE_SCART_SAVE_SHAREE_P	Others	Save sharee shopping cart process page - pre-R11.5.4	ibescssr.jsp
SHOPPING CART SHARE MERCHANT	STORE_SCART_SHARE_MERCHANT	Others	Share cart with merchant - pre-R11.5.4	ibescsmh.jsp
SHOPPING CART SHARE MERCHANT PROCESS	STORE_SCART_SHARE_MERCHANT_P	Others	Share cart with merchant process page - pre-R11.5.4	ibescsmr.jsp
SHOPPING CART VIEW	STORE_SCART_VIEW	Others	View shopping cart - pre-R11.5.4	ibescvch.jsp
SHOPPING CART VIEW PROCESS	STORE_SCART_VIEW_P	Others	View shopping cart process page - pre-R11.5.4	ibescvcr.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
SHOPPING CART VIEW DISCOUNT	STORE_SCART_ VIEW_DISCOUNT	Others	View shopping cart discount - pre-R11.5.4	ibescpch.jsp
SHOPPING CART LISTS VIEW	STORE_SCART_ VIEW_LIST	Others	View shopping cart lists - pre-R11.5.4	ibescdlh.jsp
SHOPPING CART LISTS VIEW PROCESS	STORE_SCART_ VIEW_LIST_P	Others	View shopping cart lists process page - pre-R11.5.4	ibescdlr.jsp
SHOPPING CART WARN 1	STORE_SCART_ WARN1	Others	Shopping cart warning page - pre-R11.5.4	ibescwha.jsp
SHOPPING CART WARN 2	STORE_SCART_ WARN2	Others	Shopping cart warning page - pre-R11.5.4	ibescwhb.jsp
REGISTER USER	STORE_REGISTER_ USER	Others	Register new user - pre-R11.5.4	ibescuih.jsp
User Account Management	STORE_USR_MGMT_ ACC_W	Others	User Account Management - not used post R11.5.9	ibeCUmpAcctWrap.js p
Add User Account	STORE_USR_MGMT_ ADD_ACC_W	Others	Add User Account - not used post R11.5.9	ibeCUmpAddAcctWr ap.jsp
Permission Management	STORE_USR_MGMT_ PERM_W	Others	Permission Management - not used post R11.5.9	ibeCUmpPermWrap.js p
Role Management	STORE_USR_MGMT_ ROLE_W	Others	Role Management - not used post R11.5.9	ibeCUmpRoleWrap.js p
User Management	STORE_USR_MGMT_ USER_W	Others	User Management - not used post R11.5.9	ibeCUmpUserWrap.js p
Role Delete	STORE_USR_ROLE_ DELETE	Others	Role Delete - not used post R11.5.9	ibeCUmdRoleDelCfm. jsp
Role processing	STORE_USR_ROLE_ PROCESS	Others	Role processing - not used post R11.5.9	ibeCUmpRole.jsp
Role creation	STORE_USR_ROLE_ CREATE	Others	Role creation - not used post R11.5.9	ibeCUmdRoleCreate.j sp
Business User registration display	STORE_CUST_ BUSINESS_ REGISTRATION	Others	Business User registration display - not used post R11.5.9	ibeCAcdBizUserReg.js p



**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
Registration processing	STORE_CUST_REGISTRATION	Others	Registration processing - not used post R11.5.9	ibeCAcpRegistration.jsp
End User registration display	STORE_CUST_SIGNIN	Others	End User registration display - not used post R11.5.9	ibeCAcdEndUserReg.jsp
User Account Management	STORE_USR_ADMIN_ACC	Others	User Account Management - pre-R11.5.4	ibebusac.jsp
User Account Management	STORE_USR_ADMIN_ACC_W	Others	User Account Management - pre-R11.5.4	ibebwusa.jsp
Add User Account	STORE_USR_ADMIN_ADD_ACC	Others	Add User Account - pre-R11.5.4	ibebadac.jsp
Add User Account	STORE_USR_ADMIN_ADD_ACC_W	Others	Add User Account - pre-R11.5.4	ibebwada.jsp
Permission Management	STORE_USR_ADMIN_PERM	Others	Permission Management - pre-R11.5.4	ibebperm.jsp
Permission Management	STORE_USR_ADMIN_PERM_W	Others	Permission Management - pre-R11.5.4	ibebwprm.jsp
Role Management	STORE_USR_ADMIN_ROLE	Others	Role Management - pre-R11.5.4	ibebrole.jsp
Role Management	STORE_USR_ADMIN_ROLE_W	Others	Role Management - pre-R11.5.4	ibebwrol.jsp
User Management	STORE_USR_ADMIN_USER	Others	User Management - pre-R11.5.4	ibebuser.jsp
User Management	STORE_USR_ADMIN_USER_W	Others	User Management - pre-R11.5.4	ibebwusr.jsp
USER CREDIT CARD CREATION	STORE_USR_CC_CREATE	Others	User credit card creation - pre-R11.5.4	ibeaccr.jsp
USER CREDIT CARD DELETION	STORE_USR_CC_DELETE	Others	User credit card deletion - pre-R11.5.4	ibeacd1.jsp
USER CREDIT CARD DISPLAY	STORE_USR_CC_DISPLAY	Others	User credit card display - pre-R11.5.4	ibeaccv1.jsp

**Table E-20 Non-Current Display Templates**

<b>Name</b>	<b>Prog. Access Name</b>	<b>Category</b>	<b>Description</b>	<b>Source File</b>
USER CREDIT CARD EDIT	STORE_USR_CC_EDIT	Others	User credit card edit - pre-R11.5.4	ibeaccdd.jsp
USER CREDIT CARD EXPIRATION	STORE_USR_CC_EXPIRATION	Others	User credit card expiration - pre-R11.5.4	ibeaccex.jsp
USER CREDIT CARD PRIMARY	STORE_USR_CC_PRIMARY	Others	User credit card primary - pre-R11.5.4	ibeaccpr.jsp
USER PAYMENT BOOKS DISPLAY	STORE_USR_PMTBK_DISPLAY	Others	Displays an user payment books - pre-R11.5.4	ibeapmtb.jsp
USER PAYMENT BOOKS SAVE	STORE_USR_PMTBK_SAVE	Others	Saves an user payment books - pre-R11.5.4	ibeapbsv.jsp
ADDRESS BOOK	STORE_ADDR_BOOK	Others	Shows address book entries - pre-R11.5.4	ibeaadbk.jsp
ADDRESS CREATE	STORE_ADDR_CREATE	Others	Create address book entry - pre-R11.5.4	ibeaadcr.jsp
ADDRESS DELETE	STORE_ADDR_DELETE	Others	Deletes an address book entry - pre-R11.5.4	ibeaaddl.jsp
ADDRESS DISPLAY	STORE_ADDR_DISPLAY	Others	Displays the address book - pre-R11.5.4	ibeaadv1.jsp
ADDRESS DISPLAY ALTERNATIVE	STORE_ADDR_DISPLAY_ALT	Others	Displays the address book - pre-R11.5.4	ibeaadv2.jsp
ADDRESS EDIT	STORE_ADDR_EDIT	Others	Edit an address book entry - pre-R11.5.4	ibeaaded.jsp
ADDRESS PRIMARY	STORE_ADDR_PRIMARY	Others	Displays the primary address of the customer - pre-R11.5.4	ibeaadpr.jsp
ADDRESS SELECT	STORE_ADDR_SELECT	Others	Select a particular address - pre-R11.5.4	ibeaads1.jsp
SEARCH REFINE	STORE_SRCH_REFINE	Others	Refine search criteria - 11.5.4 Maintenance Pack	ibecskrf.jsp

**Table E-20 Non-Current Display Templates**

Name	Prog. Access Name	Category	Description	Source File
SEARCH RESULT	STORE_SRCH_RESULT	Others	Shows search results - 11.5.4 Maintenance Pack	ibecskr3.jsp
Store Help	STORE_HELP		Store Help - 11.5.5 Maintenance Pack	ibeahelp.jsp
Store Home	STORE_HOME		Store home page - 11.5.4 Maintenance Pack	ibezhome.jsp

## E.22 Media Objects

The following table, [Table E-21, "Media Objects"](#), lists seeded media objects. Source files are stored in the OA\_MEDIA directory.

For a list of the language image media objects, see [Section 6.4.4, "Language Images"](#).

For a list of messages which also are seeded as media objects, see [Section 9.3.1, "Using Media Objects to Present Message Text"](#).

For a list of content components, see [Section 9.2.1, "Seeded Content Components"](#).

**Table E-21 Media Objects**

Name	Programmatic Access Name	Source File	Usage Suggestion
Store section small image	STORE_CTLG_SECTION_SMALL_IMAGE	none	Use to display section small images
Store item small image	STORE_CTLG_PRODUCT_SMALL_IMAGE	none	Use to display product small images
Store item large image	STORE_CTLG_PRODUCT_LARGE_IMAGE	none	Use to display product large images
Calalogue Item Dropdown Image	STORE_CTLG_ITEM_DROP_DOWN_IMAGE	none	Use to display product drop-down images
Catalogue Section Link image	STORE_CTLG_SCT_LINK_IMAGE	none	Use to display product images in multiple select templates
Tab Deselected Close Image	STORE_TAB_DESEL_CLOSE	ibeEOSltlr5_default.gif	Use to display right corner of deselected tab in menu bar

**Table E–21 Media Objects (Cont.)**

<b>Name</b>	<b>Programmatic Access Name</b>	<b>Source File</b>	<b>Usage Suggestion</b>
My Account	STORE_TAB_LINK_ACCT	ibeTabLinkAcct.gif	Profile button at top right of screen
Shopping Cart	STORE_TAB_LINK_CART	ibeTabLinkCart.gif	Cart button at top right of screen
Help	STORE_TAB_LINK_HELP	ibeTabLinkHelp.gif	Help button at top right of screen
Order Tracker	STORE_TAB_LINK_ORDER	ibeTabLinkOrder.gif	Order button at top right of screen
Store Logo	STORE_TAB_LOGO	none	Logo displayed at the top left of the catalog pages
Store Logo	STORE_LOGO	none	
Store Main Logo	STORE_LOGO_MAIN	ibeTabLogo.gif	Logo that displays at the top left of the Site Selection Page
Specialty Site Logo Image	STORE_LOGO_SPECIALTY	none	The small images displayed in front of the specialty sites in site selection page
Tab Selected Close Image	STORE_TAB_SEL_CLOSE	ibeEOStltr6_default.gif	Use to display right corner of selected tab in menu bar
Bin Open Image	STORE_BIN_OPEN_IMAGE	ibeEOSutl02_default.gif	Use to display left corner of bin
Bin Close Image	STORE_BIN_CLOSE_IMAGE	ibeEOSutr02_default.gif	Use to display right corner of bin
Selected Cart Image	STORE_SEL_CART_IMAGE	ibeTabLinkCartS.gif	Use to display the selected cart icon
Deselected Cart Image	STORE_DESEL_CART_IMAGE	ibeTabLinkCart.gif	Use to display the deselected cart icon
Selected Account Image	STORE_SEL_ACCOUNT_IMAGE	ibeEOSuspr1_default.gif	Use to display the selected account icon
Deselected Account Image	STORE_DESEL_ACCOUNT_IMAGE	ibeEOSuspr0_default.gif	Use to display the deselected account icon
Selected Order Image	STORE_SEL_ORDER_IMAGE	ibeTabLinkOrderS.gif	Use to display the selected order icon

**Table E-21 Media Objects (Cont.)**

<b>Name</b>	<b>Programmatic Access Name</b>	<b>Source File</b>	<b>Usage Suggestion</b>
Deselected Order Image	STORE_DESEL_ORDER_IMAGE	ibeTabLinkOrder.gif	Use to display the deselected order icon
Selected Help Image	STORE_SEL_HELP_IMAGE	ibeTabLinkHelpS.gif	Use to display the selected help icon
Deselected Help Image	STORE_DESEL_HELP_IMAGE	ibeTabLinkHelp.gif	Use to display the deselected help icon
Transparent Image	STORE_TRANSPARENT_IMAGE	ibeEOSutrp_x_default.gif	
Subtab Top Image	STORE_SUBTAB_TOP	ibeEOSunvbf_default.gif	Use to display the top image of subtab bar
Subtab Separator Image	STORE_SUBTAB_SEPARATOR	ibeEOSussepx_default.gif	Use to display the image of subtab separator
Tab Deselected Open Image	STORE_TAB_DESEL_OPEN	ibeEOSltr0_default.gif	Use to display left corner of deselected tab in menu bar
Tab Selected Open Image	STORE_TAB_SEL_OPEN	ibeEOSltr1_default.gif	Use to display left corner of selected tab in menu bar
Tab Deselected Close Selected Open Image	STORE_TAB_DESEL_CLOSE_DESEL_OPEN	ibeEOSltr2_default.gif	Use to display the image between two deselected tabs in menu bar
Tab Deselected Close Selected Open Image	STORE_TAB_DESEL_CLOSE_SEL_OPEN	ibeEOSltr3_default.gif	Use to display the image between a deselected tab and a selected tab in menu bar
Tab Selected Close Deselected Open Image	STORE_TAB_SEL_CLOSE_DESEL_OPEN	ibeEOSltr4_default.gif	Use to display the image between a selected tab and a deselected tab in menu bar
Tab Bottom Image	STORE_TAB_BOTTOM	ibeEOSsltr1_default.gif	Use to display the bottom of tab in menu bar
Subtab Curve Top Image	STORE_SUBTAB_CURVE_TOP	ibeEOSsltr2_default.gif	Use to display the image of curve top in subtab bar
Subtab Curve Bottom Image	STORE_SUBTAB_CURVE_BOTTOM	ibeEOSsltr3_default.gif	Use to display the image of curve bottom in subtab bar
Menu Right Edge Top Image	STORE_MENU_RIGHT_EDGE_TOP	ibeEOSsltr4_default.gif	Use to display the image of right edge of menu bar

**Table E–21 Media Objects (Cont.)**

<b>Name</b>	<b>Programmatic Access Name</b>	<b>Source File</b>	<b>Usage Suggestion</b>
Subtab Bottom Image	STORE_SUBTAB_BOTTOM	ibeEOSsltr5_default.gif	Use to display the bottom of subtab in subtab bar
Menu Left Edge Image	STORE_MENU_LEFT_EDGE	ibeEOSsltr6_default.gif	Use to display the left edge of menu bar
Menu Right Edge Bottom Image	STORE_MENU_RIGHT_EDGE_BOTTOM	ibeEOSsltr7_default.gif	Use to display the bottom of right edge of menu bar
Sign In Image	STORE_SIGN_IN_IMAGE	ibeEOSusin_default.gif	Use to display the sign in icon
Sign Out Image	STORE_SIGN_OUT_IMAGE	ibeEOSusout_default.gif	Use to display the sign off icon
Store Bar Top Image	STORE_BAR_TOP	ibeEOSwltr1_default.gif	Use to display the bar top image
Store Bar Bottom Image	STORE_BAR_BOTTOM	ibeEOSwltr5_default.gif	Use to display the bar bottom image
Store Bar Top Curve Image	STORE_BAR_CURVE_TOP	ibeEOSwltr2_default.gif	Use to display the top of bar curve image
Store Bar Bottom Curve Image	STORE_BAR_CURVE_BOTTOM	ibeEOSwltr3_default.gif	Use to display the bottom of bar curve image
Store Bar Tail Curve Image	STORE_BAR_CURVE_TAIL	ibeEOSbtail_default.gif	Use to display the tail of bar curve image
Selected Sites image	STORE_SEL_STORE_IMAGE	ibeTabLinkStoresS.gif	Use to display the selected site icon
Deselected Sites image	STORE_DESEL_STORE_IMAGE	ibeTabLinkStores.gif	Use to display the deselected site icon
Store copyright text	STORE_BOTTOM_CUST_COPYRIGHT	none	Use to display copyright statement at the bottom of Customer UI
Store privacy link	STORE_BOTTOM_CUST_PRIVACY	none	Use to display privacy link (HTML link) at the bottom of Customer UI

---

## Customer UI Process Flows

This appendix contains process flows for the Customer UI of Oracle iStore 11*i*.

Main topics in this appendix include:

- [Section F.1, "Process Flows for Specialty Sites"](#)
- [Section F.2, "Process Flow for Product Search"](#)
- [Section F.3, "Process Flows for Shopping Carts"](#)
- [Section F.4, "Process Flow for Saving Carts"](#)
- [Section F.5, "Process Flow for Cart Sharing and Retrieval"](#)
- [Section F.6, "Process Flow for Shopping Lists"](#)
- [Section F.7, "My Carts Page Process Flow"](#)
- [Section F.8, "My Quotes Page Process Flow"](#)
- [Section F.9, "Update Quote Process Flow"](#)
- [Section F.10, "Process Flow for B2B Checkout"](#)
- [Section F.11, "Process Flow for B2C Checkout"](#)
- [Section F.12, "Process Flow for User Account"](#)
- [Section F.13, "Process Flow for User Profile"](#)
- [Section F.14, "Process Flow for Order Tracker"](#)
- [Section F.15, "Sample User Registration Flows"](#)

**Note:** Many of the flows depicted in this appendix display functionality that is only enabled if B2B users have specific permissions in their user roles. See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for information about the B2B permissions.

## F.1 Process Flows for Specialty Sites

The flow through your specialty sites must follow a certain path, as shown in the following top-level diagram and related detail diagrams. Oracle iStore provides templates you can use for the pages illustrated in the diagrams. For more information, see:

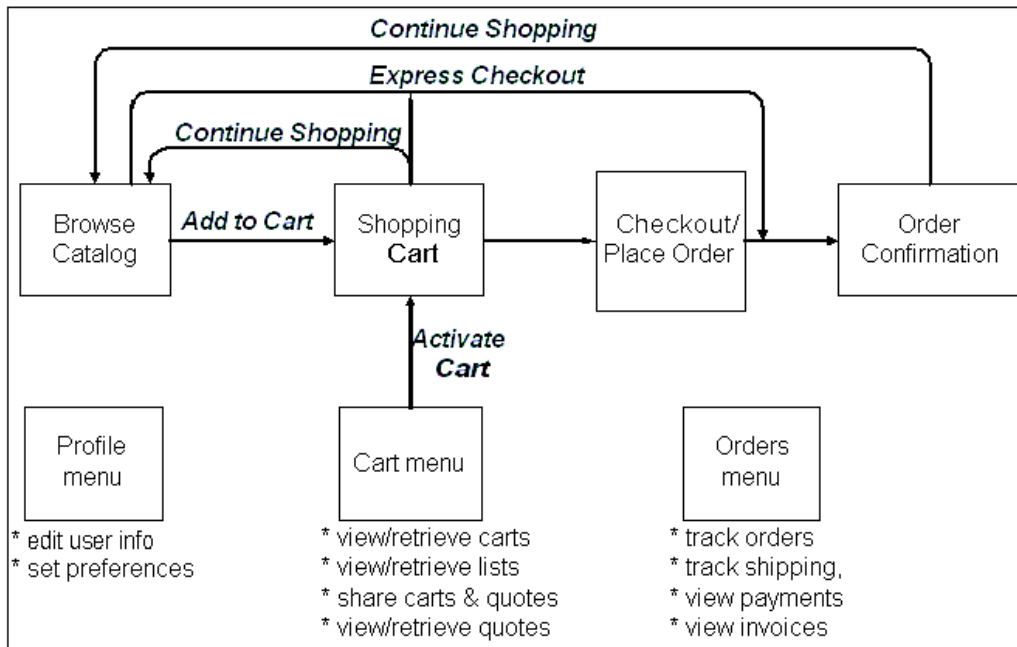
- [Chapter 9, "Implementing Content"](#)
- [Appendix D, "Advanced Display"](#)
- [Appendix E, "Display Templates and Media Objects"](#)

### F.1.0.1 Process Flows for Specialty Sites

1. Users enter the site and browse through the catalog, optionally searching for items.
2. Users add items to the shopping cart and then check out with the cart to place an order.
3. Users can also retrieve saved and shared shopping carts and quotes, as well as shopping lists using the Cart menu.
4. From the shopping cart, pressing the Continue Shopping button takes users back to the Site Home Page.
5. Users can select Profile to set their preferences, access their address data, and reset their passwords. B2B users can access company information if the administrator has enabled it.
6. Users can also retrieve their account information --- including orders, invoices, payment information --- by accessing the Orders menu.
7. The checkout process takes users to the confirmation page. See [Section 12.4.1, "Checkout/Order Placement Process Flow"](#), for more information.
8. Users can select Express Checkout to omit the shopping cart and checkout process; express checkout orders are picked up by a concurrent program and submitted automatically. See [Section 12.4.8, "Express Checkout"](#), for more information.

The following graphic, [Figure F-1, "Process Flow for Specialty Sites"](#), depicts this flow.



**Figure F-1 Process Flow for Specialty Sites**

## F.2 Process Flow for Product Search

Product search capability from the Site Home Page allows users to locate products by various criteria, if the administrator has enabled this functionality. Users also can browse through sections to locate products.

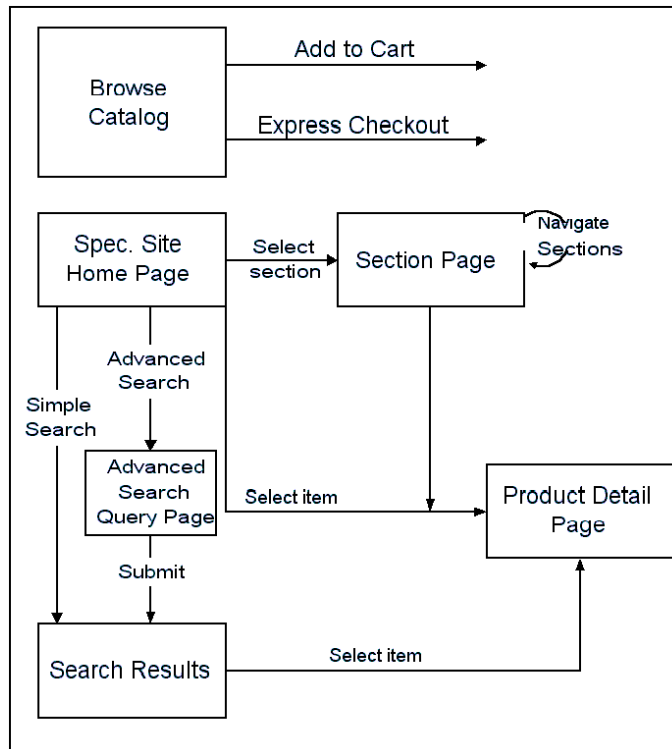
### F.2.0.2 Process Flow for Product Search

1. Users enter the site at the Site Home Page. Users view groupings of products within sections, and can navigate through the sections to find products.
2. From the Site Home Page, users can conduct a Simple or Advanced search to find products.
3. In the search Results page, users may select a product to review detailed product information.
4. Users can Add to Cart and perform Express Checkout (if enabled) from section and product detail pages.

See [Section 7.9, "Setting up Product Search for the Customer UI"](#), for implementation details.

The following graphic, [Figure F–2, "Process Flow for Product Search"](#), illustrates this flow.

**Figure F–2 Process Flow for Product Search**



## F.3 Process Flows for Shopping Carts

The diagram and related text in this section show the high-level shopping cart flow. See the related detail flows for more information:

- [Section F.4, "Process Flow for Saving Carts"](#)
- [Section F.5, "Process Flow for Cart Sharing and Retrieval"](#)
- [Section F.6, "Process Flow for Shopping Lists"](#)

- [Section F.7, "My Carts Page Process Flow"](#)
- [Section F.8, "My Quotes Page Process Flow"](#)

### **F.3.0.3 High-Level Process Flow for Shopping Cart**

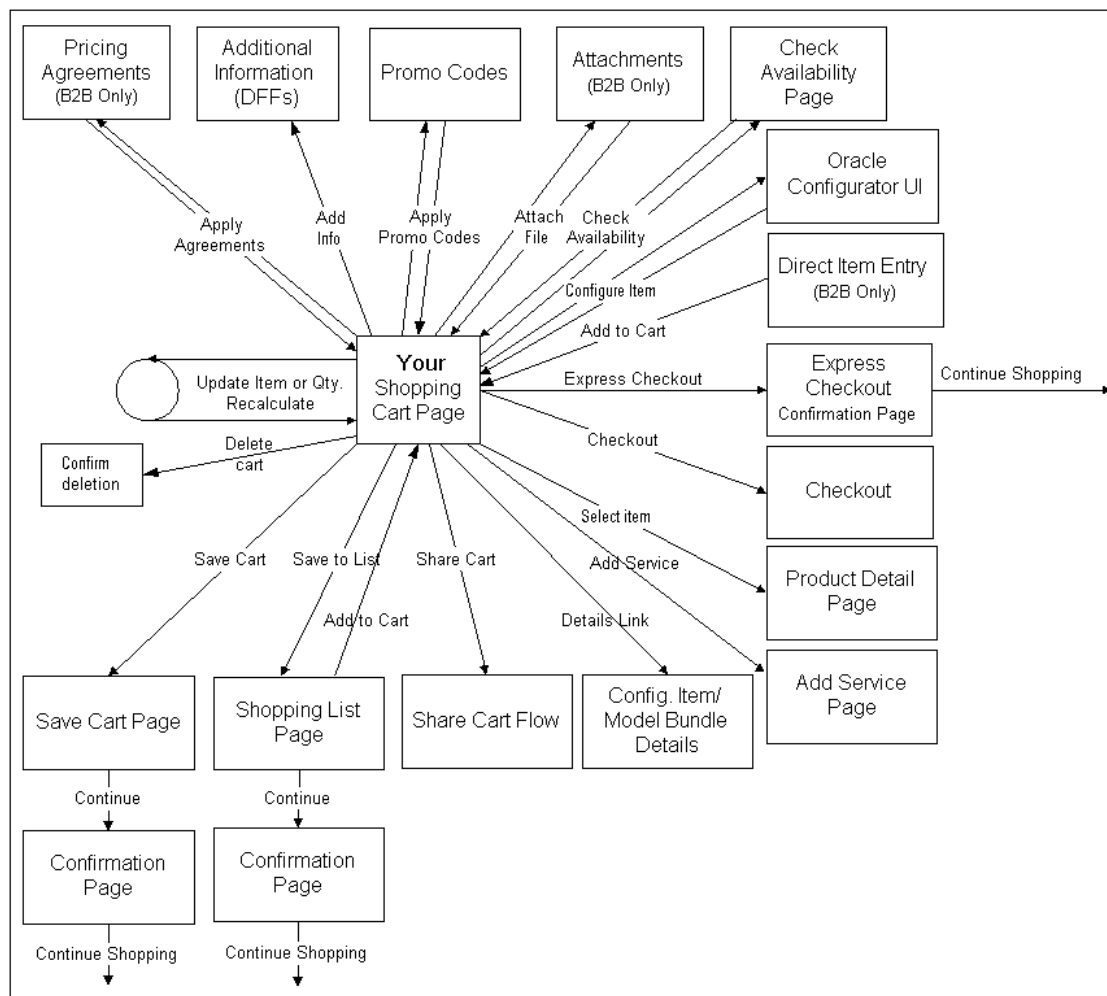
While browsing the site, users add products to their shopping carts. When users add a product, the Your Shopping Cart page is displayed. This is the user's active cart. Users can review the items in the cart and perform other cart-related actions, including:

- Drill-down to item details
- Update items or quantity / recalculate
- Save and delete carts -- See [Section F.4, "Process Flow for Saving Carts"](#), for this flow.
- Share carts -- See [Section F.5, "Process Flow for Cart Sharing and Retrieval"](#), for this flow.
- Save items to shopping lists -- See [Section F.6, "Process Flow for Shopping Lists"](#), for this flow.
- Use Express Checkout -- See [Section 12.4.8.1, "Express Checkout Process Flow"](#), for this flow.
- Check item availability
- Enter promotion codes
- Select pricing agreements (B2B only)
- Add attachments (B2B only)
- Configure items and view model bundle and configured item details
- Use Direct Item Entry (B2B only) -- See [Section 12.2.2, "Direct Item Entry Process Flow"](#) and [Section 12.2.3, "Process Flow for Uploading Comma Separated Values File"](#) for these flows.
- Add services
- Add additional information via descriptive flexfields -- See [Section D.2.2, "DFF Process Flows"](#), for this flow.
- Checkout and place orders -- See [Section F.10, "Process Flow for B2B Checkout"](#), and [Section F.11, "Process Flow for B2C Checkout"](#), for these flows.

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

The following diagram, [Figure F-3, "High-Level Process Flow for Your Shopping Cart"](#), depicts this flow.

**Figure F-3 High-Level Process Flow for Your Shopping Cart**



## F.4 Process Flow for Saving Carts

Users can save a shopping cart at any time by selecting the Save Cart button in the Your Shopping Cart page (this is the active cart).

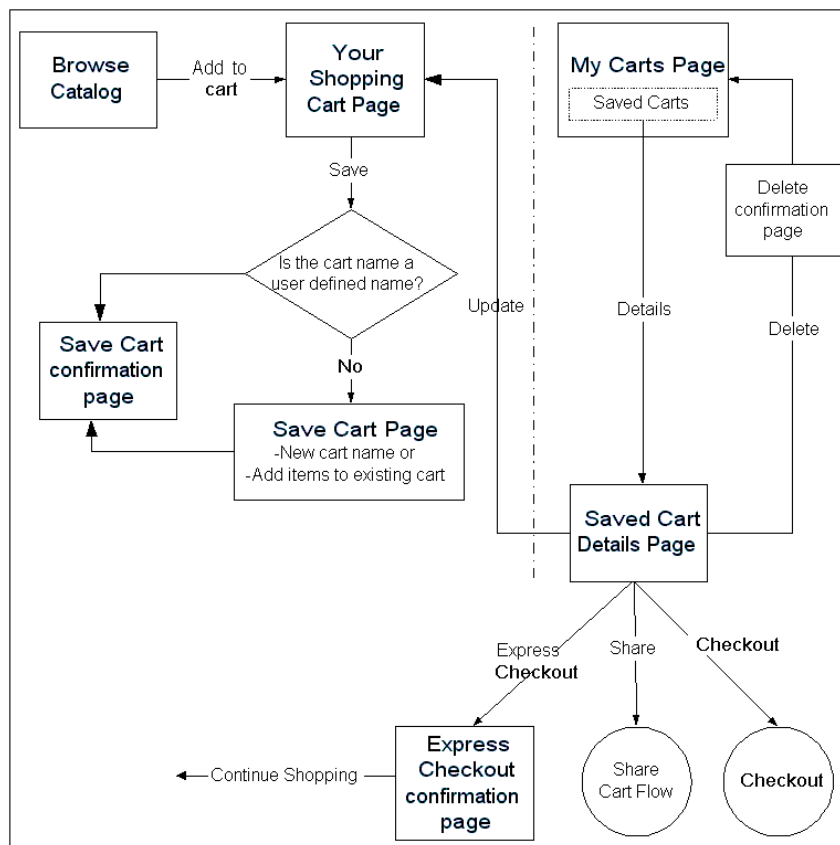
Oracle iStore automatically saves carts with default names, if the user does not explicitly save them. See [Section 12.1.8, "System-Saved and Default-Named Shopping Carts"](#), for more information.

1. Users press the Save Cart button in the Your Shopping Cart page.
2. If the user saves the cart and the cart does not yet have a user-defined name, after selecting the Save Cart button, the user can either create a new saved cart or add items to an existing cart.
3. Oracle iStore displays a confirmation message when the cart is saved.
4. Users can then press the Continue Shopping button to continue browsing the specialty sites.
5. To retrieve saved carts, users navigate to the My Carts page within the Cart menu. In the Saved Carts area of the page, users select the cart name hyperlink to retrieve the Saved Cart Details page.
6. From the Saved Cart Details page, users can use Express Checkout, share the cart, check out, or delete the cart.
7. To activate and potentially modify the cart, the user presses the Update button. The cart then becomes the active cart and the page is named Your Shopping Cart.

See [Section 12.1, "Shopping Carts"](#), for additional details.

The following diagram, [Figure F-4, "Cart Saving Process Flow"](#), illustrates this process flow.

**Figure F-4 Cart Saving Process Flow**



## F.5 Process Flow for Cart Sharing and Retrieval

Share cart functionality is available for both B2B and B2C users, and can be controlled by setting a profile option.

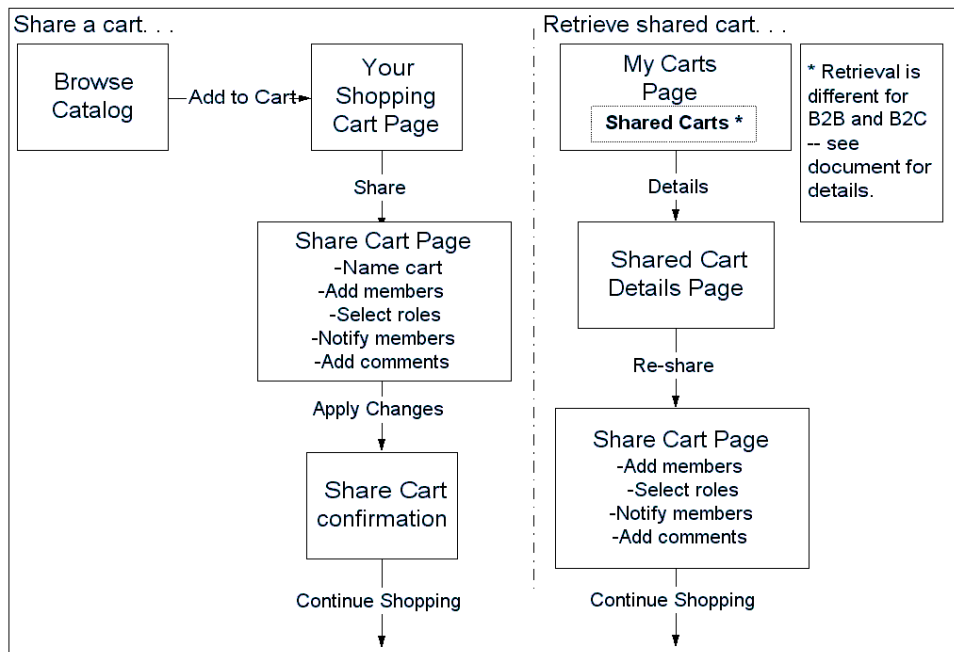
1. Users can press the Share Cart button to share the cart with other users at any time, up until the review and place order process.
2. B2B and B2C users select cart members in different ways:
  - a. In a B2B scenario, the cart owner selects from members who are registered Oracle iStore users in the same organization and using the same account number. The search mechanism retrieves only users matching this criteria.

- b. In a B2C scenario, the cart owner enters recipients' names and valid e-mail addresses.
3. Users select roles for the members and apply the selections. Oracle iStore displays a confirmation page.
4. Shared cart members receive an e-mail with instructions detailing how to access the shared cart.
5. To retrieve the shared cart, users can either select the URL hyperlink in the e-mail notification or navigate to the My Carts page, where they can select the shared cart name hyperlink (B2B users) or enter the shared cart retrieval number (B2C users). See [Section 12.3.6, "Retrieving Shared Carts"](#), for additional details of the retrieval process.
6. B2B members with administrator role can then re-share the cart with other members. B2C users must be the cart owner to re-share a cart.

See [Section 12.3, "Shopping Cart Sharing"](#), for additional details.

The following figure, [Figure F-5, "Cart Sharing and Retrieval Process Flow"](#), depicts this flow.

**Figure F-5 Cart Sharing and Retrieval Process Flow**



## F.6 Process Flow for Shopping Lists

Shopping lists enable users to store items that they may wish to purchase or that they purchase repeatedly.

1. The user presses the Save To List button in the Your Shopping Cart page.
2. The system prompts the user to enter a new name for the list or to merge the items to an existing list (if one exists).
3. Optionally, the user can enter comments for the list in the Comments textbox.
4. 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.
5. To add items to a cart, in the Shopping List Details page, the user selects the appropriate items in the shopping list and presses the Add to Cart button.
6. Optionally, in the Shopping List Details page, the user can also:

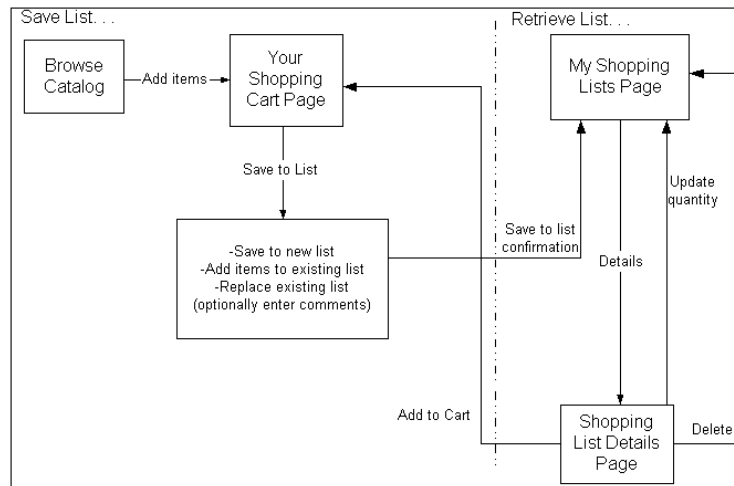


- Update item quantities by entering the numerical values in the Quantity field and pressing the Update Quantity button.
- Delete items in the list by activating an item's Select checkbox and pressing the Delete button (not the Delete List button).
- Drill down to product details by selecting the item name hyperlink. At this point, the user can add item(s) to a new cart and checkout, including Express Checkout.
- Delete the entire list by selecting the Delete List button.

See [Section 12.1.15, "Shopping Lists"](#), for more information.

The following diagram, [Figure F-6, "Shopping Lists Process Flow"](#), illustrates this flow.

**Figure F-6 Shopping Lists Process Flow**



## F.7 My Carts Page Process Flow

The My Carts page within the Cart menu is the entry point for most of the actions that users can perform with carts. The following diagram shows the actions from the My Carts page.

For the My Quotes page flow, see [Section F.8, "My Quotes Page Process Flow"](#).

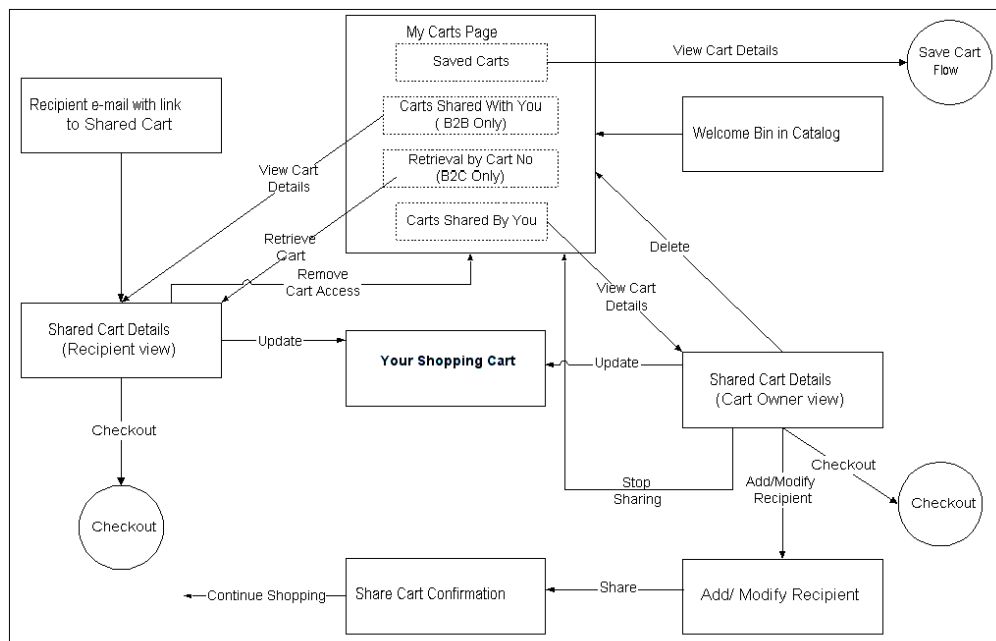
1. To view a list of saved or shared carts, both B2B and B2C registered users select the Cart icon in the Customer UI, and then select the My Carts subtab.

The main sections on the My Carts page are:

- Saved Carts
  - Carts Shared By You
  - Carts Shared With You (B2B only)
  - Cart Retrieval Textbox (B2C only)
2. To access details of the carts, the user selects the cart name hyperlink.
  3. In the Saved Cart Details and Shared Cart Details pages, users can view cart details.
  4. In the Shared Cart Details page, the actions the users can perform depend upon whether the users are recipients or owners of the carts -- if they are recipients, their actions are limited to those determined by the access levels set by the shared cart owner.

See [Chapter 12, "Implementing Carts and Orders"](#), for additional details.

The following diagram, [Figure F-7, "My Carts Page Process Flow"](#), illustrates this flow.



The My Quotes page within the Cart menu is the entry point for quote-related activities. Quotes can originate from:

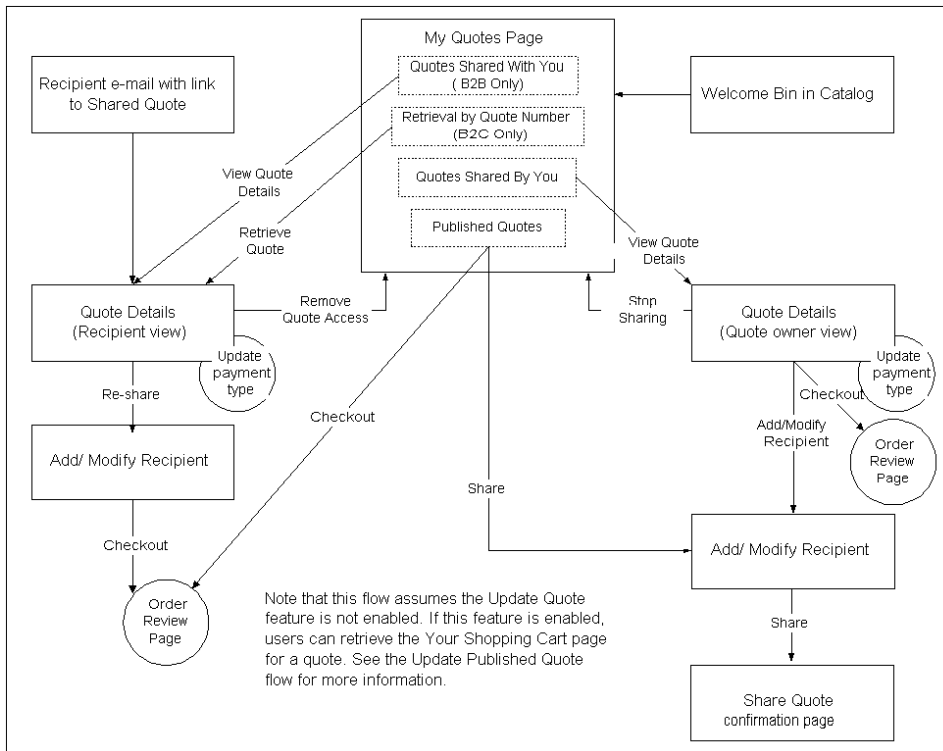
Note that you must integrate with Oracle Quoting to achieve this functionality.

for more information about quote publishing, and [Section 14.2, "Sales Assistance"](#), for more information about the Sales Assistance flows.

Note that this flow assumes the Update Quote feature is **not** enabled. If this feature is enabled and a quote is in Draft status, users can press Update Quote in the Quote Details page to retrieve the Your Shopping Cart page. See [Section F.9, "Update Quote Process Flow"](#), and the shopping carts flows for more information.

1. To view a list of published or shared quotes, both B2B and B2C registered users select the Cart icon in the Customer UI, and then select the My Quotes subtab.
2. The main sections on the My Quotes page are:
  - Published Quotes
  - Shared Quotes
    - Quotes Shared By You
    - Quotes Shared With You (B2B only)
    - Quote Retrieval Textbox (B2C only)
3. To access quote details, the user selects a quote name hyperlink.
4. In the Quote Details page, users can view details of a quote and update payment type information for the quote before checking out.
5. In the Quote Details page for a shared quote, the actions the users can perform depend upon their shared cart roles. For more information, see [Section 12.3.9, "Quote Sharing"](#).

The following diagram, [Figure F-8, "My Quotes Page Process Flow"](#), shows this flow.

**Figure F–8 My Quotes Page Process Flow**

## F.9 Update Quote Process Flow

By default, users are only able to update the payment type on a quote published in the Customer UI. Of course, they can always check out with a quote if the quote status allows it. You can allow users to perform normal update cart actions with a published quote by retrieving the Your Shopping Cart page for a quote. See [Section 28.3.5, "Allowing Customers to Update Published Quotes"](#), for implementation information.

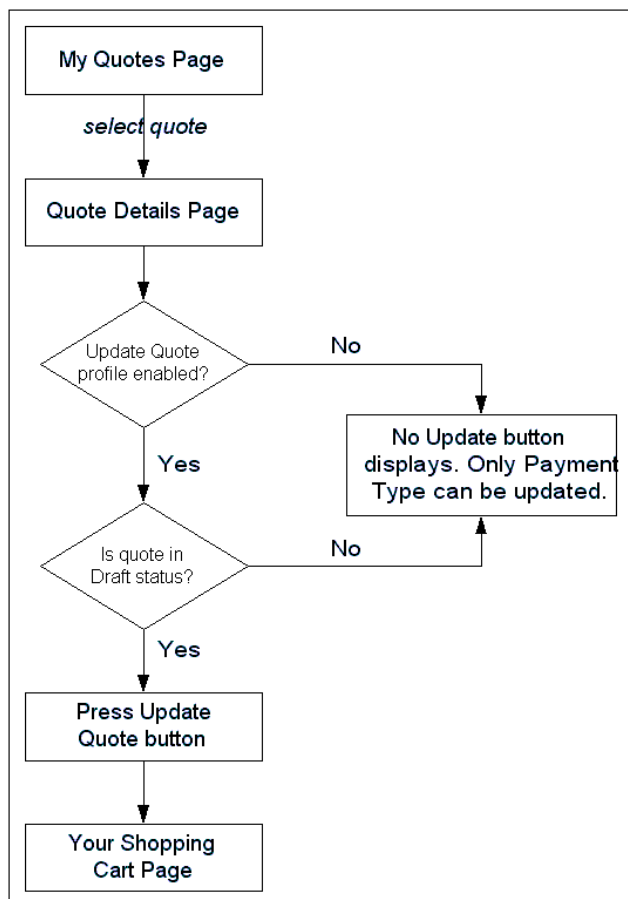
See also: [Section 12.3.9, "Quote Sharing"](#)

1. A B2B or B2C registered user selects the Cart icon in the Customer UI, and then selects the My Quotes subtab.
2. The user selects a quote name hyperlink to retrieve the Quote Details page. Note that this flow covers shared carts as well.

3. If the update quote feature is enabled, the Update Quote button in the Quote Details page allows access to the Your Shopping Cart page, where the user can perform normal cart actions.
4. To allow updating, Oracle iStore also requires that a quote be in Draft status in Oracle Quoting.

The following diagram, [Figure F-9, "Update Quote Process Flow"](#), illustrates this flow.

**Figure F-9 Update Quote Process Flow**



## F.10 Process Flow for B2B Checkout

B2B users who are ready to place their orders navigate to the checkout phase, where they enter shipping and payment information.

This section contains the following topics:

- [Section F.10.1, "B2B Shipping Information Process Flow"](#)
- [Section F.10.2, "Item-Level Shipping Information Process Flow"](#)
- [Section F.10.3, "B2B Billing Information Process Flow"](#)
- [Section F.10.4, "Item-Level Billing Information Process Flow"](#)
- [Section F.10.5, "Commitments and Pricing Agreements Process Flow"](#)

The following is the process flow for B2B checkout:

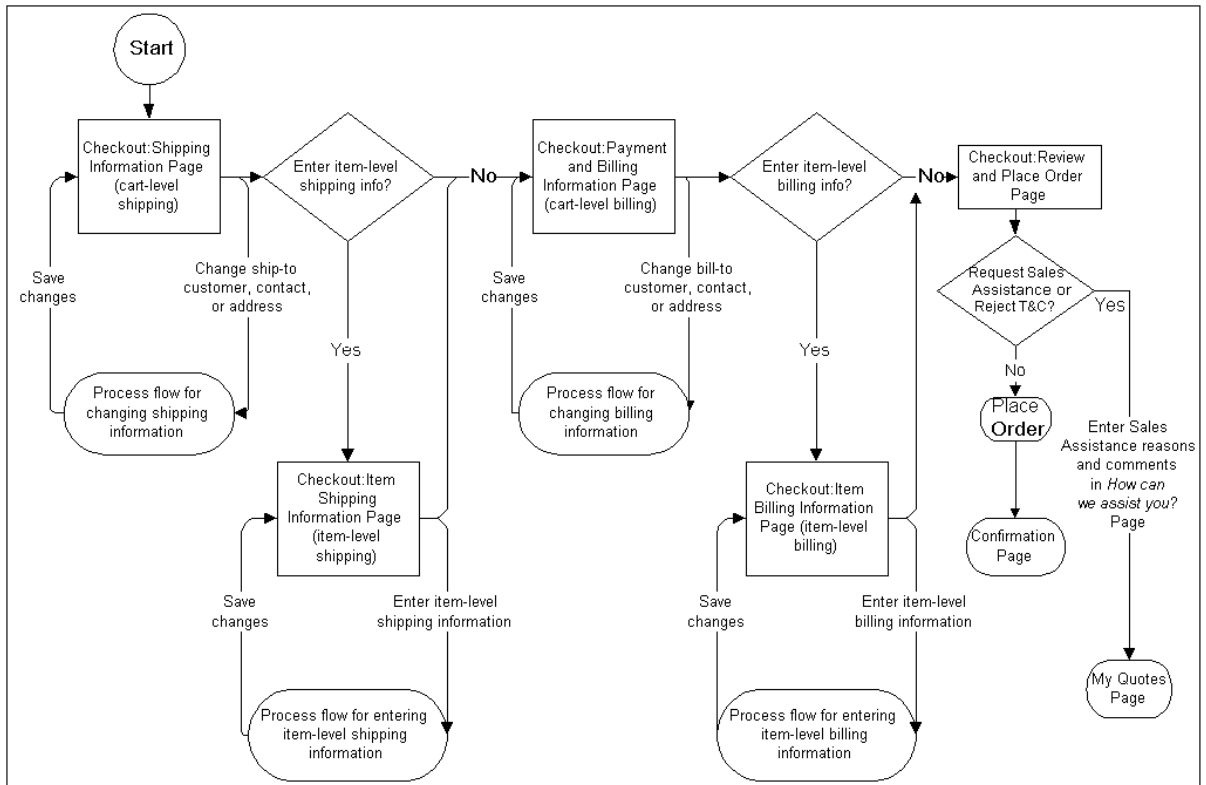
1. When B2B users proceed to checkout by pressing the Checkout button, they begin in the Checkout: Shipping Information page, where they enter cart-level shipping information using the [B2B Shipping Information Process Flow](#) page flow. Note that B2B users must have the `IBE_CHECKOUT` permission to access the Checkout button.
2. B2B users specify whether they wish to enter item-level shipping information by answering Yes or No to a question in the Checkout: Shipping Information page -- if they answer No, they continue to the Checkout: Payment and Billing Information page.
3. If they answer Yes to the enter item-level shipping information question, they continue to the Checkout: Item Shipping Information page and use the [Item-Level Shipping Information Process Flow](#) process flow.
4. When they finish entering the item-level shipping information, they return to the Checkout: Item Shipping Information page and then continue to the Checkout: Payment and Billing Information page.
5. In the Checkout: Payment and Billing Information page, B2B users enter cart-level payment and billing information for the order using the [B2B Billing Information Process Flow](#) page flow.
6. B2B users specify whether they wish to enter item-level billing information by answering Yes or No to a question in the Checkout: Billing Information page -- if they answer No, they continue to the Checkout: Review and Place Order page.

If B2B users choose Invoice or Cash as the payment method and do not enter a purchase order number, then they can also specify whether they need to enter item-level billing information.

7. When they answer Yes to the enter item-level shipping information question, they continue to the Checkout: Item Billing Information page and use the [Item-Level Billing Information Process Flow](#) page flow.
8. When they finish entering the item-level billing information, they return to the the Checkout: Item Billing Information page and then continue to the Checkout: Review and Place Order page.
9. In the Checkout: Review and Place Order page, B2B users can place the order by selecting the Place Order button. Note that B2B users must have the [IBE\\_CREATE\\_ORDER](#) permission in their user role to access the Place Order button.
10. If users request sales representative assistance in the Checkout: Review and Place Order page, they must select a reason for requesting assistance and optionally can enter comments in the *How can we assist you in finalizing your order?* page. If the cart is unsaved, the user must enter a cart name. After submission, the cart becomes a quote on the My Quotes page. Note that B2B users must have the [IBE\\_ASK\\_SALES\\_ASSISTANCE](#) permission in their user roles to be able to request sales assistance.
11. The users also can review/reject terms and conditions from the Checkout: Review and Place Order page.
12. After placing the order, users can select Continue Shopping to browse the specialty sites and potentially add more items to shopping carts.

The following diagram, [Figure F-10, "Process Flow for B2B Checkout"](#), illustrates this flow.



**Figure F–10 Process Flow for B2B Checkout**

### F.10.1 B2B Shipping Information Process Flow

B2B users can change and create the ship-to user, contact, and address for an order at checkout, if they have the required permissions.

1. In the Checkout: Shipping Information page and the Checkout: Update Item Shipping Information pages, B2B users (with the required user role permissions) can change the ship-to user, contact, or address.
2. If B2B users choose to change the ship-to user, the Search and Select: Ship to Customer page is displayed, where users can search for and select from a list of other ship-to users within their organization. When finished, they return to the Checkout: Shipping Information page.

Users with the required user permissions can also create a new ship-to user from the Search and Select: Ship to Customer page. In this case, the Create Customer page is displayed, where users enter information to create the ship-to user. When finished, they return to the Checkout: Shipping Information page.

3. If B2B users choose to change the ship-to contact, the Search and Select: Ship to Contact page is displayed. In the Search and Select: Ship to Contact page, users can search for and select another ship-to contact from within their organization. When finished, they return to the Checkout: Shipping Information page.

Users with the required user permissions can also create a new ship-to contact from the Search and Select: Ship to Contact page. In this case, the Create Contact page is displayed, where users enter information to create the ship-to contact. When finished, they return to the Checkout: Shipping Information page.

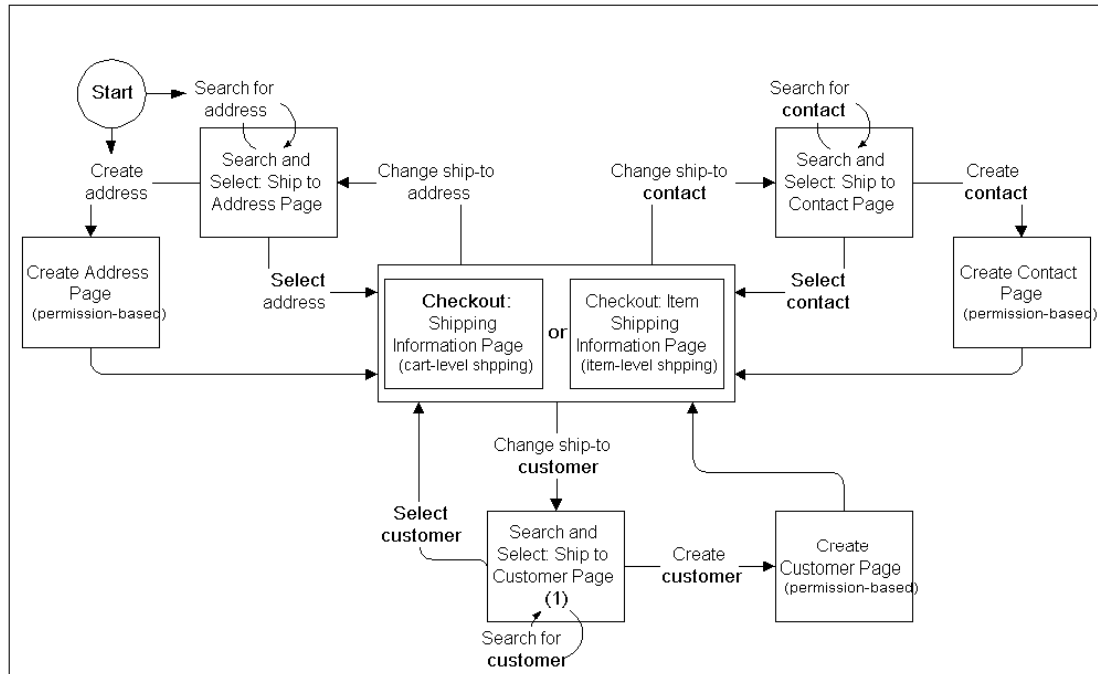
4. If B2B users choose to change the ship-to address, the Search and Select: Ship to Address page is displayed. In the Search and Select: Ship to Address page, users can search for and select a ship-to address. When finished, they return to the Checkout: Shipping Information page.

Users with the required user permissions can also create a new ship-to address from the Search and Select: Ship to Address page. In this case, the Create Address page is displayed, where users enter ship-to address information. When finished, they return to the Checkout: Shipping Information page.

5. When finished with the shipping information entry, users press Continue Checkout to continue to the Checkout: Payment and Billing Information page.

See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for permissions details.

The following diagram, [Figure F–11, "Process Flow for Changing B2B Shipping Information"](#), depicts this flow.

**Figure F-11 Process Flow for Changing B2B Shipping Information**

## F.10.2 Item-Level Shipping Information Process Flow

During checkout, users can enter separate shipping information for different items in their shopping carts, if the administrator has enabled this ability (see [Section 11.7.5, "Allowing Item Level Shipping Methods"](#)).

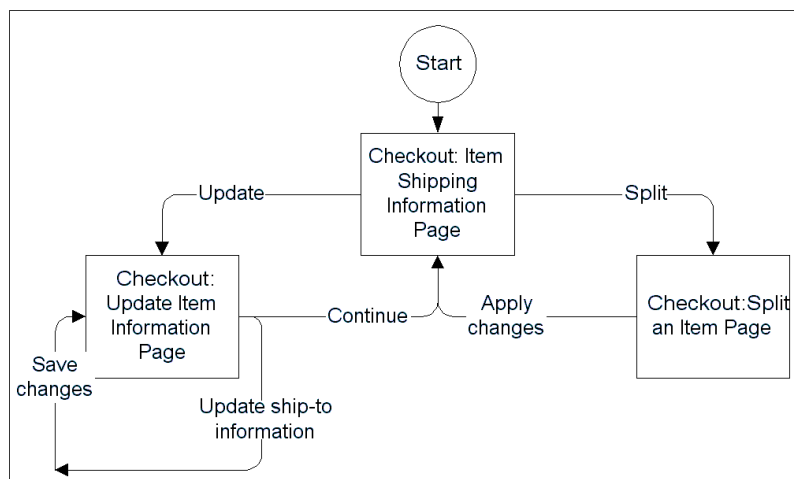
1. From the Checkout: Shipping Information page, B2B users can enter separate shipping information for different items in their shopping carts after selecting Yes to the item-level shipping question.
2. To update the shipping details of a specific item, users select the item and press the Update Item Shipping Details button -- this retrieves the Checkout: Update Item Shipping Information page for the item selected. From the update page, users can: (1) select a new shipping method; (2) change ship-to user, contact, or address, providing they have the required user role permissions; and (3) enter shipping instructions, if this functionality has been enabled (see [Section 11.7.6,](#)

"Allowing Users to Enter Shipping Information"). When finished, the users return to the Checkout: Item Shipping Information page.

3. If a user has ordered more than one quantity of a single item, the items can be split to specify different shipping information for each duplicate item. From the Checkout: Item Shipping Information page, users select the Split button to retrieve the Checkout: Split an Item page. When they finish splitting the line item, they return to the Checkout: Item Shipping Information page -- with the item split into different rows on the page. From this page, the user can modify the shipping information as described above.
4. When finished changing item-level shipping information, the users return to the Checkout: Shipping Information page.
5. Users press Continue Checkout to enter the billing information phase.

The following diagram, [Figure F-12, "Process Flow for Item-Level Shipping Information"](#), shows the flow.

**Figure F-12 Process Flow for Item-Level Shipping Information**



### F.10.3 B2B Billing Information Process Flow

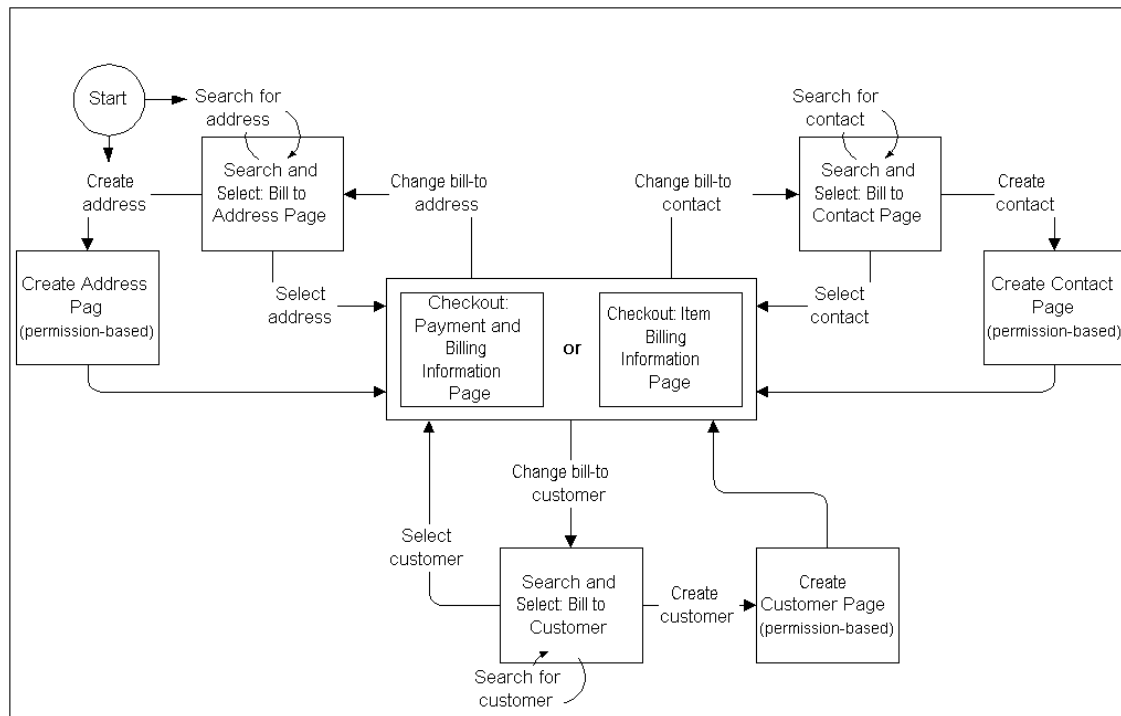
B2B users can change and create the bill-to user, contact, and address at checkout if they have the required permissions.

1. In the Checkout: Payment and Billing Information page and the Checkout: Item Billing Information page, B2B users can choose to change the bill-to user, contact, or address, depending upon their user role permissions.
2. If B2B users choose to change the bill-to user, the Bill to Customer page is displayed, where they can search for/select or create a new bill-to user. If B2B users choose to create a new bill-to user, the Create Customer page is displayed. When finished, they return to the Checkout: Payment and Billing Information page or the Checkout: Item Billing Information page.
3. If B2B users choose to change the bill-to contact, the Bill to Contact page is displayed, where they can search for/select a or create a new bill-to contact. If B2B users choose to create a bill-to contact in the Bill to Contact page, the Create Contact page is displayed. When finished, they return to the Checkout: Payment and Billing Information page or the Checkout: Item Billing Information page.
4. If B2B users choose to change the bill-to address, the Bill to Address page is displayed, where they can search for/select or create a new bill-to address. If B2B users choose to create a bill-to address in the Bill to Address page, the Create Address page is displayed. When finished, they return to the Checkout: Payment and Billing Information page or the Checkout: Item Billing Information page.
5. Users continue to the Checkout: Review and Place Order page.

See [Section C.6, "Oracle iStore B2B User Permissions Descriptions"](#), for permissions details.

The following diagram, [Figure F-13, "Process Flow for B2B Billing Information"](#), illustrates this flow.

**Figure F–13 Process Flow for B2B Billing Information**



## F.10.4 Item-Level Billing Information Process Flow

During checkout, B2B users can enter separate billing information for different items in their shopping carts, if this functionality has been enabled (see [Section 11.5, "Setting up Item-Level Billing"](#)).

**Note:** Payment type must be Cash or Invoice to use item-level billing. Also, when using line level billing, Purchase Order is not supported.

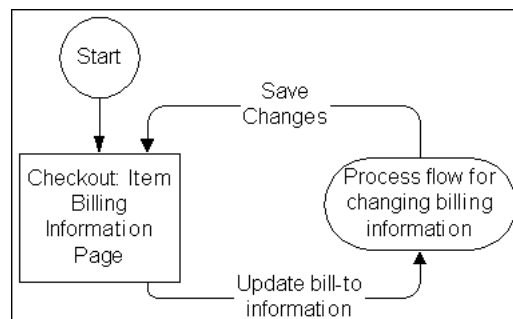
1. During checkout, from the Checkout: Billing Information page, B2B users can enter separate billing information for different items in their shopping carts, if this functionality has been enabled (see [Section 11.5, "Setting up Item-Level Billing"](#)).
2. The Checkout: Item Billing Information page displays, showing a list of items in their current shopping cart. From this page, users can update bill-to users,

contacts, and addresses for a specific item. Users must have the appropriate user permissions in their roles to access this functionality.

3. When finished, they return to the Checkout: Item Billing Information page. From this page, they continue with checkout and are returned to the Checkout: Payment and Billing Information page, where they continue with checkout.

The following diagram, [Figure F-14, "Process Flow for Item-Level Billing Information"](#), shows the flow.

**Figure F-14 Process Flow for Item-Level Billing Information**



## F.10.5 Commitments and Pricing Agreements Process Flow

When using commitments and pricing agreements at checkout, the user follows the page flow illustrated in the following diagram.

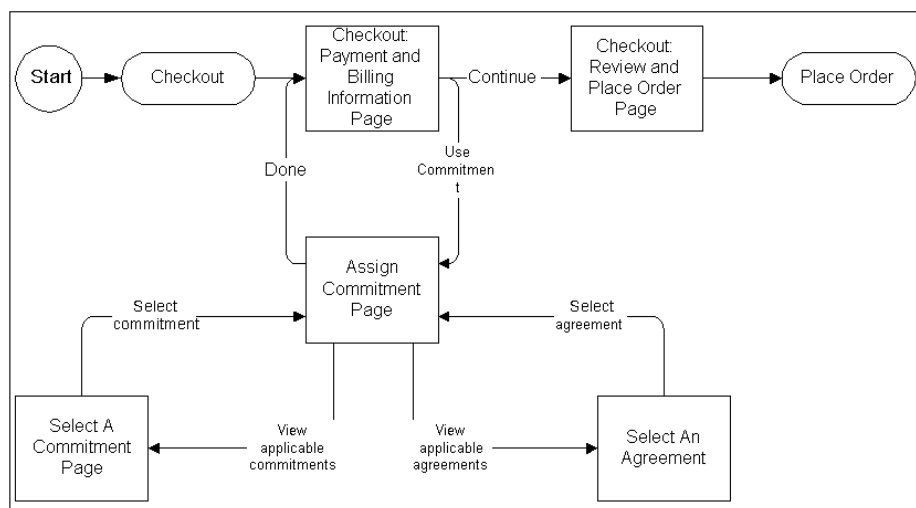
1. During checkout, a user enters payment and billing information. To use commitments, in the Checkout: Payment and Billing Information page, the user presses the Use Commitment button to select commitments at the item level. The Assign Commitments page displays each item.
  - a. For each item, the user can navigate to a Commitment List page that displays the applicable commitments. The applicable commitments are valid for the sold-to user. There are open commitments and those linked to the item. From the Commitment List page, the user selects a commitment to use for an item. If the commitment is linked to an agreement, that agreement is also automatically applied to the item.
  - b. For each item, if pricing agreements are enabled, the user can also navigate to an Agreements page that displays the applicable agreements. Here, the user selects a pricing agreement to apply to the item.

2. In both cases, the selected pricing agreement will also set the payment term and the price list for the cart item. The payment term and price list are specified during the setup of the pricing agreement.
3. When finished, the user returns to the Checkout: Payment and Billing Information page to continue cart checkout.

Implementing this functionality is described in [Section 10.5, "Pricing Agreements"](#). For information on commitments, see the *Oracle Receivables User Guide*.

The following diagram, [Figure F–15, "Process Flow for Checkout With Commitments"](#), depicts this flow.

**Figure F–15 Process Flow for Checkout With Commitments**



## F.11 Process Flow for B2C Checkout

B2C users who are ready to place their orders go to the checkout area of the site, where they enter shipping and payment information.

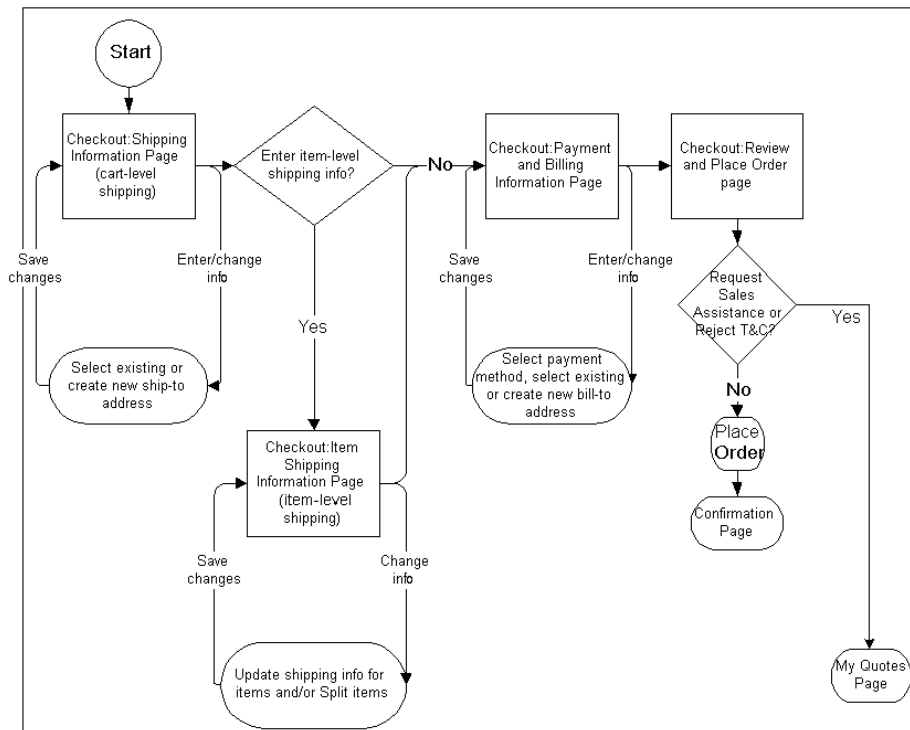
1. When a B2C user chooses to check out, the Checkout: Shipping Information page is the first checkout page displayed. The user chooses a shipping method, and can either select an existing shipping address or add a new address. Users also can enter shipping instructions, if this functionality has been enabled (see [Section 11.7.6, "Allowing Users to Enter Shipping Information"](#)).



2. Users can choose separate shipping details for different items in their carts. If they choose to use item-level shipping, the Checkout: Item Shipping Information page is displayed.
3. In the Checkout: Item Shipping Information page, users can update an item's shipping details by selecting the item and pressing the Update Item Shipping Details button. This retrieves the Checkout: Update Item Shipping Information page for the selected item. From this page they can enter different shipping information for the cart items, with the same options specified in step 1 above.
4. If users have entered more than one quantity for a single item in their carts, they can "split" the quantities to enter different shipping information for each one (with the same options explained in step 1 above). They do this by pressing the Split button from the Checkout: Item Shipping Information page.
5. Once finished entering shipping information, the users return to the Checkout: Shipping Information page.
6. Clicking Continue Checkout takes users to the Checkout: Payment and Billing Information page. The B2C user can enter the billing address and payment method here.
7. Clicking Continue Checkout starts the payment process and takes the users to the Checkout: Review and Place Order page.
8. From the review page, B2C users can update quantities, as well as change payment and shipping information.
9. In the Checkout: Review and Place Order page, B2C users can place the order by selecting the Place Order button.
10. If users request sales representative assistance in the Checkout: Review and Place Order page, they must select a reason for requesting assistance and optionally enter comments in the *How can we assist you in finalizing your order?* page. If the cart is unsaved, the user must enter a cart name. After submission, the cart becomes a quote on the My Quotes page.
11. The users also can review/reject terms and conditions from the Checkout: Review and Place Order page.
12. After placing the order, users can select Continue Shopping to browse the specialty sites and potentially add more items to shopping carts.

The following diagram, [Figure F-16, "Process Flow for B2C Checkout"](#), shows this flow.

**Figure F–16 Process Flow for B2C Checkout**



## F.12 Process Flow for User Account

Users can select the Profile, Orders, or Cart icons from any page to update their information, check on orders and invoices, work with shopping carts and shopping lists, or directly enter an item to purchase.

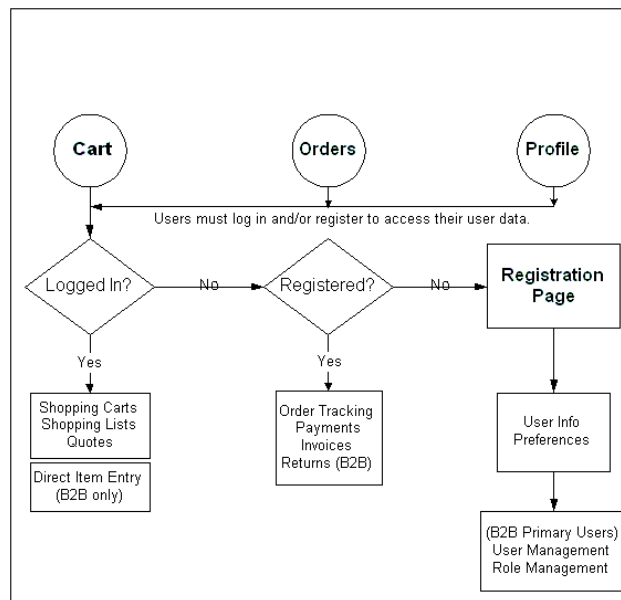
### F.12.0.1 Process Flow for User Account

1. Within the account menu, users can select the Cart icon to view their shopping carts and quotes; B2B users can use Direct Item Entry. See [Section F.6, "Process Flow for Shopping Lists"](#) to view the expanded diagram.
2. Users can select the Orders icon to view information about their orders, such as payment information and shipment tracking. See [Section F.14, "Process Flow for Order Tracker"](#) to view the expanded diagram.

3. Selecting the Profile icon takes users to user information (4.3) and the personal information page. See [Section F.13, "Process Flow for User Profile"](#) to view the expanded diagram.
4. B2B primary users can access the Administration menu where they can create and maintain other users for their organizations.

The following diagram, [Figure F–17, "Process Flow for User Account"](#), shows the flow.

**Figure F–17 Process Flow for User Account**



## F.13 Process Flow for User Profile

B2B and B2C users manage their own personal, address, and payment information using the Profile menu in the Customer UI. Note that the following flow covers the non-administrative user flow and assumes no other application integrations.

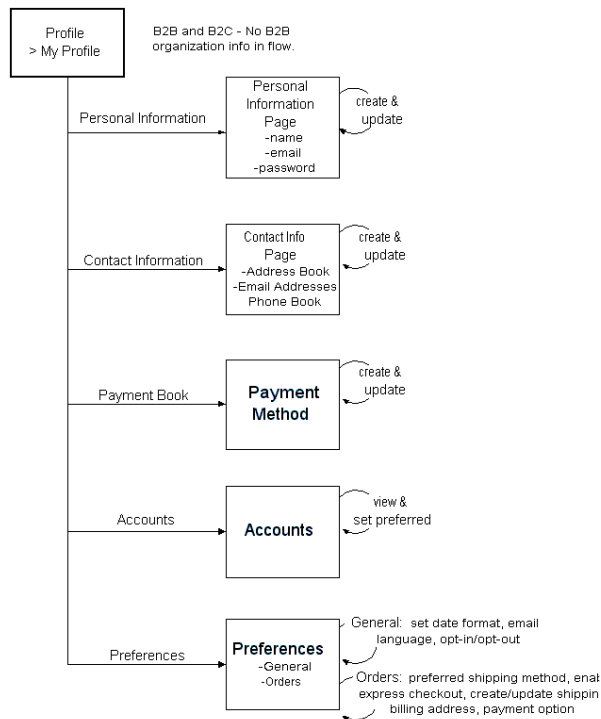
### F.13.0.2 Process Flow for User Profile

Note that this flow is for B2B and B2C. No organization information is included in the B2B flow.

When users select the Profile icon to edit their information, the My Profile subtab provides links to the following:

1. **Personal Information page** --- Users can enter/change their personal information, such as name, default e-mail address, and change their passwords.
2. **Contact Information page** --- Users can enter/change their addresses (Address Book link), e-mail addresses (Email Addresses link), and phone numbers (Phone Book link).
3. **Payment Book page** --- Users can set up a credit card to be used when ordering.
4. **Accounts page** --- Users can view available accounts and set the preferred account.
5. **Preferences page** --- In the General page, users can set preferred date format, preferred e-mail delivery language, and opt-in/opt-out of marketing communications. In the Orders page, users can: set such order preferences as preferred shipping method; enable Express Checkout (if Express Checkout is enabled by the administrator); create and update shipping addresses to be used with orders; create and update billing addresses to be used with orders; and enter a credit card number to be used with express checkout.

The following diagram, [Figure F-18, "Process Flow for User Profile"](#), shows the flow.

**Figure F–18 Process Flow for User Profile**

## F.14 Process Flow for Order Tracker

Users can select Orders to review their orders, invoices, payment, and returns.

See also: [Section 12.6, "Order Tracking"](#), and [Section 12.8, "Order Returns"](#)

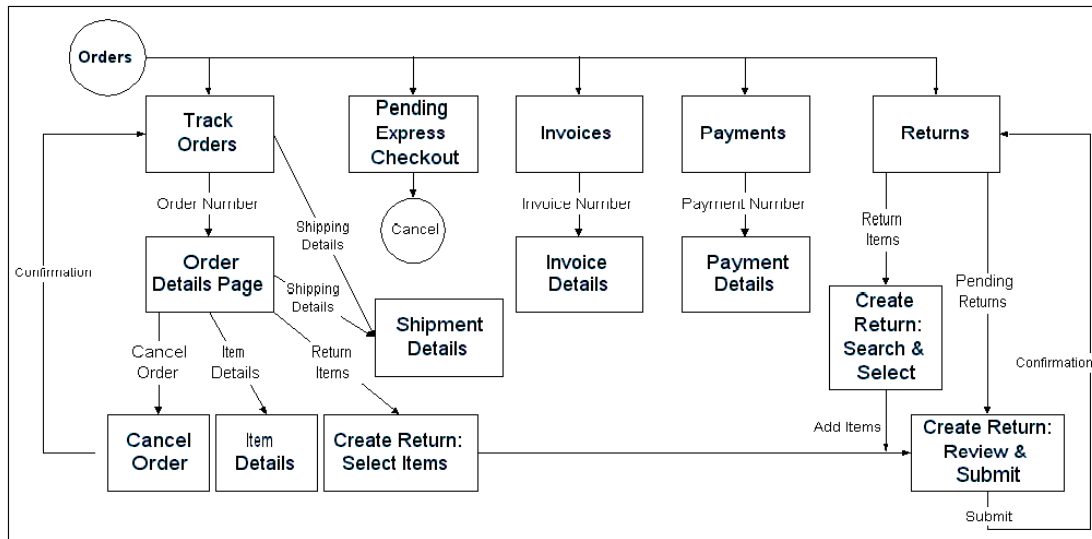
### F.14.0.3 Process Flow for Tracking Orders and Invoices

1. Users choose the Orders icon, and the Track Orders page displays summarized information about their orders. From this page, users can:
  - a. Search for orders.
  - b. Select Shipping Details icon to view shipment details.
  - c. Select an order number hyperlink to view the Order Details page.
2. From the Order Details page, users can:

- a. Select Cancel Order to cancel orders, if this functionality is enabled -- see [Section 12.7.1, "Order Cancellation Process Flow"](#).
  - b. Select Return Items to initiate the returns process, if this functionality is enabled -- see [Section 12.8.5, "Returns Process Flows"](#).
  - c. Select Details link for Shipping field to display shipping information -- see [Section 12.6.6, "Shipping Details in Order Tracker"](#).
  - d. Select Item Details icon --- Selecting the Item Details icon will display user-requested billing and shipping details -- see [Section 12.6.1.2, "Track Orders Subtab"](#).
  - e. View numerous order details -- see [Section 12.6.1.2, "Track Orders Subtab"](#).
3. If this functionality is enabled, users choose Pending Express Checkout to view a list of Express Checkout orders that have not yet been submitted by the concurrent program. If the orders have not yet been submitted, the user can press Cancel Order to cancel an order. See [Section 12.4.8, "Express Checkout"](#), for more information.
4. Users choose Invoices to view a list of their invoices, with payment and order information. From this page, users can:
  - a. Search for invoices.
  - b. Select the Invoice Number hyperlink to view the details for an invoice. See [Section 12.6.4, "Invoice Details in Order Tracker"](#), for more information.
5. Users choose Payments to view payment historical summary. From this page, users can:
  - a. Search for payments.
  - a. Select the Payment Number hyperlink to view details of specific payments. See [Section 12.6.5, "Payment Details in Order Tracker"](#), for more information.
6. Users choose Returns to review a table of submitted returns. From this page, users can:
  - a. Search for returns.
  - b. Select Pending Return to view a list of returns in the pending returns queue. See [Section 12.8.4, "Pending Returns Queue"](#), for details.
  - c. Select Returns Items to search for items to include in the return, and then initiate the returns process. See [Section 12.8.5, "Returns Process Flows"](#), for more information.

The following diagram, [Figure F–19, "Process Flow for Order Tracker"](#), illustrates the flow.

**Figure F–19 Process Flow for Order Tracker**



## F.15 Sample User Registration Flows

This section contains the following user registration flows:

- [Section F.15.1, "Individual User Registration"](#)
- [Section F.15.2, "Business User Registration - New Organization"](#)
- [Section F.15.3, "Business User Registration - Existing Organization"](#)
- [Section F.15.4, "Registration in Combined Store-Support-Partner Implementation"](#)

See also:

- [Section 25.3.8.2, "Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation"](#)
- [Section 27.2.11, "Sample Oracle Partner Management User Registration Flows"](#)

**Note:** The registration pages are not displayed in a specific site context, since the target page of the registration depends on the selected user type and related responsibilities.

## F.15.1 Individual User Registration

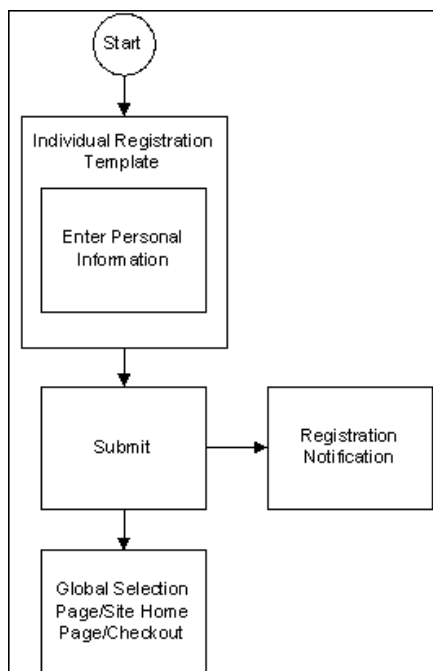
Following is a sample registration flow for individual users (B2C users). This flow assumes B2C users are automatically approved.

In the case of Oracle iSupport integration, the flow is the same, except that new users should be awarded Oracle iStore and Oracle iSupport individual user roles and responsibility.

1. From the Registration page, user selects the hyperlink to register as an individual user.
2. The user enters required information.
3. The user selects *Send me marketing communications* checkbox or not.
4. The user submits the registration form.
5. The user receives an e-mail notification with username and password information.

The following diagram, [Figure F-20, "Individual \(B2C\) User Registration Flow"](#), depicts the flow.



**Figure F–20 Individual (B2C) User Registration Flow**

## F.15.2 Business User Registration - New Organization

Following is a sample registration flow for business users (B2B users) whose organizations have not yet been registered. Typically, the first person to register his organization is considered the primary user and is charged with user management for business users within his organization. This flow assumes that the user will be automatically approved.

In the case of Oracle iSupport integration, the flow is the same, except that new users should be awarded Oracle iStore and Oracle iSupport primary business user roles and responsibility. See [Section 25.3.8.2, "Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation"](#).

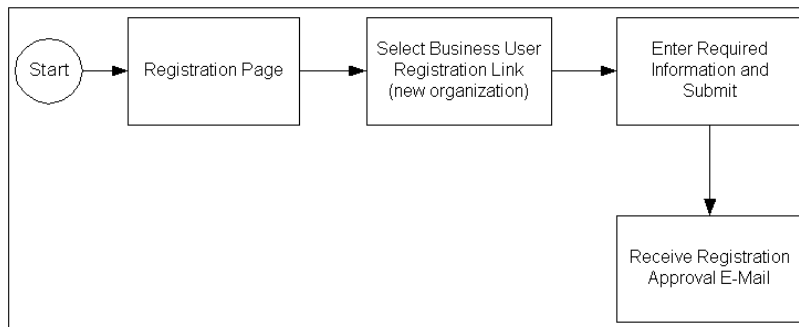
In case of Oracle Partner Management integration, the user would select the Oracle Partner Management link, *Register as a partner*. See [Section 27.2.11, "Sample Oracle Partner Management User Registration Flows"](#).

1. The user accesses the Registration page and selects the link to register as the first user of an organization.

2. The user enters required information.
3. The user submits the registration.
4. The user receives an e-mail notification that his registration has been approved. He can access the Profile > Organization Information area of the Customer UI to view his Organization ID/Registry ID and communicate it to other users.

The following diagram, [Figure F–21, "Business User \(B2B\) Registration Flow - New Organization"](#), depicts the flow.

**Figure F–21 Business User (B2B) Registration Flow - New Organization**



### F.15.3 Business User Registration - Existing Organization

Following is the registration flow for business users (B2B users) whose organization has already been registered. This flow assumes that a primary user must approve the B2B user's registration.

In the case of Oracle iSupport integration, the flow is the same, except that new users should be awarded Oracle iStore and Oracle iSupport business user roles and responsibility. See [Section 25.3.8.2, "Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation"](#).

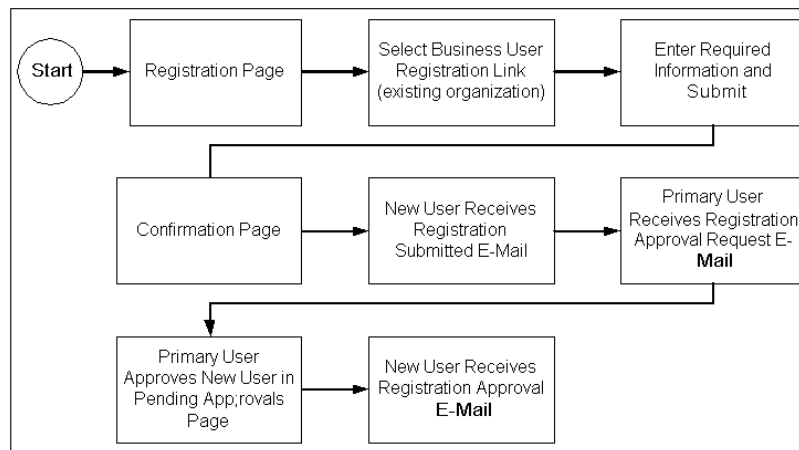
In case of Oracle Partner Management integration, the user would select the Oracle Partner Management link, *Register as a user of an existing partner*. See [Section 27.2.11, "Sample Oracle Partner Management User Registration Flows"](#).

1. The non-primary user accesses the Registration page and selects the link to register as user of an existing organization. The user should know his Organization ID/Registry ID before beginning registration.
2. The user enters required information, including Organization ID/Registry ID.

3. The user submits the registration.
4. The user receives an e-mail notification that his registration request has been submitted.
5. The primary user receives an e-mail notification that a self-registered user asked for approval.
6. The primary user approves the registration.
7. The non-primary user receives a notification that his registration is approved.

The following diagram, [Figure F-22, "Business User \(B2B\) Registration Flow - Existing Organization"](#), depicts the flow.

**Figure F-22 Business User (B2B) Registration Flow - Existing Organization**



## F.15.4 Registration in Combined Store-Support-Partner Implementation

Following is a sample registration flow a common implementation of Oracle iStore, Oracle iSupport, and Oracle Partner Management using Oracle iStore framework.

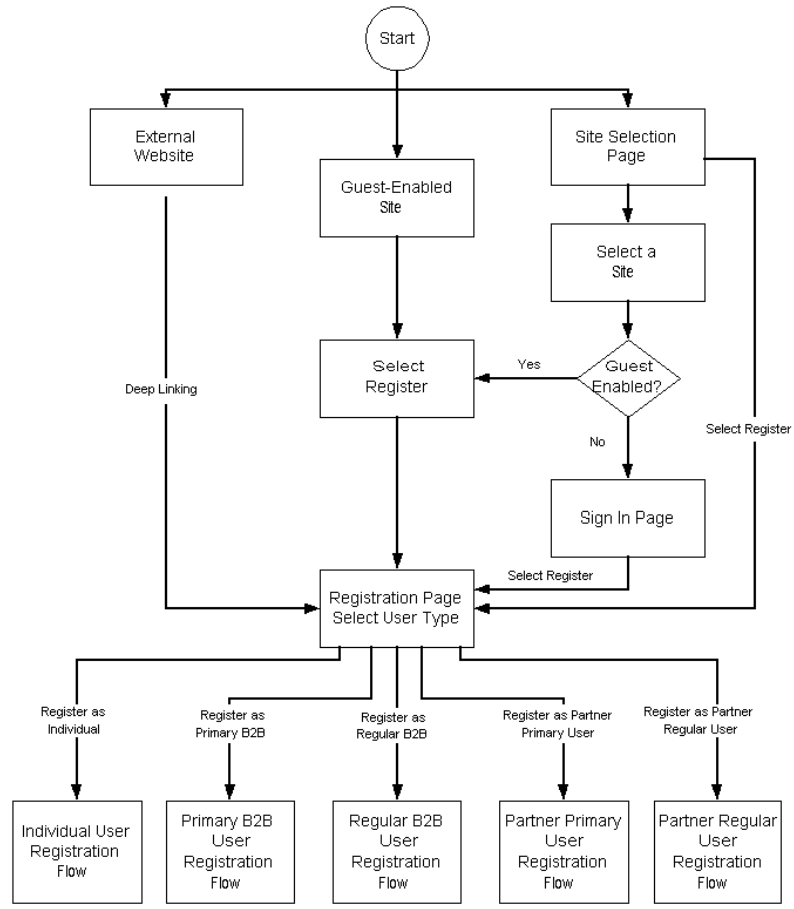
1. The user arrives at the registration page through one of the following paths:
  - From an external website, the user selects a deep link to the registration page.
  - The user navigates to the Site Selection Page and selects a site. If the site allows guest users, he is taken to the Site Home Page and can select the

Register icon. If the site does not allow guest users, he is taken to the login page, and from there can select the Register icon.

- The user navigates to the Site Selection Page and selects the Register icon.
  - The user accesses a site which allows guest users and selects the Register icon.
2. From the Registration page, the user selects the appropriate user type for which he is registering. Depending upon his user type selection, he follows one of the following registration flows:
- Individual user
  - Primary business user
  - Non-primary business user
  - Partner primary business user
  - Partner non-primary business user

The following diagram, [Figure F-23, "Registration in Implementation of Oracle iStore-iSupport-Partner Management"](#), depicts the flow.

**Figure F–23 Registration in Implementation of Oracle iStore-iSupport-Partner Management**





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