

Oracle® iStore

Quick Reference Guide

Release 11*i*

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Oracle iStore Quick Reference Guide, Release 11i

Part No. B13550-01

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Preface

Welcome to the *Oracle iStore Quick Reference 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 Quick Reference Guide* contains the information you need to understand and use Oracle iStore. This guide contains the following chapters and appendices:

- [Chapter 1, "Introduction to Oracle iStore 11i"](#), provides an overview of Oracle iStore features and concepts.
- [Chapter 2, "Site Administration Application"](#), describes the main features and functionality of Oracle iStore's administration user interface.
- [Chapter 3, "Customer Application"](#), explains the highlights of the customer-facing application.

- [Chapter 4, "Site Administration Quick Steps"](#), contains quick steps for common Site Administration Application procedures.

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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.
- **11i 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 Implementation and Administration Guide

This guide describes how to set up and use Oracle iStore.

Oracle iStore API Reference Guide

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

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.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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 Oracle*Metalink*

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.

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

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

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Introduction to Oracle iStore 11i

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

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

Topics in this chapter include:

- [Section 1.1, "Oracle iStore 11i Overview"](#)
- [Section 1.2, "Oracle iStore Overview and Key Features"](#)
- [Section 1.3, "New in this Release"](#)
- [Section 1.4, "Mandatory Integrations with Other Oracle Applications"](#)
- [Section 1.5, "Optional Integrations with Other Oracle Applications"](#)

1.1 Oracle iStore 11i Overview

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

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

Oracle iStore contains two user interfaces:

- **The Site Administration Application:**

The Site Administration Application allows site administrators to create and maintain multiple sites, catalogs, and related business rules, as well as access business and operational reports.

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

■ **The Customer Application:**

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

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

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

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

- Oracle Forms and HTML technology stacks
- Inventory management
- Flexible pricing
- Order processing
- Credit card authorization
- Configured items
- Human resource management
- Reporting
- Marketing
- Financials and procurement

Several of these possible integrations are discussed in [Section 1.4, "Mandatory Integrations with Other Oracle Applications"](#), and [Section 1.5, "Optional Integrations with Other Oracle Applications"](#).

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

1.2 Oracle iStore Overview and Key Features

Oracle iStore 11*i* allows businesses from all industries to establish business-to-business (B2B) and business-to-consumer (B2C) electronic commerce (e-commerce). Oracle iStore provides merchants with an easy-to-use interface for setting up specialty 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 11*i* are discussed in this section. Topics include:

- [Section 1.2.1, "Site Administration Application"](#)
- [Section 1.2.2, "Catalog Management"](#)
- [Section 1.2.3, "Content Management"](#)
- [Section 1.2.4, "Site Reports and Bins"](#)
- [Section 1.2.5, "Automated User Communications"](#)
- [Section 1.2.6, "Background Data Management"](#)
- [Section 1.2.7, "User Management, Self-Service Registration, and Customer Information"](#)
- [Section 1.2.8, "Globalization and Localization Support"](#)

- [Section 1.2.9, "Interactive Selling and Ordering Options"](#)
- [Section 1.2.10, "Order Management and Fulfillment"](#)
- [Section 1.2.11, "Marketing and Customer Tracking"](#)
- [Section 1.2.12, "Business Objects, Components, and Processes"](#)

1.2.1 Site Administration Application

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 Application.

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

- Create and maintain of any number of online specialty sites
- Easily duplicate and re-use sites, catalogs, and content
- In Preview mode, immediately preview the specialty sites
- Configure the display order of specialty site names as they are presented in the Customer Application
- Utilize the powerful search utilities that are present in each main page
- Integrate the Customer Application to support users of Oracle Partner Management and Oracle iSupport

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 terms
- Access restrictions
- Product and section exclusion rules
- Effective dates

1.2.2 Catalog Management

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

- A section hierarchy that can be as simple or complex as your business requirements necessitate. Sections are created in parent-child relationships. Products "hang" on nodes of the section hierarchy.
- Ability to control the browsing experience of the customer through section and subsection presentation.
- Cross-sell capabilities using the seeded Related items relationship, as well as support for a variety of other relationships between products, sections, and Inventory categories.
- A built-in search utility which allows you to locate a product by entering several criteria, including product name, number, category, description, as well as searching by sites that contain the product.
- 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 sections and products.
- Configurable bin layout for sections, allowing each section to have its own unique bin placement.
- Targeted catalogs in the form of specialty sites for unique customers.
- The ability to exclude products and sections from specific sites.
- Product autoplacement feature which allows the populating of sections with products through a single batch job.

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

1.2.3 Content Management

A Content Repository and reusable content components allow you to store, easily retrieve, and configure content to display in the specialty sites. Highlights include:

- Hundreds of configurable Display Templates present the Customer Application. This rich display environment presents a multitude of possibilities for altering the look and feel of the specialty sites.
- Within the Display Templates, bins can be configured for the tops, bottoms, and sides of the catalog, shopping cart, and registration pages.
- Re-usable content components and media objects.
- Easy-to-use interface for mapping source files to the media objects.
- Components and objects that are organized by type of display they effect.
- Display a single source file in any number of specialty sites.
- Easily mass-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.

1.2.4 Site Reports and Bins

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

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

- Section assignment and published/unpublished status reports

1.2.5 Automated User Communications

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

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

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

This functionality is provided through iStore's integration with Oracle Workflow.

1.2.6 Background Data Management

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

- Lead import concurrent program pulls customer data from orders and expired carts into database tables for use in other Oracle applications
- Product search concurrent program automatically populates necessary tables with product updates for use in the Customer Application product search
- Reports refresh concurrent program supplies automatic updates of transactional and operational data about the sites

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

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

- Ability to integrate with and provide registration and user management capabilities for users of Oracle iSupport and Oracle Partner Management applications.
- Business-to-consumer (B2C) functionality allows you to quickly launch an online presence to the buying public.
- Supplied integration with Oracle's customer data storage model, the Trading Community Architecture (TCA), provides the ability to maintain customer information and complex party relationships.
- Customer Profile functionality in the Customer Application allows users to maintain their own data. For the integrating applications Oracle iSupport and Oracle Partner Management, the Profile pages can be set up to support users of these applications.
- Ability to mandate the entry of B2B user contact information.
- Optional integration with Oracle Quoting allows interactive selling, quote publishing and updating, and online user assistance.

1.2.8 Globalization and Localization Support

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

- Global accounting through Oracle General Ledger allows you to set up multiple sets of books and business calendars.
- Oracle Multiple Organization Architecture gives you the ability to create and manage multiple organizations, inventory units, and warehouses internationally.
- Multiple currency support allows you to deploy sites --- with targeted products and prices --- in nearly any country and currency. Included is support for multiple-currency price lists.
- The globally-oriented Site Selection Page is the default landing page for the Customer Application. 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.

1.2.9 Interactive Selling and Ordering Options

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

- Sales assistance
- Online contract negotiation
- Collaborative quoting, including ability to turn on/off users' ability to update quotes
- Call-me-back functionality
- Sophisticated pricing, including multiple qualifiers and modifiers
- Shared shopping carts and quotes, and the ability to re-share carts and quotes
- Guided selling and product configuration online
- Product model bundles
- Support for selling serviceable items and related services
- Order tracking
- Order returns
- Opt in/opt out capabilities
- Real-time inventory checks and reservations
- Shopping lists
- Order cancellation
- Automatic e-mail notifications
- Express checkout

1.2.10 Order Management and Fulfillment

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

- Instant order transmission and fulfillment through Oracle Order Management
- Online automated payment processing through supplied integration with Oracle Order Capture
- Order cancellation abilities
- Order return abilities
- Optional integration with Oracle Financials applications can provide accounting support
- Order tracking, including the ability to view item-level invoice, shipping, and payment details
- Terms and Conditions support in the checkout pages, including the ability for Quoting sales representatives to alter Terms and Conditions contracts on-the-fly

1.2.11 Marketing and Customer Tracking

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

- Lead import functionality which allows the capture of valuable customer information from Oracle iStore shopping carts. Oracle Sales applications then can use the data in marketing efforts.
- Ability to post advertisements into Oracle iStore Customer Application bins, an option which leverages integration with Oracle Marketing.
- Customer event tracking and real time personalized recommendations through Oracle Marketing's integration with Oracle Personalization.
- Ability to create deep link advertisements to the iStore Customer Application in other web pages.

1.2.12 Business Objects, Components, and Processes

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

- **Business Objects** — The schema for representing and storing customers, orders, product catalog and presentation elements. These entities are persistent, shared across all Oracle applications, and manipulated by Java Application Programming Interfaces (API) provided within Oracle iStore's runtime services.
- **Runtime Services and APIs**—The coupling of certain common services available within all e-commerce applications (Oracle Foundation) and Java-based APIs (includes some PL/SQL APIs). This combination queries Oracle iStore's persistent storage of objects and relationships and enables update operations.
- **Configurable Customer Application templates** --- All Customer Application 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 specialty 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.
- **ADA Compliance** --- Oracle iStore meets the standards of Federal Law Section 508, Part 1194: Electronic and Information Technology Accessibility Standards.

1.3 New in this Release

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

Read-me information for this release can be found in the associated About Doc publication available on *OracleMetaLink*. To use *OracleMetaLink*, 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 *OracleMetaLink* for relevant product patches and documentation.

Topics include:

- [Section 1.3.1, "Extensible Self-Service Framework"](#)

- [Section 1.3.2, "Single Sign-on \(SSO\) Support"](#)
- [Section 1.3.3, "Display Template Mappings Import/Export"](#)
- [Section 1.3.4, "E-Mail Notifications Enhancements"](#)
- [Section 1.3.5, "Direct Item Entry Enhancements"](#)
- [Section 1.3.6, "Configurator Usage Support"](#)
- [Section 1.3.7, "Enhanced Collaborative Purchasing"](#)
- [Section 1.3.8, "User Access Control Improvements"](#)
- [Section 1.3.9, "Order Tracker Enhancements"](#)
- [Section 1.3.10, "Ability to Submit Returns"](#)
- [Section 1.3.11, "Support for Selling Serviceable Items with Services"](#)
- [Section 1.3.12, "Pricing and Promotion Improvements"](#)
- [Section 1.3.13, "Enhanced Oracle Personalization Integration"](#)
- [Section 1.3.14, "Enhanced Descriptive Flexfield Support"](#)
- [Section 1.3.15, "Oracle Quoting Integration Enhancements"](#)
- [Section 1.3.16, "Improved Terms and Conditions Functionality"](#)
- [Section 1.3.17, "Performance Enhancements"](#)
- [Section 1.3.18, "Accessibility Compliance"](#)

1.3.1 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 1.3.1.1, "Site Management Framework"](#)
- [Section 1.3.1.2, "Self-Service End-User Administration"](#)
- [Section 1.3.1.3, "Integrated Partner Portal"](#)
- [Section 1.3.1.4, "Integrated Support Portal"](#)
- [Section 1.3.1.5, "Dynamic Layout and Component Mapping"](#)
- [Section 1.3.1.6, "Enhanced Post Sales Support"](#)

1.3.1.1 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 the Implementing Site Management chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.1.2 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 the Implementing User Management chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.1.3 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 a to full web ordering system

- Maintain user registration, management, and storage of user information in self-service mode

See the Integrating Oracle iStore with Oracle Partner Management chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.1.4 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, management, and storage of user information in self-service mode

See the Integrating Oracle iStore with Oracle iSupport chapter in the *Oracle iStore Implementation and Administration Guide* for more information

1.3.1.5 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 mapping to child sections.

See the Implementing the Catalog chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.1.6 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 the Implementing Carts and Orders chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.2 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 the Integrating Oracle iStore with Oracle Single Sign-On chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.3 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 exported, altered offline, and then uploaded to any instance.

See the Advanced Display appendix in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.4 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 the Integrating Oracle iStore with Oracle Workflow chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.5 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 the Implementing Carts and Orders chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.6 Configurator Usage Support

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

See the Integrating Oracle iStore with Oracle Configurator chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.7 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 the Implementing Carts and Orders chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.8 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 the Implementing User Management chapter and the Seeded User Data appendix in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.9 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 order summary columns, including new documentation on how to change the attributes of several fields
- View order lines being shipped and fulfilled

See the *Implementing Carts and Orders* chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.10 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 the *Implementing Carts and Orders* chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.11 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 the *Implementing Products* chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.12 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 the Implementing Pricing chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.13 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 the Integrating Oracle iStore with Oracle Marketing chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.14 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 the Advanced Display appendix in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.15 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 the Integrating Oracle iStore with Oracle Quoting chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.16 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 the Integrating Oracle iStore with Oracle Sales Contracts in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.17 Performance Enhancements

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

- [Section 1.3.17.1, "Oracle 9iAS Web Cache Integration Enhancements"](#)
- [Section 1.3.17.2, "Search Performance Enhancements"](#)

1.3.17.1 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.
- **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 the Integrating Oracle iStore with Oracle 9iAS Web Cache chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

1.3.17.2 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, *No search has been performed*, when a search screen initially engages. Users can perform a search to retrieve some values. If no records are found, the *No records found* message displays.

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.

1.3.18 Accessibility Compliance

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

1.4 Mandatory Integrations with Other Oracle Applications

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

- **The Oracle Technology Stack** provides the fundamental technology stack for Oracle Application Object Library, Oracle Forms and Oracle E-Business Suite applications. The modules within the technology stack allow user creation and maintenance, application setups, and ways to customize the applications.
- **Oracle Receivables** calculates taxes and generates invoices. Bundled with the install of Oracle Receivables is the Oracle centralized data repository for customer information -- the Trading Community Architecture (TCA) model. Customer registration information is maintained in the TCA/Oracle Receivables schema.
- **Oracle General Ledger (GL)** provides business unit information to Oracle iStore. In it, you can define your accounting structure, business calendars, define and enable currencies, and manage your business units.
- **Oracle Human Resources Management System (HRMS)** stores information related to your organization. Use HRMS to set up employees and bill-to and ship-to countries.
- **Oracle Inventory** serves as the repository of products that can be sold through Oracle iStore.
- **The Oracle Order Management** suite of applications processes, records, and tracks customer orders and shipping details; allows you to set up basic pricing; allows setup of payment and shipping options; and can facilitate returned orders. Oracle Order Management integrates with Oracle iStore via Oracle Order Capture APIs and schema.

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

1.5 Optional Integrations with Other Oracle Applications

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

- **Oracle Advanced Pricing** --- Use Oracle Advanced Pricing to set up customer discounts, sourcing rules, pricing qualifiers, and pricing modifiers.
- **Oracle Advanced Supply Chain** --- Use Oracle Advanced Supply Chain (Global ATP Server) to provide product availability information.
- **Oracle Bills of Material** --- Use Oracle Bills of Material to set up configurable items, model bundles, and items with standard warranties for sale in your sites.
- **Oracle Call Center Technology** --- Use the Oracle Call Center Technology (CCT) suite of applications to process call-me-back requests.
- **Oracle Configurator** --- Use Oracle Configurator to enable customer configured products, provide guided selling, and perform some of the shopping cart validations.
- **Oracle Content Management** --- Oracle Content Manager (OCM) is an integrated content management system for Oracle's E-Business Suite. OCM provides content management building blocks and manages unstructured data through create, approval, publish, and release lifecycles. OCM has a central repository that manages folders, versions, and translations, and enables an organization to collaboratively work on content with associated workflows.
- **Oracle Customer Care** --- The Oracle Customer Care suite of applications provides a complete view of the customer by displaying relevant customer information. Customer Care allows agents to alter customer data and create interactions with the customer.
- **Oracle Contracts** --- Oracle Service Contracts can assist in providing support for selling serviceable items and their related services in the Customer Application, while the Oracle Sales Contracts module allows Terms and Conditions support in the checkout pages.
- **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. You also can integrate Oracle iStore specialty sites with Oracle iSupport to provide support for users of both applications.
- **Oracle Install Base** --- Use Oracle Install Base to maintain -- and allow customers to maintain -- a repository of purchase information, including

purchase date, product attributes, and applicable service agreements. Oracle Install Base maintains information about purchased products in a tree structure showing all of the parent and child assemblies.

- **Oracle Marketing** --- Use Oracle Marketing to define, execute, and manage marketing campaigns, budgets, and segments across all channels, and to define promotions and discounts. You also can use Oracle Marketing to allow the creation and management of Oracle Inventory products.
- **Oracle Partner Management** --- You can integrate Oracle iStore specialty sites with Oracle Partner Management to provide support for users of both applications.
- **Oracle Quoting** --- Use Oracle Quoting to create quotes that can be published to Oracle iStore web specialty sites and to capture carts as quotes when users request Sales Assistance.
- **Oracle Sales Applications** --- Use Oracle Sales Online and Oracle TeleSales to import sales leads from Oracle iStore orders and expired shopping carts.
- **Oracle Single Sign-On Server** --- Use Oracle Single Sign-On Server to provide single-authentication architecture.
- **Oracle Workflow** --- Use Oracle Workflow to send e-mail notifications and confirmations to customers and sales representatives.
- **Oracle9iAS Web Cache** --- Use Oracle9iAS Web Cache to serve the non-transactional Oracle iStore content.

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

Site Administration Application

In the Site Administration Application, Oracle iStore 11i administrators create and maintain sites and their catalogs and content, and access site reports.

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

Main topics in this chapter include:

- [Section 2.1, "Site Management"](#)
- [Section 2.2, "Customer Application Display"](#)
- [Section 2.3, "Content Management"](#)
- [Section 2.4, "Catalog Management"](#)
- [Section 2.5, "Business and Operational Reports"](#)
- [Section 2.6, "E-Mail Notifications"](#)
- [Section 2.7, "Background Data Management"](#)

2.1 Site Management

The Site Administration Application is a complete online store-building application. In Oracle iStore, stores are called *sites*. The Site Administration Application enables you to create and maintain any number of sites which you then publish to customers in the web application known as the Customer Application.

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

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

This topic's sections include:

- [Section 2.1.1, "Main Features of Sites"](#)
- [Section 2.1.2, "Oracle iStore Administrator"](#)
- [Section 2.1.3, "Preview Mode"](#)
- [Section 2.1.4, "Display Template Mappings Import/Export"](#)

2.1.1 Main Features of Sites

Main features of the site-building application include:

- **Site Management** --- The easy-to-use Site Administration Application is a complete site creation and maintenance application. Each site you create can have its own parameters and targeted customers. Comprehensive support is provided for Oracle iSupport and Oracle Partner Management application users as well.
- **Site Naming** --- You decide both the internal names and the display names of your sites. In the Customer Application site selection page, the display names are presented for customer selection. Each display name corresponds to an Oracle iStore customer responsibility, which is in turn mapped to a default operating unit. Oracle iStore can either automatically alphabetize this display list, or you can set the display order yourself.
- **Site Duplication** --- At any time, you can select a site and copy it. Duplicating a site means all associated parameters, catalog, and content also are available to the copied site.
- **Site Languages** --- Each site can support any language supported by the Oracle E-Business Suite. In addition to the base language, sites can support multiple other languages. The languages then are presented in the Customer Application as hyperlinks next to the site name. Users simply select the appropriate language to enter the site in the language of their choice.
- **Site Currencies and Price Lists** --- Any number of installed currencies and implemented price lists can be associated with a site, allowing you to sell your products in any country, and to provide product prices to different user segments. Oracle iStore also supports multiple-currency price lists, and several options are available for setting up pricing qualifiers and modifiers.

- **Shipping Methods** --- Each site can have its own shipping methods set up in the back-end Oracle Inventory application.
- **Payment Types** --- You can provide any type of payment option to your customers, which can then be processed in the back-end Oracle Order Management and Oracle Financials applications. Each site can have its own set of payment types. You can also provide automatic online authorization of credit cards in your online sites.
- **Payment Thresholds** --- The payment threshold feature allows you to set order amount thresholds for specific payment types. With this feature, orders over a certain amount offer specific payment type choices for the customer.
- **User Security** --- Oracle iStore contains security rules which tie each site uniquely to one or more customer responsibilities. You can decide whether to allow guest user access, or to restrict browsing only to registered users.
- **User Management** --- In the Customer Application, organizations registered in your sites can create and manage business users, utilizing the powerful storage capabilities of the Oracle Trading Community Architecture (TCA) model. Implementers can set up different segments of users and grant them specific roles and responsibilities. Automatic registration and application access also is supported out-of-the-box.
- **Site Groups** --- Oracle iStore allows administrators to organize sites into groups. The sites then display by group in the Site Selection Page and in the seeded group bins which can be mapped on catalog pages in the Customer Application. Three groups are seeded, the names of which are extensible lookups -- Stores, Support, and Partners.
- **Access Restrictions** --- You can set up access restrictions by organization; this allows you to restrict access to only users from a certain organization or organizations, or you can restrict users from certain organizations from accessing your sites.
- **Check Product Availability** --- For each site, you can provide customers with the ability to check product availability from the shopping cart.
- **Customer Data Capture** --- Oracle iStore's Lead Import functionality allows you to capture and re-use information from expired shopping carts and orders, and to potentially use them in Oracle Sales applications. Integration with Oracle Marketing's Event Capture means you can also capture some of the customers' browsing habits in your sites.

- **Global eCommerce Support** --- Oracle iStore supports a global product catalog and infrastructure, allowing you to launch and maintain an international online presence.

The iStore Administrator uses the Sites menu in the Site Administration Application to perform site creation and maintenance tasks.

2.1.2 Oracle iStore Administrator

The Oracle iStore Administrator is the user who creates and manages the sites in the Site Administration Application. The site administrator also has access to the notification messages and other advanced features, the catalog, products listings, and the content management features of the sites.

2.1.3 Preview Mode

Simply by selecting the Preview button in the application, site administrators can see how the sites will look to customers in the Customer Application. In Preview mode, all sites -- regardless of Published or Unpublished status -- can be previewed.

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

2.1.4 Display Template Mappings Import/Export

Oracle iStore's Display Template Mappings Import/Export functionality 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

See "Display Template Mappings Import and Export" in the Advanced Display appendix of the *Oracle iStore Implementation and Administration Guide* for complete details.

2.2 Customer Application 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 Application, 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 Application.

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

This section's main subsections include:

- [Section 2.2.1, "Display Templates"](#)
- [Section 2.2.2, "Section and Product Template Gallery"](#)
- [Section 2.2.3, "Bin Display"](#)
- [Section 2.2.4, "Images, Messages, and HTML Content"](#)

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

2.2.1 Display Templates

The bulk of the Customer Application 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 Application they are meant to display. For example, some templates display the shopping cart pages, some display the catalog pages, and other templates display the order tracking pages. Each template used in the online sites links to a JSP which provides the actual display content. By mapping your own JSPs to the seeded templates, you can provide your own customized content in the sites.

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

2.2.2 Section and Product Template Gallery

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

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

2.2.3 Bin Display

Oracle iStore's Display Template functionality allows you to map bins with specific JSP content into the top, bottom, and sides of the catalog, shopping cart, and registration pages. Section page bins can be configured in two ways -- using fixed layout, where every catalog section page 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 [Section 4.4.4, "Configuring Bins and Their Content"](#), for quick steps.

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

2.2.4 Images, Messages, and HTML Content

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

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

See [Section 4.4, "Content and Display Templates Quick Steps"](#), for quick steps.

See the Implementing Messages and Implementing Content chapters of the *Oracle iStore Implementation and Administration Guide*, for details.

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

2.3 Content Management

Oracle iStore comes with an extensive content management system which features reusable content placeholders known as content components and logical media

objects which map to source files. The seeded Display Templates contain programmatic access names used to call the seeded content components and media objects. Using content components and media objects, you can provide a wide variety of reusable content in the specialty sites.

Oracle iStore's Content Repository in the Site Administration Application utilizes the file system and database for storage. Advanced content integration is available through Oracle Content Manager as well.

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

This section's main subsections include:

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

2.3.1 Content Repository

The Content Repository in the Site Administration Application allows you to view and upload the source files used in your site pages. The Content Repository page lists the source files in your Content Repository, and allows you to preview the files. It also allows access to other pages where you can upload and update source files.

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

In the Content Repository page you can:

- View all source files that have been uploaded to the Content Repository
- Delete source files from the Content Repository
- Search for source files within the Content Repository
- Access the Upload/Update Source File pages, where you can upload source files for the repository

2.3.2 Content Components and Media Objects

Oracle iStore's content components and media objects are reusable content placeholders in the seeded JSPs that allow you to define content for the Customer Application beyond that provided by section or product description information.

This content can be image or html files that you associate with a section or product in order to provide your customers with additional information. It also can be text messages used to prompt or guide the user.

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

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

2.3.3 Optional Integration with Oracle Content Manager

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

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

Oracle Content Manager provides content management building blocks and manages unstructured data through create, approval, publish, and release lifecycles. Oracle Content Manager features a central repository that manages folders, versions, and translations, and enables an organization to collaboratively work on content with associated workflows.

Oracle Content Manager gives users a system with the essential tools required to create and manage any type of content, in the way that best suits their business needs. This powerful tool enables companies to produce consistent content that can be shared across internal and external customers.

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

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

2.4 Catalog Management

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

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

Topics in this section include:

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

2.4.1 Section Hierarchy

Oracle iStore's section hierarchy allows you organize your sites into logical sections connected in parent-child relationships, and to re-use these sections, their product associations, and their content in multiple sites.

In combination with the Display Templates, your site sections --- connected in a hierarchal fashion --- help determine the browsing path for the customer in your Customer Application 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 present your product catalog. Once you create a section, you can use it in any number of sites. You also can choose to exclude certain sections from sites.

Using the Sections pages, you can:

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

The majority of section creation and maintenance tasks are performed using the Sections pages accessible within the Catalog tab in the Site Administration Application.

2.4.2 Product Catalog

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

Oracle iStore ships with the capability to maintain a flexible product catalog, utilizing Oracle Inventory on the ERP side. As a part of maintaining the items (product) database, this includes the ability in the Site Administration Application to:

- View item details, such as name, number, and description
- Change item description information
- Set the Web Publish Inventory flag, which is identical functionally to the Published/Unpublished iStore flag
- Assign price lists that contain the products to sites
- Search for products
- Use the Product Autoplacement concurrent program to automatically populate and replace products in specified sections
- Set Display Templates at the product level -- Display Templates determine the layout of the page which displays the product in the Customer Application

2.4.2.1 Additional Products Functionality

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

- **Oracle Marketing's Products module** to provide wider product management capabilities, 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.
- **Oracle Bills of Material** to set up configurable items, model bundles, and items with standard warranties for sale in your sites.
- **Oracle Configurator** to enable --- in the Oracle iStore Customer Application --- customer-configured products, guided selling, solution-based modeling, and limited shopping cart validations.
- **Oracle Service Contracts** to enable the sale of serviceable items and their related services (e.g., extended warranties) in the Customer Application.
- **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.

The majority of product maintenance tasks are performed using the Products pages accessible within the Catalog tab in the Site Administration Application.

2.5 Business and Operational Reports

The Site Administration Application features pre-defined business and operational reports that capture and present valuable data about your sites and your customers.

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

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

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

Topics in this section include:

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

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

2.5.1 Reports Dashboard

The Oracle iStore Reports Dashboard pages within the Site Administration Application provide site administrators easy access to daily views of:

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

The page also displays three bins:

- Site Order Summary
- Unpublished Sections
- Unpublished Products

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

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

2.5.2 Business Reports

The business reports and bins include:

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

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

2.5.3 Operational Reports

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

2.5.3.1 Product Reports and Bins

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

Product exception reports and bins include:

- **Unassigned Products Report** --- This Discoverer-only report lists products not assigned to any section and created within a defined time period. Both Published and Unpublished products are reported.

- **Assigned Products Report** --- This Discoverer-only report lists products assigned to at least one section. Both Published and Unpublished products are reported.
- **Products by Site Report** --- This Discoverer-only report displays products assigned to at least one section, reported by site.
- **Products Excluded by Site Report** --- This Discoverer-only report lists products explicitly excluded from one or many site(s).
- **Unpublished Products Bin** --- This bin lists Unpublished products created within a specific number of days from current date. The number of days is specified by setting bin preferences. For quick steps, see [Section 4.5.2, "Setting Bin Preferences"](#).

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

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

2.5.3.2 Section Reports and Bins

Section exception reports and bins include:

- **Sections With Site Assignment Report** --- This Discoverer-only report lists sections assigned to at least one site, and the sites to which they are assigned. Users can filter sections by various criteria, such as the creation date range, section name, or section code.
- **Sections Without Site Assignment Report** --- This Discoverer-only report lists sections not assigned to any site. Users can filter sections by creation date range, section name, or section code.
- **Sections With Site Exclusion Report** --- This Discoverer-only report lists sections excluded from sites. In this report, only sections within the parent section of the selected site(s) are considered. Each site is mapped to a parent section in the catalog's section hierarchy. Users can filter sections by creation date range, section name, or section code.
- **Empty Sections Report** --- This Discoverer-only report lists sections with neither products nor sections published within them, across all sites. Users can filter sections by creation date range, section name, or section code.

- **Unpublished Sections Bin** --- This iStore Dashboard bin shows sections which have an Unpublished status, across all sites, created within a specific number of days from current date. The number of days is specified by setting bin preferences. For quick steps, see [Section 4.5.2, "Setting Bin Preferences"](#).

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

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

2.5.4 E-Mail Reports

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

- **Historical Summary Report** --- This is the Site Order Summary bin sent via e-mail with the number of orders and total sales amount (in currency) of all orders for selected time periods.
- **Daily Top N Orders Report** --- This e-mail notification provides the top 10 orders for the most recent day that the concurrent program was run. Note that the e-mail version of this report supports only *daily* order information, not weekly, monthly, etc.

See [Section 4.5.3, "Setting up E-mail Delivery for Reports"](#), for steps.

2.6 E-Mail Notifications

Oracle iStore provides more than 20 different notification events in which there are predefined e-mail messages. The notification e-mail messages are sent to users based on various events, including:

- User registration
- Login assistance requested
- Orders placed, 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.

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 Application.

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

2.7 Background Data Management

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

- **Reporting** --- The reporting series of concurrent programs allows the historical order summary and top orders reports to be delivered via e-mail, and loads reporting data into tables where it can be accessed by Oracle iStore Reports and Bins.
- **Customer Application Product Search** -- This series of concurrent programs populates search tables for the product search in the Customer Application.
- **Express Checkout** -- The express checkout concurrent program allows automatic submission of express checkout orders.
- **Lead Import** --- The lead import concurrent program sends customer data from Oracle iStore into tables that can be accessed by the Oracle Sales applications.
- **Product Autoplacement** --- This concurrent program automatically populates specific site sections with products from specific Inventory categories.
- **Template Mappings Import/Export** --- These concurrent programs allows you to export, edit parameters offline, and import the site-language mappings of your Customer Application templates.

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

Customer Application

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

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

Main topics in this chapter include:

- [Section 3.1, "Specialty Sites"](#)
- [Section 3.2, "Shopping Carts"](#)
- [Section 3.3, "Order Placement and Tracking"](#)
- [Section 3.4, "Users and Registration"](#)

3.1 Specialty Sites

After you build a site in the Site Administration Application and tie a customer responsibility to it, it becomes a *specialty site* in the Customer Application.

For more information, see the following sub-topics:

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

3.1.1 Specialty Sites Overview

After you construct them, specialty sites are listed on the default customer-facing landing page, the Site Selection Page. Customers select a specialty site to retrieve a specialty site's web pages.

3.1.1.1 Site Groups

In the Site Administration Application, administrators can use the site grouping functionality to organize specialty sites into groups. The site grouping functionality supports your integration with Oracle iSupport and Oracle Partner Management applications. Seeded groups include: Stores, Support, and Partners. These groups are presented in the Customer Application, allowing you to categorize your specialty site presentation by purpose or application. Additional groups can be created as well.

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

3.1.1.2 Site Selection Page

In the Site Selection Page, specialty site names display in alphabetical order, unless manually ordered by the iStore Administrator. In a multi-column layout of the Site Selection Page, hyperlinks automatically appear for each installed language. In a single-column implementation, a drop-list of available specialty sites is presented to the customer. You also can configure Oracle iStore to send customers to a specific home page of a specialty site.

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

3.1.1.3 Catalog, Carts, and Order Tracker

In the catalog, from the top level page of a specialty site, customers can browse through sections and their associated products, and ultimately add items to their shopping carts for checkout and purchase. At any time up to checkout, customers can share their carts with other users, in partner, B2B and B2C scenarios. Customers also can create shopping lists to store products. Following order placement, customers can track their orders, optionally cancelling orders or submitting return orders.

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

3.1.1.4 Configurable Display Templates

Hundreds of Display Templates that link to JSP files present the Customer Application's product catalog and section hierarchy. The product catalog and section hierarchy are built in the Site Administration Application. Oracle iStore installs with a complete set of templates for the Customer Application pages and related process flows. The template structure of Oracle iStore's Customer Application allows you to map your own JSPs to the templates (using the Site Administration Application) in order to provide a unique web page presentation. Seeded bins for the catalog, shopping cart, and registration pages allow you to present content along with top, bottom, and sides of these pages.

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

3.1.1.5 Logical Content Placeholders

All of the graphical elements on the web pages can be changed using the Site Administration Application's content components and media object functionality. For example, the logo shown on the Site Home Page can be mapped to any image you wish.

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

3.1.2 Catalog Pages Overview

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

Depending upon the configuration, the Site Home Page features:

- Product search functionality
- Tabs and subtabs derived from section names
- Section names and descriptions
- Product names and descriptions
- Product prices, including discounts
- Images at section or product level

- Add to Cart buttons
- Configure buttons for items set up through Oracle Configurator
- Support for bundle items set up through Oracle Bills of Material
- Navigational links for browsing, including a Browse Bin that displays all specialty sites and allows drill-down into site sections
- Several other bins, including a Welcome Bin, a Global (currency selection) Bin, and a specialty site selector
- Navigation icons that link to account management menus, allowing self-service administration of customers' accounts -- including carts, orders, and customer profile
- Drill-down links to product details

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

3.2 Shopping Carts

In Oracle iStore's Customer Application, shopping carts enable customers to store products that they may wish to purchase and then ultimately to purchase these items.

See the following sub-topics for more information:

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

3.2.1 Shopping Cart Key Features and Benefits

Oracle iStore shopping carts enable partner, B2B and B2C customers to:

- Add products to carts and then place an order
- Maintain any number of saved carts
- Share carts and quotes with other users, who then are allowed to re-share the carts and quotes
- Save products to shopping lists

- Use promotion codes, commitments, and pricing agreements
- Attach files to carts (B2B only)
- Add merchant-requested information to the cart through descriptive flexfield functionality
- Check the availability of items in inventory
- Configure items through guided selling and purchase model bundle items
- Add items to carts by entering part numbers directly (B2B only)
- Purchase serviceable items and their related services
- Request sales assistance and view or update published quotes

Note that some of these features require integration with other Oracle products. See [Section 1.4, "Mandatory Integrations with Other Oracle Applications"](#), and [Section 1.5, "Optional Integrations with Other Oracle Applications"](#), for more information.

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

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

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

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

3.2.2 Active, Saved, and Shared Shopping Carts

After they create them, customers can access saved or shared shopping carts in the My Carts page within the Cart menu. Carts are organized into the following areas of the page:

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

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

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

3.2.2.1 Saved Carts

Users can press the Save Cart button at any time to save a cart. The cart will be saved until it expires. Expiration timeframes can be specified by the merchant via a profile option. If customers do not explicitly save them, carts are system-saved and named.

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

From the Saved Cart Details page, users typically can:

1. **Activate the Cart** --- Users press the Update Cart or Checkout buttons to activate and then modify a cart. See [Section 3.2.2.3, "Active Carts"](#), for more information.
2. **Share the cart** --- Users press the Share Cart button to begin the process of sharing the cart. The Share Cart button only appears if the site administrator

has enabled this feature. See [Section 3.2.2.2, "Shared Carts"](#), for more information.

- 3. Checkout/Place Order** --- Users press the Checkout button to enter the checkout phase and place an order with the cart. See [Section 3.3, "Order Placement and Tracking"](#), for more details.
- 4. Delete the cart** --- Users press the Delete Cart button to delete the cart.
- 5. View Line Details** --- Users can select the Line Details icon to view a summary of each item's details. This icon only appears if specific item-level features are enabled.

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

3.2.2.2 Shared Carts

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

Cart sharing enables multiple users to make changes to a cart. The actions that a user receiving a shared cart (*cart member*) can perform depend on the role granted by the user initiating the cart sharing (*cart owner*). Customers with the required role can re-share carts with other users. Cart updates can be seen in real-time by all customers associated with the cart. The cart owner or a recipient with Administrator role can then place an order with the cart.

Automatically generated e-mail notifications and the ability to enter comments keep shared cart members informed of shared cart activities. Users sharing carts can selectively notify members on the cart. For example, when a cart member shares a cart, re-shares a cart, or changes members' access levels, the member can choose which recipients to notify about the changes, adding comments if desired. When the owner stops sharing a cart or an order is placed with a shared cart, all recipients are informed that the cart is no longer available.

To view the details of a shared cart, B2B users retrieve the Shared Cart Details page from the My Carts page, or select the URL hyperlink in the notification e-mails. B2B users must log in to view a shared cart. B2C users enter a cart retrieval number provided in the e-mail notification, or select the URL hyperlink in the notification e-mail.

The actions a user can perform from the Shared Cart Details page differs depending upon whether the user is the cart owner and which role he has been granted. See the Implementing Carts and Orders chapter of the *Oracle iStore Implementation and Administration Guide* for complete details.

3.2.2.3 Active Carts

Once the user activates the cart by pressing the Update Cart or Checkout buttons, the cart becomes the active cart. In the active cart, the customer can:

1. **Continue Shopping** --- Users can select the Continue Shopping button to continue browsing the web site and potentially add more items to the active cart.
2. **Save the cart** --- Users can select Save Cart to save and name the cart. See [Section 3.2.2.1, "Saved Carts"](#), for details.
3. **Delete items** --- Customers select the Delete icon, if desired, to remove items from the cart.
4. **Recalculate the cart** --- Users can select Recalculate button to recalculate the cart totals.
5. **Add Information** --- Users can select the Add Information link to enter item or cart-level information requested or offered by the site administrator. For example, users making purchases can be allowed to enter additional information about a product; this functionality leverages Oracle iStore descriptive flexfield support.
6. **Access Pricing Agreements** --- Users can select Pricing Agreements to associate pre-defined pricing agreement with the cart.
7. **Use Promotion Codes** --- Users can select Promotion Codes to enter pre-defined promotion codes.
8. **Add Attachments** --- B2B users can select Add Attachments to attach files to the cart.
9. **Check Product Availability** --- Users can select Check Availability to see if a product is available on their desired shipping dates.
10. **Share the cart** --- Users can select Share Cart to share the cart with other customers. This button only appears if the administrator has enabled the feature. See [Section 3.2.2.2, "Shared Carts"](#), for details.

11. **Save the cart as a list** --- Users can select Save to List to save the items in the cart to a shopping list. This button only appears if the administrator has enabled the feature. See [Section 3.2.4, "Shopping Lists"](#), for details.
12. **Checkout** --- Users can select Checkout to place the order. See [Section 3.3, "Order Placement and Tracking"](#), for more information.
13. **Express Checkout** --- Users can select Express Checkout to submit the cart as an Express Checkout order. This button only appears if the administrator has enabled the feature. See [Section 3.3.2, "Express Checkout"](#), for details.

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

3.2.3 Published and Shared Quotes

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

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

- **Quotes** --- Users' published quotes display here. See [Section 3.2.3.1, "Published Quotes"](#), for more details.
- **Shared Quotes** --- Users' shared quotes appear here, separated by type:
 - **Quotes Shared By You** --- Quotes the user is currently sharing with other users appear here.
 - **Quotes Shared With You** --- Quotes being shared with a B2B user display here.
 - **Quote Retrieval Textbox** --- B2C user enter the unique quote retrieval number in a textbox to retrieve shared quotes.

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

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

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

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

3.2.3.1 Published Quotes

One of the many features of Oracle Quoting is the ability for sales representatives to build and then publish quotes to Oracle iStore users in the Customer Application. In addition to originating as published quotes from Oracle Quoting, quotes also can be carts that have become quotes when a customer requests sales representative assistance during checkout -- see [Section 3.3.1.3, "Sales Representative Assistance"](#), for more information. Site administrators also can allow user updating of quotes in the specialty sites.

In the My Quotes page, users select the hyperlink of a published quote to retrieve the Quote Details page. In the Quote Details page, customers cannot alter quote information unless the site administrator has enabled the update quote feature. Non-updateable quotes can only have their payment information changed. Users can check out with a quote to place the quote's items as an order, or they can share the quote with other users. See [Section 3.2.3.2, "Shared Quotes"](#), and [Section 3.3, "Order Placement and Tracking"](#), for more information.

3.2.3.2 Shared Quotes

If the site administrator has enabled the share cart functionality, users can share and re-share quotes with others in a similar manner as they would share carts. See [Section 3.2.2.2, "Shared Carts"](#), for more details.

To share or re-share a quote, users press the Share Quote button from the Quote Details page, and then select recipients and roles for the recipients.

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

3.2.4 Shopping Lists

Shopping lists allow users to save items in shopping carts to lists, and then add the items in the list of the current active cart for checkout. Site administrators can turn the feature on/off by setting a profile option. Shopping lists are accessible in the My Shopping Lists subtab in the Cart menu in the Customer Application.

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

3.3 Order Placement and Tracking

Oracle iStore ships with full checkout, order placement, and order tracking capabilities in the Customer Application.

See the following sub-topics for more information:

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

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

3.3.1 Checkout and Order Placement

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

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

3.3.1.1 Shipping and Billing Information

In the Checkout: Shipping Information page, customers select shipping methods and select or enter address information. If the site administrator has enabled the functionality, shipping instructions and item-level shipping information also are available.

In the Checkout: Payment and Billing Information page, customers select payment types, select or enter billing address information, enter commitments (if enabled), and enter tax-exempt information. If the site administrator has enabled the functionality, B2B customers can enter item-level billing information.

Specific user permissions can be removed from B2B user roles in order to disable the address change and entry functionality.

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

3.3.1.2 Terms and Conditions

In the Review and Place Order page, customers can select the *review terms and conditions* hyperlink to review the terms and conditions of the standard contract (set up through Oracle Sales Contracts). If the customer rejects the terms and conditions, the cart becomes a quote in Oracle Quoting.

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

3.3.1.3 Sales Representative Assistance

If you have integrated Oracle iStore with Oracle Quoting and set up the Sales Assistance feature, customers can request sales assistance in the Review and Place Order page. If a user requests sales assistance in the checkout phase, the cart becomes a quote and the user's sales representative receives an e-mail notification of the request. The sales representative can then make changes to the quote and publish the changes to the customer in the Customer Application.

Specific user permissions can be removed from B2B user roles in order to disable the sales assistance functionality. The sales assistance feature can also be enabled/disabled using a profile option.

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

3.3.1.4 Placing the Order

When the customers have completed the information entry process, they press the Place Order button in the Review and Place Order page to commit the order. In a typical implementation, Oracle iStore submits the order to Oracle Order Management. Specific user permissions can be removed from B2B user roles in order to disable the checkout and place order functionality.

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

3.3.2 Express Checkout

Available for all registered users and controllable by a profile option, Express Checkout allows orders to be submitted as batch jobs through a concurrent

program. Oracle iStore automatically places the orders, depending on how often the concurrent program is run.

Customers must enable Express Checkout and set up their Express Checkout preferences before they can use the feature. Site administrators can enable/disable Express Checkout simply by setting a profile option. Once enabled, in the Oracle iStore Customer Application, the Express Checkout preferences link appears in the Welcome bin, and the Express Checkout Preferences page is available through the Profile menu. An Express Checkout button also appears in the catalog and shopping cart pages.

3.3.3 Order Tracking, Cancellation, and Returns

Once an order is submitted in an Oracle iStore specialty site, customers can log into the specialty site and access their order details by selecting the Orders icon. Customers also can cancel or return orders, if this functionality has been enabled.

3.3.3.1 Order Tracking

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

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

For B2B customers, only orders belonging to their current organization display. The ability to see orders across an organization can be removed through a permission supplied in the seeded B2B user role.

3.3.3.2 Order Cancellation and Order Returns

Oracle iStore allows partner, B2B and B2C users to cancel orders and return orders. These features are enabled by setting up the back-end applications and enabling them through profile option settings. In addition, by revoking specific user permissions in the seeded B2B user role, this functionality can be removed for specific users.

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

3.4 Users and Registration

Oracle iStore features support for multiple user types, self-service customer registration, storage of personal customer data, and comprehensive B2B user management functionality. Full support is provided for users of Oracle iSupport and Oracle Partner Management.

Refer to the following topics for more information:

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

3.4.1 User Types and Access

Through its comprehensive user registration and management framework, Oracle iStore supports several customer user types, including:

- Guest users
- Business-to-business (B2B) users of Oracle iStore and Oracle iSupport
- Business-to-consumer (B2C) users of Oracle iStore and Oracle iSupport
- B2B primary (administrative) users of Oracle iStore and Oracle iSupport
- Business partner regular B2B users and primary users of Oracle Partner Management

Access to the specialty sites is controlled through the use of *responsibilities* and -- in the case of B2B users -- by associating *roles* with the users. Responsibilities and roles are awarded during registration by implicit enrollments. Various approval processes can be defined, depending upon your business requirements.

For more information, see the *Oracle iStore Implementation and Administration Guide*, *Implementing Users and Registration* chapter, and the *Oracle Applications CRM System Administrator's Guide* User Management documentation available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

3.4.2 User Registration

Typically, Oracle iStore users register in the New User Registration page in the Customer Application. B2B users select the option to register as a member of an organization, while B2C customers register as individuals. If integrating with Oracle iSupport, these users also utilize the Oracle iStore B2B and B2C user registration links. If integrating with Oracle Partner Management, users select the primary partner and regular business partner registration links provided on Oracle iStore's registration page.

While registration templates and related processing templates are provided by Oracle iStore, setup of registration approval processes is done in the Oracle Applications CRM System Administrators Console.

Following registration, users are either automatically approved or go through an approval process, depending upon your setup.

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

For more information, see the *Oracle iStore Implementation and Administration Guide*, Implementing Users and Registration chapter, and the *Oracle Applications CRM System Administrator's Guide* User Management documentation available on [OracleMetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>).

Note that you also can integrate Oracle iStore with Oracle Single Sign-On Server for user authentication. See the Integrating Oracle iStore with Oracle Single Sign-On Server chapter of the *Oracle iStore Implementation and Administration Guide* for more information.

3.4.3 B2B User and Role Management

Organizations can utilize the B2B role functionality to specify granular permissions for these users. Oracle iStore ships with numerous user permissions, allowing site administrators to configure which user interface components and functionality B2B users are allowed to access.

Once an organization's primary user (or users) has been set up, this B2B user can serve as the user management administrator. Primary users can create users within their organization, assign roles, and reset passwords. Permissions in their user role allow them to access Oracle iStore's user management functionality in the Customer Application Profile menu. The Profile menu also supports users of Oracle iSupport and Oracle Partner Management.

For example, there are permissions which control:

- Access to list prices vs. net and discount prices
- Requesting sales assistance
- Placing order capabilities
- Viewing orders across an organization
- Viewing the Checkout button
- Creating bill to customers, contacts and addresses
- Creating ship to customers, contacts, and addresses
- Creating sold to customers
- Changing bill to contacts and customers
- Changing ship to contacts and customers
- Allowing customers to bill to or ship to other accounts
- Creating returns
- Viewing returns across an organization
- Cancelling orders

A complete list of the Oracle iStore B2B permissions can be found in the Seeded User Data appendix in the *Oracle iStore Implementation and Administration Guide*.

3.4.4 Storage of User and Company Information

For the convenience of Customer Application users and organizations, Oracle iStore allows users and organizations to store their personal and company data, and to manage this data in a self-service fashion. All user and company data is stored in the Oracle Trading Community customer model, allowing consistent and accurate display of data across the Oracle E-Business Suite.

Self-service management of user and company information is allowed through the Profile menu in the Customer Application. Users can maintain several billing and shipping addresses (along with associated telephone, fax, and e-mail data) and specify whether an address is a preferred billing or shipping address. Payment information can be stored as well, allowing Oracle iStore to automatically default this information into shopping carts. Organizations can store and present for their users information about the company, such as contact information, annual revenue, web site address, and more.

Oracle iStore defaults users' preferred shipping and billing information into the cart during the checkout phase. When customers place the order, the addresses used in the order are populated into Oracle Receivables, Oracle Order Management, and other ERP modules. Full Profile support is provided for users of Oracle iSupport and Oracle Partner Management applications.

3.4.5 Opting In or Out

Several Oracle applications --- such as Oracle Sales Online and Oracle TeleSales --- can send marketing communications to customers whose contact information is captured by Oracle iStore. In the registration, Profile, and checkout pages, Oracle iStore captures customer addresses and other personal data, and this data can be used for marketing purposes.

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

Site Administration Quick Steps

This chapter contains quick steps for common administrator procedures in the Site Administration Application.

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

Main topics in this chapter include:

- [Section 4.1, "Site Creation Quick Steps"](#)
- [Section 4.2, "Sections Quick Steps"](#)
- [Section 4.3, "Products Quick Steps"](#)
- [Section 4.4, "Content and Display Templates Quick Steps"](#)
- [Section 4.5, "Reports Quick Steps"](#)

4.1 Site Creation Quick Steps

Topics in this section include:

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

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

4.1.1 Starting Site Creation

Use the following procedure to begin site creation. All fields can be altered after the site is saved.

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

Steps

1. Log into the Site Administration Application and navigate to Sites > Create a Site to launch the Create Site page.
2. Enter basic information for a site:
 - a. **Site Name** --- Enter a name for the site in the textbox. This should be your company's internal name by which the site is known.
 - b. **Site Code** --- Once entered, this code is unique across sites in all instances implemented, and can be used in the Template Mappings Import/Export functionality.
 - c. **Description** --- Enter a description for the site. You can enter this at a later time if you wish.
 - d. **Start Date** --- Use the calendar icon to select the date when the specialty sites of this site should first be active and available to customers in the Customer Application. This will default to system date.
 - e. **End Date** --- Optionally, use the calendar icon to select the date the specialty sites of this site should no longer be active and available to customers in the Customer Application.

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

- f. **Default Language** --- Select the default language for the site. This step is expanded in [Section 4.1.2, "Setting Site Languages"](#).

Except for the default language known as the *base language*, languages must first be installed and then set up in Oracle Applications before they appear in the Site Administration Application.

- g. Default Currency** --- Select default currency. This step is expanded in [Section 4.1.3, "Setting Site Currencies"](#).
- h. Default Walk-in Price List** --- Select the default price list for walk-in (guest) users of the site. This step is expanded in [Section 4.1.4, "Setting Site Price Lists"](#).
- i. Catalog Root Section** --- **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 (only contains 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 thisSee the Implementing Catalog chapter of the *Oracle iStore Implementation and Administration Guide* for additional information.
- j. Allow un-registered users to browse the site** --- Select to allow unregistered users (guest/walk-in users) to navigate this site's specialty sites.
- k. Allow customers to check item availability** --- Select to allow users to check Available to Promise (ATP) information for products. Do not select this unless you have set up either Regular or Global ATP.
- l. Restrict customer access by responsibility** --- Select this checkbox to make all specialty sites within this site check user responsibility when customers enter the specialty site. If you select this, then specialty sites within this site will only grant access to those users whose responsibilities are supported by the specialty site.
- m. Enable Threshold for Payment Types** --- Select this checkbox to enable the Payment Threshold feature in all specialty sites within this site. This feature allows you to set a monetary amount and then set which payment types can

be used when users place orders below that amount. This step is expanded in [Section 4.1.11, "Setting Site Payment Threshold"](#).

3. Select Apply to save changes.

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

4. Continue creating your site using the following sections:
 - [Section 4.1.2, "Setting Site Languages"](#)
 - [Section 4.1.3, "Setting Site Currencies"](#)
 - [Section 4.1.4, "Setting Site Price Lists"](#)
 - [Section 4.1.5, "Setting Site Payment Types"](#)
 - [Section 4.1.6, "Setting Site Shipping Methods"](#)
 - [Section 4.1.7, "Setting Site Responsibilities"](#)
 - [Section 4.1.8, "Setting Site Display Name Order"](#)
 - [Section 4.1.9, "Assigning Site Groups"](#)
 - [Section 4.1.10, "Setting Site Access Restrictions"](#)
 - [Section 4.1.11, "Setting Site Payment Threshold"](#)

4.1.2 Setting Site Languages

Optional step -- To enable additional languages, you must first install and then set up the languages in Oracle Applications. In addition, your implementation must be multi-org enabled.

Steps

1. Log into the Site Administration Application and navigate to the Sites tab. Select a site and press Update to launch the Update Site: Details page.
2. Select Language to retrieve the Languages page displaying languages currently supported by the site.
3. **To add a language:** Select Add Language to launch the Select: Languages page, where you can choose additional, previously-installed languages.

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

4.1.3 Setting Site Currencies

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

Steps

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

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

For currency setup information, see the *Oracle General Ledger User's Guide*.

4.1.4 Setting Site Price Lists

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

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

Steps

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

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

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

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

4.1.5 Setting Site Payment Types

Select the payment types that the site will support. Payment types must first be set up in Oracle Applications before they can be selected in the Site Administration Application.

Steps

1. Log into the Site Administration Application and navigate to the Sites tab. Select a site and press Update to launch the Update Site: Details page.
2. Select Payment to retrieve the Payment Types page showing all payment types supported by this site.
3. **To add payment types:** Select Add Payment Type to retrieve the Select: Payment Types page where you can select the payment types this site will support.
4. Back in Payment Types page, select Apply to save changes.
5. Optionally, enable or disable the following checkboxes:
 - **Ask for Purchase Order** --- If checked, users can enter purchase order numbers during checkout for this 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.

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

4.1.6 Setting Site Shipping Methods

Assign the shipping methods supported by the site. Shipping methods must be set up before they will display in the Site Administration Application. Only the shipping methods supported by a site will display in the Customer Application.

Steps

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

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

4.1.7 Setting Site Responsibilities

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

- The responsibility of the user placing an order --- through the setting of the **MO: Operating Unit** profile --- determines the operating unit against which the order is placed.
- Each iteration of a site plus a responsibility makes a **specialty site** in the Customer Application.
- As a best practice, use **one responsibility per site**.
- Oracle iStore ships with a default responsibility for the Customer Application. This responsibility is `IBE_CUSTOMER`. When you create a site, Oracle iStore automatically maps this responsibility to the site; you can use the Responsibilities page to remove the mapping.
- Oracle iStore also supports using Oracle iSupport and Oracle Partner Management responsibilities in the Customer Application.

Steps

1. Log into the Site Administration Application and navigate to the Sites tab. Select a site and press Update to launch the Update Site: Details page.

2. Select *Responsibility* to retrieve the *Supported Responsibilities* page.
3. **To map a new responsibility to the site:** Select *Add Responsibility* to retrieve the *Search and Select: Responsibility* page where you can search for and select responsibilities.
Note: You can only use a single responsibility once per site.
4. **Enter Display Names:** In the *Responsibilities* page, in the *Site Display Name* field, enter a display name for each specialty site (site-responsibility combination) in the *Customer Application*.
5. **Enter Effective Dates:** In *Start Date* and *End Date* fields, enter dates when the site will support each responsibility you have added.
6. Press *Apply* to save changes.

4.1.8 Setting Site Display Name Order

Optional step -- Manually re-order display order of the specialty sites across all sites in your organization's implementation.

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

Steps

1. Log into the *Site Administration Application* and navigate to the *Sites* tab. Select a site and press *Update* to launch the *Update Site: Details* page.
2. Select *Responsibility* to retrieve the *Supported Responsibilities* page.
3. Select *Display Order* to retrieve the *Display Order* page. Use windows to select display order.
4. Press *Apply* to save changes.

4.1.9 Assigning Site Groups

Optional step -- Group specialty sites into one of three seeded categories.

Steps

1. Log into the *Site Administration Application* and select the *Sites* tab. Select a site and press *Update* to launch the *Update Site: Details* page.

2. Select the Responsibility hyperlink. The Supported Responsibilities page displays.
 3. Select the Assign Groups icon in the row of the specialty site you wish to place into a group. The Update Site: Assign Groups page opens.
 4. The Unassigned Groups and Assigned Groups windows display the groups available for assignment. Seeded values are:
 - **Stores** -- 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.
 - **Partners** -- You can use this group to contain all specialty sites you wish associated with Oracle Partner Management.
- If a group has been disabled, it will not appear in the page.
5. Use the right and left arrows to make the group assignments for this specialty site.
 6. Press Apply to save changes.

4.1.10 Setting Site Access Restrictions

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

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

- Restrict access to a 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 Application and navigate to the Sites tab. Select a site and press Update to launch the Update Site: Details page.
2. Select Access to retrieve the Access Restrictions page.
3. Select the appropriate radio button:
 - **No restriction:** Select to have no organization-related access restrictions on the site
 - **Exclude the following organizations:** Select to restrict access to the site by users associated with the organization(s) you specify

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

4.1.11 Setting Site Payment Threshold

Optional step -- Set payment threshold for a currency. 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.

Steps

1. Log into the Site Administration Application and navigate to Sites tab. Select a site and press Update to launch the Update Site: Details page.
2. Ensure that the Enable Threshold for Payment Types checkbox is active.
3. Navigate to the Pricing page by selecting the Pricing hyperlink. The Pricing page shows all currencies, price lists, maximum orderable amounts, and payment thresholds associated with a site.
4. For each supported currency, enter a monetary amount, in whole numbers, in the Payment Threshold textbox. When a user attempts to place an order whose amount is below this amount, Oracle iStore will display only the payment types whose Payment Threshold checkbox is active (see the next step, below).
5. Navigate to the Payment Types page by selecting the Payment hyperlink: In the Update Site page, select the Payment hyperlink. The Payment Types page will display all payment types currently supported by the site.
6. To enable the payment threshold functionality for a payment type, select the Use Below Payment Threshold checkbox next to the payment type in the table.

7. Press Apply to save changes.
8. Optionally, enable or disable the following checkboxes:
 - **Ask for Purchase Order** --- If checked, users can enter purchase order numbers during checkout for this 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.
9. Press Apply to save changes.

4.2 Sections Quick Steps

Topics in this section include:

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

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

4.2.1 Creating Sections

Use the following procedure to create a section:

Steps

1. Log in to the Site Administration Application and navigate to Catalog > Sections.

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

4.2.1.1 Deleting Sections

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

4.2.2 Duplicating Sections

When a section is duplicated, all subsections under the original section are duplicated. However, products, content, and templates referenced by the section are not copied, only the reference links are copied. If the original section from which the copy was made is deleted, Oracle iStore still can access the data.

Use the following procedure to duplicate a section.

Steps

1. Log in to the Site Administration Application and navigate to Catalog > Sections. Select the section to duplicate, and press Duplicate.
2. In the Duplicate Section page, enter a new, unique name for the section in the New Section Name field.
3. Optionally, select a new Parent Section for the duplicated section. If you do not select a new parent, the original section's parent section will be the parent section.
4. Select Apply to save changes. The duplicated section and all of its children (if applicable) appear in the Catalog Hierarchy list in the Sections page.

See [Section 4.2.1, "Creating Sections"](#), for more information about section page fields.

4.2.3 Adding Products to Sections Using the Sections Pages

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

Use the following procedure to add products to a section.

Steps

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

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

The Update Product Assignments page appears.

2. You can add product 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, an error message displays.

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.
4. Back in the Update Product Assignments page, the products chosen in the previous step will display in the page, along with any other previously assigned products.
 - a. Start Date field will be populated with the product's create date from Oracle Inventory. You can change this value if desired. If you change it, the value is not changed in inventory, but rather stored in iStore schema.
 - b. Optionally, select an End Date for the product using the calendar icon. A product whose End Date has passed will not appear in the Customer Application.
5. Select Apply to save the changes. The products are now assigned to the section.

Optionally, remove products from the section by selecting a product's checkbox and then selecting the Remove button.

4.2.4 Assigning Sections to Sites

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

Steps

1. Log in to the Site Administration Application and navigate to Catalog > Sections. Select applicable section and press Update.

Important: If the profile option, IBE: Use Catalog Exclusions, is set to No, the sections will still show up in excluded sites. Be sure to set the profile option to Yes for the exclusion functionality to work properly.

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

Use the shuttle windows and the arrow keys to change the site assignments for the section. Only sites to which this section's parent section belongs are candidates for including this section in them. To include the section in other sites not in the list, you must change the parent section's site assignments or change the parent section assignment for this section.

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

4.2.5 Adding Content to Sections

Use the following procedure to add content to a section.

Steps

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

Optionally:

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

In **Show** mode, optionally:

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

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

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

4.2.6 Selecting Layout and Setting Display Templates for Sections

Within section Display 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.

Gallery templates within Fixed and Configurable Layout are similar -- the same look and feel of templates available in the Fixed Layout gallery also are available in the Configurable Layout gallery, under the corresponding categories. In addition, with Configurable Layout:

- Bins associated to your sections are configurable by section (see [Section 4.4.4.2, "Using Configurable Bin Layout"](#)); and
- The template gallery has two additional templates which can understand the following content components: Section Additional Information 1 through Section Additional Information 5. The templates are: Multilevel Subsections List with Content and Section Detail with Content.

Note: Though Oracle iStore does allow switching from configurable to fixed layout after components have been mapped, it not advisable to do so.

Use the following procedure to select a layout type and map a Display Template to a section.

Steps

1. Log in to the Site Administration Application. Select Catalog > Sections. Select applicable section and press Update. The Update Section: Details page appears.
2. Select Templates. In the Update Section: Layout page, select either Configurable Layout or Fixed Layout.

3. Select Display Template. From the *Select a Display Template LOV*, select the appropriate Display Template category for the section you are updating.

When using Configurable Layout, you also can set bins to display for the section --- see [Section 4.4.4.2, "Using Configurable Bin Layout"](#), for details.

4. Press Go to apply your selection. The screen refreshes, with the templates available in the chosen category displaying in the Template Gallery.
 - To use the default template, select the Default Template option.
 - If not using the default template, select a template's radio button.
5. Press Apply to save changes.

Optionally, you may select a custom Display Template for the section. Any custom Display Templates that you have created will display in the Custom Display Template LOV. Previously migrated templates also will display in this LOV.

4.2.7 Setting the Display Order of Section Descendants

Using the Update Section: Display Order pages within the Catalog tab, you can set the display order of a section's descendant sections -- whether subsections or products. The Display Order pages change depending on which type of children a section has:

- **Subsections only** --- If the section has subsections only, then the sections will display in the re-order window. Plus, the **Advanced SQL** ordering option is **not** available.

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

- **Products only** --- If the section has products only, then the products will display in the re-order window, and the **Advanced SQL** option is available.

Note: You cannot enable the re-ordering of both products and sections simultaneously.

4.2.7.1 Using the Re-Order Shuttle to Order Section Descendants

Use the following steps to re-order a section's descendants using the re-order shuttle. Note that this will be the **only option available** if the section's descendants are **subsections** and not products.

Steps

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

4.2.7.2 Using SQL to Order Section Descendants

Advanced users may wish to use the Update Section: Display Order - Order by Clause page in the Sections menu to order products in a Featured section. See the *Oracle iStore Implementation and Administration Guide*, Implementing the Catalog chapter, for information on this feature.

4.2.8 Searching Sections

You can perform a Simple or Advanced search for sections.

Simple Search

1. Log in to the Site Administration Application and navigate to Catalog > Sections. Search by:
 - **Section Name**
 - **Section Code**
 - **Keywords** -- Keywords you have entered
 - **Status** -- Select Published or Unpublished

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

2. Press Enter or Go to engage search.

Advanced Search

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

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

2. In Advanced search, you can search by:
 - **Section Creation Date** --- Select **From Date** and **To Date**
 - **Section Name**
 - **Section Code**
 - **Keywords** --- Keywords you have entered

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

3. Press Enter or Go to engage search.

4.3 Products Quick Steps

Topics in this section include:

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

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

4.3.1 Updating Product Details

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

Steps

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

4.3.2 Adding Products to Sections Using the Products Pages

You can use this procedure to add a single product to multiple sections at the same time.

Steps

1. Log in to the Site Administration Application and navigate to Catalog > Products. Select the product and press Update. The Update Product: Details page appears.
2. Select Sections to retrieve the Update Product: Sections page.
3. Select Add Product to Sections to retrieve the Search and Select: Catalog Sections page, where you can search for and select appropriate sections. Only sections who are candidates for product assignment will display.
4. The product is added to the section(s). Remember that the product and its section must be in Published status and within valid dates to appear in the Customer Application. Also, they must be included in a site and the site must have valid dates.

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

4.3.4 Setting Content at the Product Level

Use the following procedure to set up content at the product level, using content component-media object relationships.

Steps

1. Log in to the Site Administration Application and navigate to Catalog > Products. Select the product and press Update. The Update Product: Details page appears.
2. Select Content to retrieve the Update Product: Content page listing product-class content components. Map content component to media object: Select flashlight icon launch Search and Select: Media Object page.
3. Select media object in Search and Select: Media Object page.
4. Back in the Update Product: Content page, selected media object displays next to content component.
5. Press Apply to save changes.
6. Optionally:
 - Select the create media object icon to create a new media object. See [Section 4.4.1, "Creating Media Objects"](#). After creating the media object, assign content source file to media object, if desired, directly from Product > Content page.
 - Select Show Details to show the content site/language mappings and to add content items.

In **Show** mode, you can:
 - Select View Mapping to view site/language mappings for content associated to media object. If no site/language mappings exist, button is de-active.
 - Select Add Content to add content item to media object; see [Section 4.4.2, "Assigning Content Items to Media Objects"](#).
7. If you have not already done so, map a content source file to the media object. See [Section 4.4.2, "Assigning Content Items to Media Objects"](#).

4.3.5 Setting Display Templates for Products

Use the following procedure to set the Display Template for a product. Product-level display settings override those made at the section level.

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

Steps

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

4.3.6 Searching for Products

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

Simple Search

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

Advanced Search

1. Log into the Site Administration Application and navigate to Catalog > Products.
2. Select Advanced Search.
3. Enter in the search textboxes the search criteria. Use the percent sign (%) as a wildcard if desired. Search is case insensitive. The searchable fields are:
 - **Product Name** — Enter all or partial product name

- **Product Number** — Enter all or partial product number
 - **Description** — Enter all or partial product description
 - **Category** — Enter all or partial Oracle Inventory category within the default category set
 - **Included Sites** — Select site in which the product is included
 - **Start Date** — Select product creation date
 - **End Date** — Select product creation end date
4. Select Go to launch search.

4.4 Content and Display Templates Quick Steps

Topics in this section include:

- [Section 4.4.1, "Creating Media Objects"](#)
- [Section 4.4.2, "Assigning Content Items to Media Objects"](#)
- [Section 4.4.3, "Uploading Source Files to Content Repository"](#)
- [Section 4.4.4, "Configuring Bins and Their Content"](#)
- [Section 4.4.5, "Mapping Source Files to Display Templates"](#)

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

4.4.1 Creating Media Objects

Use the following procedure to create a media object.

Steps

1. Log in to the Site Administration Application 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

2. In the Create Media Object page, enter:
 - **Media Object Name** --- Will not appear in the Customer Application
 - **Programmatic Access Name** --- Enter a value in the textbox, using the following guidelines:
 - If this will be a media object used with a content component, then the value entered here will be used for your own internal business purposes.
 - If this will be a media object used without a content component (e.g., called directly from a Display Template), then this name must be unique and entered into the Display Template call to the media object.
 - **Keywords** --- Enter keywords if desired, separated by commas; saved keywords can be searched in media object search utility
 - **Description** --- Enter description if desired; will not appear in Customer Application
 - **Class** --- Select a class for the media object, based on its display purpose
3. Press Apply to save changes.

4.4.2 Assigning Content Items to Media Objects

Each media object you use in your sites must link to the content item you are displaying. Additionally, you can create optional 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 Application and navigate to Content > Media Objects.
2. Select the Update icon in Media Objects page to retrieve the Update Media Object page.
3. Select Add Content to launch the Add Content page.

You also can access the Add Content page from the Catalog tab (Sections > Content > Show Details hyperlink and Products > Content > Show Details hyperlink).

4. Add the content source file: In the Add Content page, select flashlight icon to launch the Search and Select: Source Files page.
5. In the Search and Select: Source Files page, find and select a content source file from the Content Repository.

If you have not yet uploaded the source file to the Content Repository, then, in the Add Content page, press the Upload button next to the Source File Name textbox to upload the source file. Browse for and select the source file from the file system.

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

4.4.3 Uploading Source Files to Content Repository

The Content Repository is a tool that allows source files to be readily available to you for use as content for media objects. You must first upload files from your local file system to the database before they become available in the repository.

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

Steps

1. Log in to the Site Administration Application and select Content > Content Repository. The Content Repository page shows all content items available in the Content Repository.
2. Select Upload Source File to retrieve the Upload Source File page.
3. Browse the file system for the file to replace the current file, using the Browse button. Select the file using your operating system's conventions for selecting a file.
4. Optionally, select the Secured checkbox to apply security to the attachment.

Using the Secured checkbox allows Oracle iStore to use security for attachments. Oracle iStore checks the SECURED_FLAG column in JTF_AMV_

ATTACHMENTS_B table, and for secured attachments, security measures are used through jtfdownload. Unsecured attachments are loaded through 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.

4.4.3.1 Updating/Replacing Source Files

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

Steps

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

4.4.4 Configuring Bins and Their 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.

For a list of bins, see the Display Templates appendix in the *Oracle iStore Implementation and Administration Guide*.

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.

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.

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.

4.4.4.1 Using Fixed Bin Layout

With Fixed Bin Layout, page types that can hold 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 the Display Templates appendix in the *Oracle iStore Implementation and Administration Guide*.

To map content for one of these bins, simply map a JSP to the template bin, and then, if desired, set up specific site-language mappings for different JSP files. For steps, see [Section 4.4.5, "Mapping Source Files to Display Templates"](#).

4.4.4.2 Using Configurable Bin Layout

Oracle iStore's Configurable Layout functionality allows you to display targeted bin content in different sections. Without Configurable Layout (using Fixed Layout), when you map content to a section bin (which is a Display Template), all live sections mapped to a site display the same bin content. With Configurable Layout, different sections can display different bin content.

- Only bin templates within the Components for Section category are candidates to be used with this functionality.

Use the following procedure to set up a section using configurable layout components.

Steps

1. Log in to the Site Administration Application. 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. In the **Search and Select: Template** page, select the template and press the **Select** button to select the template. You may use the percent sign (%) as a wildcard in the template search utility.
Note: As a best practice, use only templates which are associated to the *Applicable To* category of *Components for Section*.
6. Repeat to assign additional layout components to the section.
7. Optionally, select *Apply layout and mapping to all descendent sections* to apply this mapping to any subsections of this section.
8. Press **Apply** to save changes.
9. If necessary, map source files to the components used in the display. See [Section 4.4.5, "Mapping Source Files to Display Templates"](#), for steps.

4.4.5 Mapping Source Files to Display Templates

You can link your own JSP files to the seeded templates to present customized content. This functionality can be used with any of the Display Templates and bins present in Template Manager. Use the following procedure.

Steps

1. Log in to the Site Administration Application. 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 Application. 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. 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.
6. Once you have selected either All or a specific site, the Language LOV will become active. 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.
7. Press Apply to save changes.

See the Implementing the Catalog chapter in the *Oracle iStore Implementation and Administration Guide* for more information.

4.5 Reports Quick Steps

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

This section's topics include:

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

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

4.5.1 Retrieving Discoverer Reports

Use the following procedure to retrieve Oracle Discoverer reports from the Site Administration Application.

Steps

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

4.5.2 Setting Bin Preferences

Use bin preferences to configure bin display. After selecting the **Edit** link at the top of a bin, you can set preferences per session or cross sessions, utilizing the following submenus:

- **Parameters** -- Use this submenu to set **session-only** preferences.
- **Personalize** -- Use this submenu to set **cross-session** preferences.

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

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

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

4.5.2.1 Setting Preferences for Business Bins

This section describes the parameters available for business bin preferences.

- For step-by-step instructions on how to access the preferences screens, see [Section 4.5.2.3, "Steps to Set Bin Preferences"](#).
- For a list of business reports, see [Section 2.5.2, "Business Reports"](#).

For the business reporting bins, you can specify the following in the **Parameters** or **Personalize** pages:

- **Default currency** --- Use this LOV to select the default currency in which the bin should display monetary data. Currencies must be set up in Oracle General Ledger before they will appear in the Site Administration Application.
- **Number of Rows** --- Use this LOV to set the default number of rows in the bin.
- **Frequency** --- Use this LOV to specify the time period for the data that the bin should display.

Remember, no matter which frequency you select, the data displayed is dependent upon the End Date of the concurrent program which last populated the data tables.

Frequency time periods are the Oracle General Ledger period types, and the data displayed will be from the start of the period containing the end date of the concurrent program to the end date itself. For example, if the End Date of the concurrent program is July 15, the month period displayed will be July 1 to July 15.

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

Frequency options are:

- **Day** — Select this option to view business data from the previous one day.
- **Week** — Select this option to view business for the previous one week, (specifically, between the end date of the concurrent program and the Monday that most recently preceded it).
- **Month, Quarter, and Year** — Select these options to view the business data from the past month, quarter, or year.
- **Scaling** --- Use this LOV to set the default scaling of numerical values. To display amounts in standard format, select Tens.

4.5.2.2 Setting Preferences for Operational Reports

This section describes the parameters available for operational bin preferences.

- For step-by-step instructions on how to access the preferences screens, see [Section 4.5.2.3, "Steps to Set Bin Preferences"](#).
- For a list of operational reports, see [Section 2.5.3, "Operational Reports"](#).

For the operational reports, you can set the following preferences in the **Parameters** or **Personalize** pages:

- **Maximum Number of Days** --- Use this LOV to set the maximum number of product/section creation days prior to the current date.
 - For the **Unpublished Products** bin, this means only unpublished products **created** between the current date and the current date minus the maximum number of days are displayed.
 - For the **Unpublished Section** bin, this means only unpublished sections **created** between the current date and the current date minus the maximum number of days are displayed.
- **Maximum Number of Sections/Products** --- Use these LOVs to set the maximum number of sections or products to display in the bin.
- **Title** --- Use this textbox to create your own bin title. Note that this will overwrite the current bin title. To use the seeded bin title, remove all text from the textbox.
- **Footer** --- Use this textbox to create your own bin footer. Note that this will overwrite the current bin footer. To use the seeded bin footer, remove all text from the textbox.
- **Available Columns/Displayed Columns** --- Use the column shuttle windows to set the columns which will display in the bins.

4.5.2.3 Steps to Set Bin Preferences

Use the following procedure to set bin preferences.

Steps

1. Log into the Site Administration Application 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:
 - To change your preferences for this session only, choose Parameters.
 - To change your preferences and save them for future sessions, choose Personalize.

Note: The parameters in the Parameters submenu override those in the Personalize submenu, which in turn override the coded default parameters.

4. In the page that opens, edit the bin preferences as desired, and select Update to save changes. For field descriptions, use the information in:
 - [Section 4.5.2.1, "Setting Preferences for Business Bins"](#)
 - [Section 4.5.2.2, "Setting Preferences for Operational Reports"](#)

4.5.3 Setting up E-mail Delivery for Reports

Oracle iStore can deliver the Top N Orders Report and 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 Application.

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

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

Steps

1. Log in to the Site Administration Application and select Reports > Email Reports. The Email Reports page displays. The User List for Selected Report area shows a list of users who are already set up to receive an e-mail delivery of the report selected in the Select Report LOV.
2. Optionally, you can turn on or off the e-mail delivery of these reports by using the Enable Email Reports checkbox. If the checkbox is not active, then the reports do not get mailed. Note that this does **not** toggle any profile option value.
3. From the Select Report pull-down menu, select the report for which you want to designate recipients, and then select the Go button. The User List for Selected Report refreshes with a list of the current e-mail report recipients for the report which you have selected.
4. Optionally, you can delete an e-mail delivery by selecting the Delete icon next to the applicable row.
5. **Adding a new delivery:** To add a recipient, select Add User button. The Email Preferences: Add User page opens.
6. In the User Name field, enter the recipient's name.

7. In the Email Address field, enter the recipient's full e-mail address.
Example: john.doe@company.com
8. From the Language pull-down menu, select the language of the e-mail report.
9. Press the Apply button to save the changes.
10. The Email Reports page displays. To view the changes, may need to select the report again in the Select Report LOV and press the Go button.

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