Oracle® iStore

Quick Reference Guide

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Oracle iStore Quick Reference Guide, Release 12

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle iStore Quick Reference Guide*.

This guide provides an overview of the Oracle iStore application.

See Related Information Sources on page viii for more Oracle Applications product information.

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Structure

1 Introduction to Oracle iStore
2 Site Administration Application
3 Customer Application

Related Information Sources

Guides Related to This Product

Oracle iStore Implementation and Administration Guide

This manual contains detailed information on implementing and administering Oracle iStore. Please refer to this document for additional information on Oracle iStore, other than that contained in this guide.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

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 an Oracle Applications form 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.

1

Introduction to Oracle iStore

This chapter covers the following topics:

- Introduction
- Key Features and Benefits
- Site Administration Application
- Catalog Management
- Content Management
- Site Reporting
- Automated User Communications
- Background Data Management
- User Management, Self-Service Registration, and Customer Information
- Globalization and Localization Support
- Interactive Selling and Ordering Options
- Order Management and Fulfillment
- Marketing and Customer Tracking
- Business Objects, Components, and Processes
- Mandatory Integrations with Other Oracle Applications
- Optional Integrations with Other Oracle Applications

Introduction

Fully integrated with the Oracle E-Business Suite, Oracle iStore is a powerful tool that allows businesses to create and manage online e-commerce 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

- Quotes and sales representative assistance

- Order processing

- Credit card authorization

- Content management

- Configured items, including telecommunications items

- Human resource management

- Reporting and visit tracking

- Marketing

- Financials and procurement

Key Features and Benefits

Oracle iStore 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. Integration with Oracle Web Analytics allows tracking of site visits and provides a wide range of site tracking reports.

Key features and benefits of Oracle iStore are discussed in this section.

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 sites

- Easily duplicate sites, catalogs, and content

- In Preview mode, immediately preview the sites

- Configure the display order of site names as they are presented in the Customer UI

- Utilize powerful search utilities built into each main page

- Target different customer segments with different sites and catalogs

- Support globalization features, such as multiple languages and currencies

- Brand each site differently

- Provide different content for the same product on different sites

- Enable different payment and shipping methods for each site

- Set different price lists on each site for each user type (guest, B2C, B2B, partners)

- Set attributes at the site level (such as allowing guest users, allowing ATP checks, etc.)

- Restrict sites via user responsibilities

- Set organization-level access controls

- Enable tracking and metrics reporting sites, if integrating with Oracle Web Analytics.

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

- Name

- Product catalog

- Section hierarchy

- Target users

- Currency

- Language

- Price lists

- Payment types

- Payment type thresholds

- Shipping methods

- Access restrictions

- Product and section exclusion rules

- Effective dates

- Visits reporting status (applicable if integrating with Oracle Web Analytics)

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 (catalog) hierarchy that can be as simple or complex as your business requirements necessitate. Sections are created in parent-child relationships. Products "hang" on nodes of the section hierarchy.

- Ability to control the browsing experience of the customer through section and subsection presentation.

- Cross-sell capabilities using the seeded Related items relationship, as well as support for a variety of other relationships between products, sections, and Inventory categories.

- A built-in search utility which allows you to locate a product by entering several criteria, including product name, number, category, description, as well as searching by sites that contain the product.

- Product search can support both Section Search and Category Search.

- Optional integration with Oracle interMedia allows you to set up a powerful product search in the specialty sites.

- A Display Template gallery which lets you quickly pick, in WYSIWYG fashion, the layout of individual or groups of sections and products.

- Configurable bins to which you can map your own JSPs and position along the sides, tops, and bottoms of catalog, shopping cart, and user registration pages. Several of the bins are pre-seeded with content.

- The ability to construct targeted catalogs accessible to segments of customers.

- The ability to exclude catalog portions from specific sites.

- Product autoplacement feature which allows the populating of sections with products through a single concurrent program.

- Support for several product types, including serviceable items, configured items, and model bundles.

- Flexible pricing support, including promotional goods modifiers and sites as pricing qualifiers.

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

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 UI. This rich catalog display environment presents a multitude of possibilities for mapping content files to alter the look and feel of the specialty sites.

- Concurrent programs that allow you to copy sections with 1000-plus children and to cascade layout mappings to child sections.

- Re-usable content components and media objects.

- Easy-to-use interface for mapping source files to the media objects.

- Components and objects that are organized by type of display they effect.

- Framework for reusing a single source file in any number of site catalog pages.

- Ability to map content to specific sites and languages combinations.

- Easily update files which display in the specialty sites.

- Easily integrate with third-party catalogs to facilitate a Procurement Punchout implementation.

- Optional integration with Oracle Content Manager to provide content item creation, versioning, approvals, and a translation interface.

Site Reporting

Oracle iStore supplies a variety of data that feeds the metrics in several e-commerce business intelligence and operational reports. The operational reports are presented in Oracle Discoverer Viewer and the e-commerce intelligence reports in Oracle E-Commerce Intelligence, which leverages both the former Oracle iStore DBI framework and Oracle Web Analytics reporting. Together these reports provide a rich collection of valuable data about your sites, your customers, and their ordering activity.

Automated User Communications

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

- Orders placed or cancelled

- Contract negotiations

- Shared carts

- Forgotten passwords and login assistance

- Registration confirmation

- Sales assistance requests

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

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

Background Data Management

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

- The Lead Import concurrent program pulls customer data from orders and expired carts into database tables for use in other Oracle applications

- The Product Search concurrent program automatically populates necessary tables with product updates for use in the Customer Application product search

- Reports Fact Tables Refresh supplies automatic updates of transactional and operational data about the sites

- Concurrent programs exists that duplicate large sections and cascade section layout mappings to child sections.

- The Express Checkout concurrent program converts Express Checkout shopping carts into orders.

- Two concurrent programs export or import Display Template mappings using XML files.

- The iStore Autoplacement concurrent program can be used to populate leaf sections with products from Oracle Inventory categories.

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 prevent primary users from creating other users by setting a profile option.

- Online Access to Existing Account functionality provides quick online access for users who have placed orders through channels other than Oracle iStore.

- Support for customers integrated with Oracle iSupport and Oracle Partner Management.

- Business-to-Consumer (B2C) functionality allows you to quickly launch an online presence to the buying public.

- Supplied integration with the Oracle customer data storage model, Oracle Trading Community Architecture (TCA), provides the ability to maintain customer information and complex party relationships.

- Address Book and Payment Book functionality in the Customer Application allows users to maintain their own data.

- Ability to mandate the entry of B2B user contact information.

- Optional integration with Oracle Quoting allows interactive selling and online user assistance.

Globalization and Localization Support

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

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

- Oracle Multiple Organization Architecture gives you the ability to create and manage multiple organizations, inventory units, and warehouses internationally.

- Multiple currency support allows you to deploy sites --- with targeted products and prices --- in any country.

- The globally-oriented Site Selection Page is the default landing page for the Customer UI. It displays all sites in your implementation, with separate links for each supported language.

- Seeded media objects for specific languages, allowing you to display country-specific images for each language.

- Templates which can show taxes, payment and shipping methods, and address formats which are particular to a country for which the site has been set up.

- E-mail notification messages leveraging Oracle Workflow can be provided in all languages, and configured by organization, user type, and site.

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 (terms and conditions)

- Collaborative quoting

- Call-me-back functionality

- Sophisticated pricing

- Shared shopping carts

- Returns

- Guided selling and product configuration online

- Product model bundles

- Ability to capture end customer data during checkout

- Order tracking

- Opt in/opt out capabilities

- Real-time inventory checks and reservations

- Shopping lists

- Order cancellation

- Shipping priority, instructions, and ship to multiple locations

- Billing to multiple locations

- Automatic e-mail notifications

- Express checkout

Order Management and Fulfillment

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

- Instant order transmission and fulfillment through Oracle Order Management

- Shipping and shipment tracking capabilities through Oracle Shipping

- Online automated payment processing through integration with Oracle Order Capture

- Order cancellation abilities

- Order returns

- Optional integration with Oracle Financial applications can provide accounting support

- Order tracking, including the ability to view invoice, shipping, and payment details

- Published quotes, sales assistance and Terms and Conditions fully integrated with

Oracle Quoting

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 Oracle iStore Customer Application in other web pages.

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.

- **Support for Internet technologies:** Oracle iStore offers specific support for implementing the caching of Web pages, secure socket layer connections, de-militarized zone environments, and search engine indexing.

- **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.

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 E-Business Tax** provides tax rate information for Oracle iStore.

- **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 *Oracle iStore Implementation and Administration Guide* and the respective product documentation.

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 Application Server Web Cache:** Use Oracle Application Server Web Cache to serve the non-transactional Oracle iStore content.

- **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 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 Installed Base:** Use Oracle Installed 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 Payments:** Oracle iStore uses the Oracle Payments integration with third-party applications to authorize credit card transactions.

- **Oracle Partner Management:** You can integrate Oracle iStore specialty sites with Oracle Partner Management to provide support for users of both applications.

- **Oracle Procurement:** Use Oracle Procurement to provide Direct Punchout Catalog functionality from within the Oracle iStore Customer Application.

- **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 Sales Contracts:** Use Oracle Sales Contracts for Terms and Conditions, Contract Expert, and Unstructured Contract Terms functionality.

- **Oracle Service Contracts:** Oracle Service Contracts can assist in providing support for selling serviceable items and their related services in the Customer Application.

- **Oracle Single Sign-On Server:** Use Oracle Single Sign-On Server to provide single-authentication architecture.

- **Oracle Web Analytics:** Use Oracle Web Analytics to track Oracle iStore Customer Application Web site visits and to report on these visits.

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

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

2

Site Administration Application

This chapter covers the following topics:

- Site Management
- Main Features of Sites
- Oracle iStore Administrator
- Preview Mode
- Display Template Mappings Import/Export
- Customer Application Display
- Display Templates
- Section and Product Template Gallery
- Bin Display
- Images, Messages, and HTML Content
- Content Management
- Content Repository
- Content Components and Media Objects
- Optional Integration with Oracle Content Manager
- Catalog Management
- Section Hierarchy
- Product Catalog
- Reports
- E-Mail Notifications
- Background Data Management

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*.

Main Features of Sites

Main features of the site-building application include:

- Oracle iSupport and **Site Management:** The easy-to-use Site Administration Application is a complete site creation and maintenance application. Each site can have its own parameters and targeted customers. Integrated support is provided for Oracle Partner Management and Oracle iSupport 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 Site Selection Page as hyperlinks next to the site names. 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. Separate price lists can be assigned, per site, for guest users, B2B users, B2C users, and partner users. Oracle iStore also supports multiple-currency price and site-specific price lists, and several options are available for setting up pricing qualifiers and modifiers.

- **Shipping Methods:** Each site can have its own shipping methods. Additional capabilities can be made available through integration with Oracle Shipping Execution.

- **Payment Types:** You can provide any type of payment option to your customers, which can then be processed in other Oracle 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 features built-in 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 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.

- **Visitor Tracking:** Integration with Oracle Web Analytics provides metrics, by site, about visitor activities in your Oracle iStore or third-party 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.

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.

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

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 the "Advanced Display" chapter in the *Oracle iStore Implementation and Administration Guide* for complete details.

Customer Application Display

Oracle iStore utilizes JavaServer Pages™ (JSP™), which combine Application Programming Interfaces (APIs) to call dynamic data and HTML to present static data. A robust PL/SQL layer interfaces with the Oracle database to provide consistent and accurate data storage and retrieval.

In the Customer 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 in the *Oracle iStore*

Implementation and Administration Guide.

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" and "Advanced Display" chapters in the *Oracle iStore Implementation and Administration Guide*.

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.

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 site selection, 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.

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

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 Messages and Prompts" 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*.

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*.

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.

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

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

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

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*.

Catalog Management

Oracle iStore 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*.

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.

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

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

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

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.

Supported Product Types

Oracle iStore supports the following types of products:

- Standard items

- Configured items

- Model bundles

- Telecommunications service items

- Service items

Reports

Oracle iStore supplies a variety of data that feeds the metrics in several e-commerce business intelligence and operational reports. The operational reports are presented in Oracle Discoverer Viewer and the e-commerce intelligence reports in Oracle Web Analytics, which leverages both the Oracle Business Intelligence (BIS) and Oracle Web Analytics reporting. Together, these reports provide a rich collection of valuable data about your sites, your customers, and their ordering activity.

Oracle Web Analytics reports present the following data:

- Web visitor trends, including such metrics as visit duration, opt-outs, and page views

- Web visitors converted to customers

- Web product interest, including number of product and product category views

- Web customer acquisitions and activity, including top ordering customers and customer activity by customer classification

- Web campaign analyses, featuring direct integration with Oracle Marketing and Oracle Interaction History

- Web page interest reporting on Oracle iStore and external site page views, page view duration and the like

- Top selling web products

- Number of carts created over time, and the number and amounts of carts converted to orders

Operational reports present the following data:

- Product assignment and published/unpublished status reports

- Section assignment and published/unpublished status reports

Following are the operational reports:

- Unassigned Products Report

- Assigned Products Report

- Products by Site Report

- Products Excluded by Site Report

- Sections With Site Assignment Report

- Sections Without Site Assignment Report

- Sections With Site Exclusion Report

- Empty Sections Report

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

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

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.

Background Data Management

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

- **Reporting:** The reporting concurrent program 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.

- **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.

- **Section Duplication and Cascade Layout Mappings:** These concurrent programs are provided to duplicate sections containing large numbers of child sections, and to duplicate and cascade the layout mappings of a parent section to its child sections.

- **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.

For more information, see the "Concurrent Programs" chapter in the *Oracle iStore Implementation and Administration Guide*.

3

Customer Application

This chapter covers the following topics:

- Specialty Sites
- Specialty Sites Overview
- Catalog Pages Overview
- Shopping Carts
- Shopping Cart Key Features and Benefits
- Active, Saved, and Shared Shopping Carts
- Published and Shared Quotes
- Shopping Lists
- Order Placement and Tracking
- Checkout and Order Placement
- Express Checkout
- Order Tracking, Cancellation, and Returns
- Users and Registration
- User Types and Access
- User Registration
- B2B User and Role Management
- Storage of User and Company Information
- Opting In or Out

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.

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.

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*.

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 Application Initial Pages" chapter of the *Oracle iStore Implementation and Administration Guide*.

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*.

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*.

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 Application Initial Pages" and "Implementing Content" chapters of the *Oracle iStore Implementation and Administration Guide*.

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, an Account Switcher 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.

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.

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

- Duplicate 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

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.

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

Active, Saved, and Shared Shopping Carts

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

- **Saved Carts:** Users' saved carts appear here.

- **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.

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.

Saved Carts

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

To retrieve a saved cart from the 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.

From the Saved Cart Details page, users typically can perform the following activities:

- **Update the cart:**Users must update (activate) a saved cart in order to modify it.

- **Share the cart:** This begins the process of sharing the cart. The Share Cart action only appears if the site administrator has enabled this feature.

- **Duplicate the cart:** Users select the Duplicate Cart action to create a copy of the cart. Copied carts are saved with a new, user-defined name.

- **Checkout/Place Order:** Users press the Checkout button to enter the checkout phase and place an order with the cart.

- **Delete the cart:**This action deletes the cart.

Once the user activates the cart by updating the cart or checking out, the cart becomes the active cart.

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 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.

Active Carts

Once the user activates the cart by updating the cart or pressing Checkout, the cart becomes the active cart. In the active cart, the customer can perform a variety of activities, as described below. Note that some of this functionality requires additional setups and, possibly, integration with other Oracle applications.

Cart Activities

Following are the typical cart activities. Different activities will be available depending upon status of the cart (active/inactive, saved, shared, etc.)

- **Continue Shopping:** Customers can select the Continue Shopping button to continue browsing the web site and potentially add more items to the active cart.

- **Save the Cart:** Customers can name and save carts for later retrieval.

- **Remove Items:** Customers can select the Remove icon to remove items from the cart.

- **View Product Details:** Customers can select product names to view details of products in the cart.

- **View Configuration Details:** If applicable, customers can select the Details hyperlink to view details of a configured product.

- **Add Services:** If applicable, customers can select the Add Service hyperlink to add services (e.g., warranties) to a product in the cart.

- **Reconfigure items:** If applicable, customers can select the Reconfigure hyperlink to launch Oracle Configurator and reconfigure a configured product.

- **Recalculate the Cart:** Customers can recalculate cart totals.

- **Add Information:** If the Additional Information descriptive flexfield has been implemented, customers add cart-level information requested or offered by the site administrator. For example, users making purchases can be allowed to enter additional information.

- **Access Pricing Agreements:** Customers can select pricing agreements to associate pre-defined pricing agreement with the cart.

- **Use Promotion Codes:** Customers can enter promotion codes that have been pre-defined.

- **Add Attachments:** If the functionality is enabled, B2B customers can add attachments to the cart.

- **Check Product Availability:** Customers can check whether a product is available on their desired shipping dates.

- **Share the Cart:** If the functionality is enabled, customers can select share the cart with other customers.

- **Save as List:** If the functionality is enabled, customers can save the items in the cart to a shopping list.

- **Checkout:** Customers can select Checkout to enter the checkout phase and eventually place the order.

- **Express Checkout:** If the functionality is enabled, customers can submit the cart as an Express Checkout order.

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

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 Quotes page within the Cart menu. The Quotes page organizes quotes into different areas:

- **Quotes:** Customers' published quotes display in the Quotes area.

- **Shared Quotes:** Customers' shared quotes appear in the shared quotes area, 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.

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 Quotes page to retrieve the Shared Quote Details page.

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.

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. Site administrators also can allow user updating of quotes in the specialty sites.

In the Quotes page, customers 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.

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.

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

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

Sales Representative Assistance

If you have integrated Oracle iStore with Oracle Quoting and set up the Sales Assistance feature, customers can request sales assistance from the shopping cart or in the checkout phase. After a customer requests sales assistance and submits the request, the cart becomes a quote and the default 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.

This functionality requires that both Oracle Quoting and the Sales Assistance feature have been implemented. For more information, see the following chapters in the*Oracle

iStore Implementation and Administration Guide: "Integrating Oracle iStore with Oracle Sales Contracts", "Integrating Oracle iStore with Oracle Quoting", and "Implementing Customer Assistance".

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 Shopping Lists subtab in the Cart menu in the Customer Application.

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

Order Placement and Tracking

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

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 following chapters in the *Oracle iStore Implementation and Administration Guide*: "Verify Mandatory Dependencies", "Implementation Tasks for Oracle iStore", and "Implementing Carts and Orders".

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.

Shipping and Billing Information

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

In the 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. User permissions also control checkout and order placement abilities for B2B customers.

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

End Customer Information

If the functionality is enabled, customers can enter details about the end customer(s) on the order. Typically, this functionality would be applicable in a partner scenario where a vendor wishes to capture the end customer information.

Terms and Conditions

If the functionality is enabled, customers can review Terms and Conditions (T&Cs) of an order before placing the order. If the customer rejects the T&Cs, the cart becomes a quote in Oracle Quoting.

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

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*.

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. Express Checkout is available from the catalog and shopping cart pages.

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.

Order Tracking

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

- Search mechanism, including advanced searches

- Order details

- Invoice details

- Payment details

- Shipping details

- Returns details and submission

- Pending Express Checkout orders

- Install base 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.

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.

Oracle Install Base Integration

Integration with Oracle Install Base enables customers to view details of their install base, and if applicable, to reconfigure items from these pages.

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

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.

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

In addition to the standard user registration, Oracle iStore also offers Online Access to Existing Account registration, whereby users who have placed an order via a channel other than iStore can register and gain immediate access to their existing orders.

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 User Management" chapter.

User Registration

Typically, Oracle iStore users register in the 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. Oracle iStore framework also supports the Online Access to Existing Account functionality, whereby users who have placed an order via some other channel than Oracle iStore can register and gain access to their orders information.

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.

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 User Management" chapter.

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.

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 versus 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*.

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.

Opting In or Out

Several Oracle applications --- such as Oracle Sales 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.

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