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Send Us Your Comments

Oracle iStore Implementation and Administration Guide, Release 12.2

Part No. E49076-16

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle iStore Implementation and Administration Guide*.

See Related Information Sources on page xxx for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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Related Information Sources

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 Oracle 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 E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data

Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

Introduction

This chapter covers the following topics:

- Oracle iStore Overview
- Site Administration Application
- Catalog Management
- Content Management
- 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

Oracle iStore Overview

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 Internet-based sites that capture and process customer orders. In addition, integration with other Oracle applications provides a broad range of e-commerce capabilities.

Implementing Oracle iStore lets you:

- Build, test, and launch sophisticated online stores in multiple languages and currencies

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

Site Administration Application

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

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

- Create and maintain of any number of sites
- Easily duplicate sites, catalogs, and content
- In Preview mode, immediately preview the sites
- Configure the display order of site names as they are presented in the Customer UI
- Utilize powerful search utilities built into each main page
- Target different customer segments with different sites and catalogs
- Support globalization features, such as multiple languages and currencies
- Brand each site differently
- Provide different content for the same product on different sites
- Enable different payment and shipping methods for each site
- Set different price lists on each site for each user type (guest, B2C, B2B, partner)
- 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

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

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

Site creation is covered in the chapter, *Implementing Site Management*, page 5-1.

Catalog Management

Oracle iStore provides a full catalog management application in the Site Administration UI, giving merchants a highly configurable, Internet catalog presentation tool.

Leveraging the powerful Oracle Inventory on the back-end and Oracle iStore's catalog building tool in the Site Administration UI, the catalog is a flexible tool which supports multiple languages and currencies. Highlights include:

- A section (catalog) hierarchy that can be as simple or complex as your business requirements necessitate. Sections are created in parent-child relationships. Products "hang" on nodes of the section hierarchy.
- Ability to control the browsing experience of the customer through section and subsection presentation.

- Cross-sell capabilities using the seeded Related items relationship, as well as support for a variety of other relationships between products, sections, and Inventory categories.
- A built-in search utility which allows you to locate a product by entering several criteria, including product name, number, category, description, as well as searching by sites that contain the product.
- A Customer Application product search that can support both Section Search and Category Search.
- Optional integration with Oracle interMedia that 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, site selection, and user registration pages. Several of the bins are pre-seeded with content.
- Concurrent programs that allow you to copy sections with 1,000-plus children and to cascade layout mappings to child sections.
- Ability to construct targeted catalogs accessible to segments of customers.
- Ability to exclude catalog portions from specific sites.
- Product autoplacement feature that allows the populating of sections with products through a single concurrent program.
- Support for several product types, including serviceable items, configured items, telecommunications service items, and model bundles.
- Flexible pricing support, including promotional goods modifiers and sites and customers as pricing qualifiers.
- Optional integration with Oracle Marketing allows you to create and maintain Inventory products, product templates, and several other product parameters.

For more information, see the chapter, *Implementing the Catalog*, page 9-1.

Content Management

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

- Hundreds of configurable Display Templates present the Customer UI. This rich catalog display environment presents a multitude of possibilities for mapping content files to alter the look and feel of the specialty sites.
- Re-usable content components and media objects.
- Easy-to-use interface for mapping source files to 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 that display in the specialty sites.
- Ability to 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.

For more information, see the chapters, *Implementing the Catalog*, page 9-1, and *Implementing Content*, page 10-1.

Automated User Communications

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

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

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

This functionality is provided through Oracle iStore's integration with Oracle Workflow. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for more information.

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 exist 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.

A summary of these concurrent programs is provided in the chapter, *Concurrent Programs*, page 35-1. You can find details about individual concurrent programs in the chapters which cover their core functionality.

User Management, Self-Service Registration, and Customer Information

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

- Business-to-business (B2B) functionality allows management of complex relationships with corporate customers in a self-service environment, including the ability to restrict access by organization. The seeded Primary User role allows organizational users to set up and manage a community of business users.
- 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.

See the chapters, *Implementing User Management*, page 14-1, and *Implementing Carts and Orders*, page 13-1, for more information.

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

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

See the chapters, *Implementing Initial Customer Application Pages*, page 6-1, and *Implementing Globalization and Multi-Org Architecture*, page 17-1, for more information.

Interactive Selling and Ordering Options

Oracle iStore provides numerous features for interactive selling, user assistance, and ordering options for customers in the Customer Application. Highlights 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 and integration to Oracle Install Base
- 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

Note that some of these features require integration with other Oracle applications. For more information, see the chapters, *Implementing Pricing*, page 11-1, *Implementing Carts and Orders*, page 13-1, and *Implementing Customer Assistance*, page 15-1, as well as other chapters which detail integrating with Oracle iStore.

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
- Order cancellation abilities
- Order returns
- Integration with Oracle Financials applications can provide accounting support
- Order tracking, including the ability to view invoice, shipping, and payment details
- Published quotes, sales assistance, and Terms and Conditions fully integrated with Oracle Quoting

For more information, see the chapters, *Implementing Payment Types and Shipping Methods*, page 12-1, and *Implementing Carts and Orders*, page 13-1.

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 that allows the capture of valuable customer information from Oracle iStore shopping carts. Oracle Sales applications then can use the data in marketing efforts. See the chapter, *Integrating Oracle iStore with Oracle Sales Applications*, page 29-1, for more information.
- Ability to post advertisements into Oracle iStore Customer Application bins, an option which leverages integration with Oracle Marketing.
- Personalized customer event tracking through the integration with Oracle

Marketing integration. See the chapter, *Integrating Oracle iStore with Oracle Marketing*, page 26-1, for more information.

- Ability to create deep link advertisements to the Customer Application in other Web pages. See the chapter, *Advanced Display*, page 36-1, for details.

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 Display Templates:** All Customer UI menus and pages are customizable using logical template names.
- **Processing and Routing Templates:** Working in combination with the Display Templates, the processing and routing templates contain the logic and appropriate business flows through the sites.
- **Oracle BLAF:** Both the Site Administration and Customer user interfaces offer the Oracle BLAF (browser look and feel) compliant user interfaces (UI). The Oracle BLAF UI provides consistent look and feel and similar task flows across the Oracle E-Business Suite applications. All section and item runtime templates are BLAF compliant.
- **Multicustomer Access:** With the Multicustomer Access feature, an iStore B2B user can view and place orders on behalf of multiple customers using a single login ID. The B2B user can view or place orders for their default customer, and search for customers or accounts in the Welcome Bin and select a different customer-account context. iStore implementations can establish access to multiple customers and the associated accounts of business users through a series of Application Program Interfaces (APIs) that can create or delete multiple customer access for a B2B user.

In addition to the APIs, iStore implementations can establish relationships between the B2B user and multiple customer accounts by leveraging existing Oracle E-Business Suite application modules (e.g. Oracle Receivables, Oracle Customers Online).

Verify Mandatory Dependencies

This chapter covers the following topics:

- Overview of Verify Mandatory Dependencies Chapter
- Dependencies and Integrations to Other Oracle Applications
- Accessing the Applications
- Install Software
- Setting up Oracle E-Business Tax
- Setting up Oracle Trading Community Architecture
- Setting up Oracle General Ledger
- Setting up Oracle Human Resources
- Setting up Oracle Inventory
- Setting up Oracle Order Management
- Setting up Oracle CRM Technology Foundation
- Optional Integrations with Oracle iStore

Overview of Verify Mandatory Dependencies Chapter

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

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

Dependencies and Integrations to Other Oracle Applications

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

Oracle iStore and Multiple Organizations

Information about multiple organizations (*multi-org*), specific to Oracle iStore, is contained in the chapter, *Implementing Globalization and Multi-Org Architecture*, page 17-1. For Oracle Applications multi-org information, see *Oracle E-Business Suite Multiple Organizations Implementation Guide*.

Mandatory Dependencies and Optional Integrations

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

Mandatory Dependencies

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

Oracle iStore mandatory dependencies are:

- Oracle CRM Technology Foundation
- Oracle E-Business Tax
- Oracle General Ledger
- Oracle Human Resources
- Oracle Inventory
- Oracle Order Management
- Oracle Order Capture
- Oracle Trading Community Architecture

Limited setup information about these products is contained in this chapter. Refer to the product-specific implementation and user manuals for complete information.

Optional Integrations

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

See the "Optional Integrations with Oracle iStore" section of this chapter for a discussion

of these applications.

Mandatory Dependency Implementation Steps

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

Mandatory Dependencies Setup Steps

Step	Required	Reference
Install Software	Yes	"Install Software" section
Verify Underlying Technology Stack Installation	No	"Initial Installation Verification" section
Set up Oracle E-Business Tax	Yes	"Setting up Oracle E-Business Tax" section
Set up Oracle General Ledger	Yes	"Setting up Oracle General Ledger" section
Set up Oracle Human Resources	Yes	"Setting up Oracle Human Resources" section
Set up Oracle Inventory	Yes	"Setting up Oracle Inventory" section
Set up Oracle Order Management and Oracle Order Capture	Yes	"Setting up Oracle Order Management" section
Set up Oracle Pricing	Yes	"Setting up Pricing" section
Set up Oracle CRM Technology Foundation	Yes	"Setting up Oracle CRM Technology Foundation" section
Set up Oracle Trading Community Architecture	Yes	"Setting up Oracle Trading Community Architecture" section

Accessing the Applications

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

- **Oracle Application Object Library (AOL):**This technology stack is also known as Oracle Forms. See the "Accessing Oracle Forms" section, below.
- **Oracle CRM Login Servlet** This is the HTML login that you access from within an Internet browser. Microsoft Internet Explorer 5.5 (with cookies enabled) is the recommended browser setup for accessing the HTML-based applications. See the "Accessing Oracle E-Business Suite HTML Applications" section, below.

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

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

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

- *Installing Oracle Applications*
- *Upgrading Oracle Applications*
- *Oracle Applications Release Notes*

Visit My Oracle Support for these installation and upgrade documents.

Accessing Oracle Forms

Many setups for Oracle iStore and its dependencies require that you use Oracle Forms. Launch Oracle Forms by navigating to: `http://<host>:<port>/` and selecting Apps Logon Links, VIS Logon through the Forms cartridge.

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

Accessing Oracle E-Business Suite HTML Applications

To access the Oracle E-Business Suite HTML applications, navigate to: `http://<host>:<port>/oa_servlets/oracle.apps.jtf.base.session.CRMLogin`. This login is known as the CRM Login Servlet.

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

- Username = sysadmin
- Password = sysadmin

Responsibilities and Oracle Applications

All Oracle applications use the concept of user responsibilities for basic user security and application mapping. The responsibility a user logs in with will determine the application (and hence, the menus) that appear. Each responsibility is mapped to a menu structure in Oracle Forms. For information on Oracle iStore responsibilities, see the chapter, *Implementing User Management*, page 14-1, and the appendix, *Seeded User Data*, page B-1.

Install Software

Install the relevant Oracle Applications Release 12 patches. See My Oracle Support for Documentation Resources (Roadmaps). These documentation roadmaps will assist you in your installation.

Multi-Language Setup (MLS)

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

To install more than one language, see the following:

- *Installing Oracle Applications*
- *Oracle E-Business Suite Installation Guide*
- *Oracle E-Business Suite Concepts, Globalization*

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

Information on globalization and multiple organizations is contained in the chapter, *Implementing Globalization and Multi-Org Architecture*, page 17-1.

Setting up Oracle E-Business Tax

Oracle iStore integrates with Oracle E-Business Tax to display calculated tax information to customers. Following are the tax business objects supported (and displayed) in the shopping cart, order review and order details pages:

- Tax codes
- Tax rates

- Tax amounts

By default, Oracle iStore displays only cart-level tax data, but you can configure the pages to display tax data at the item level. For more information on setting up item-level tax display, see the "Tax Display in Shopping Carts" topic in the chapter, *Implementing Carts and Orders*, page 13-1.

Note: Integration with Oracle E-Business Tax requires Oracle Financials Family Pack, and Oracle Order Capture (ASO).

For more information on setting up and using Oracle E-Business Tax, see the *Oracle E-Business Tax Implementation Guide* and the *Oracle E-Business Tax User Guide*.

Setting up Oracle Trading Community Architecture

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

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

For more information on TCA, see the *Oracle Trading Community Architecture Administration Guide* and the *Oracle Trading Community Architecture User Guide*.

Setting up Country Address Formats

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

Guidelines for Oracle iStore

Keep the following guidelines in mind as you implement Oracle iStore.

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

Setting up Oracle General Ledger

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

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

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

Setting up Oracle Human Resources

Oracle Human Resources Management System (HRMS) stores information related to your organization. Use HRMS to set up employees and bill-to and ship-to countries. See the appropriate version of Oracle HRMS documentation for more information.

Setting up Oracle Inventory

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

In addition, several Oracle Inventory flags need to be set in order for products to display in the Oracle iStore Customer Application. See the chapter, *Implementing Products*, page 7-1, for Oracle iStore-specific product setup details.

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

Setting up Oracle Order Management

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

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

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

This guide contains limited information on setting up and using Oracle Order Management. See the Oracle Order Management documentation for more information:

Setting up Defaulting Rules

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

Prerequisites

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

Steps

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

After modifying the values, be sure to run the Build Attribute Mapping Rules concurrent program and bounce the middle-tier server.

See the "Supported Oracle Order Management Defaulting Values" section for a list of the defaulting parameters supported by Oracle iStore and Oracle Order Capture schema.

Supported Oracle Order Management Defaulting Values

The following are the defaulting values supported by Oracle iStore:

Cart (Header) Fields:

- invoice_to_org_id
- invoice_to_contact_id

- ship_to_org_id
- ship_to_contact_id
- request_date
- ship_from_org_id

Only if ASO: OM Defaulting = Y:

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

Item (Line) Fields:

- invoice_to_org_id
- invoice_to_contact_id
- line_type_id
- price_list_id
- ship_to_org_id
- ship_to_contact_id
- request_date
- schedule_ship_date

- promise_date
- ship_from_org_id

Only if ASO: OM Defaulting = Y:

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

Setting up Pricing

See the chapter, *Implementing Pricing*, page 11-1, for information about pricing setups.

Setting up Oracle CRM Technology Foundation

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

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

- Set up Host Configuration: See "Host Configuration", below
- Set up Cookie Properties: See "Cookie Properties", below
- Set up Look and Feel Property: See "Setting Look and Feel JTF Property", below
- Set up Component Caches: See "Component Caches for Oracle iStore in JTT" in the chapter, *Implementing Miscellaneous Internet-Related Features*, page 18-1

Host Configuration

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

Cookie Properties

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

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

Enabling cookie encryption is a mandatory setup step that involves specifying an encryption key while setting up cookie properties in Oracle CRM Technology Foundation.

To change the expiry settings for cookies, use the following steps:

1. Log in as System Administrator. Navigate to CRM HTML Administration, select Setup, and then select Settings. From Settings, select System, then select Properties and then Cookies.
2. Change the value for the **Expires After** and **Expiration Unit** fields. The default value is 60 days.
3. Click **Update**.

Clear your browser history to ensure that the cookies have the new expiry settings. Retest to confirm if the expiry time is set as defined in previous steps.

Setting Look and Feel JTF Property

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

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

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

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

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

Steps

The steps to set this property are:

1. Login as System Administrator to the CRM Login Servlet.
2. Navigate to Settings, System, Advanced. The Advanced - Properties page appears.
3. To set the property at the JTF/JTT application level:
 1. In the View droplist, select the Oracle CRM Technology Foundation application product code, `JTF`. (Press the Update button if necessary.)
 2. In the list that appears, select the hyperlink of the property, `LookAndFeel.cabo`.
 3. In the Key Details page, enter the following values:
 - Key** field = `LookAndFeel.cabo`
 - Value** (Sequence 0) field = `true`
 4. Select the Update button to save the changes.
4. To set the property at the IBE (Oracle iStore) application level:
 1. In the View droplist, select iStore's product code, `IBE`. If `IBE` is not in the list, see "Adding IBE to the View Droplist", below.
 2. Select the Create button.
 3. In the Create Key page, enter the following values:
 - Key** field = `LookAndFeel.cabo`
 - Value** (Sequence 0) field = `true`
 4. Click the Update button to save the changes.
5. When you are finished making the changes, log out of the sysadmin console, and log in as the iStore Administrator.

The Cabo Look and Feel should function properly.

- Also, make sure the following directories are globally writable:

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

Adding IBE to the View Droplist

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

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

See the latest *Oracle E-Business Suite CRM System Administrator's Guide*, for more information.

Optional Integrations with Oracle iStore

Several Oracle applications modules can be set up to provide additional functionality for your electronic sites. These are mentioned below. Refer to the relevant chapter and/or product documentation for more information.

Oracle Advanced Pricing

Use Oracle Advanced Pricing to set up customer discounts, sourcing rules, pricing qualifiers, and pricing modifiers. See the chapter, *Implementing Pricing*, page 11-1, for details.

Oracle Advanced Supply Chain

Use Oracle Advanced Supply Chain (Global ATP Server) to provide product availability information. See the chapter, *Integrating Oracle iStore with Oracle Advanced Supply Chain Planning*, page 21-1, for details.

Oracle Bills of Material

Use Oracle Bills of Material to set up configurable items, model bundles, and items with standard warranties for sale in your sites. See the chapter, *Integrating Oracle iStore with Oracle Bills of Material*, page 22-1, for details.

Oracle Call Center Technology

Use the Oracle Call Center Technology (CCT) suite of applications to process call-me-back requests. See the chapter, *Implementing Customer Assistance*, page 15-1, for more details.

Oracle Configurator

Use Oracle Configurator to enable customer configured products, provide guided selling, and perform some of the shopping cart validations. See the chapter, *Integrating Oracle iStore with Oracle Configurator*, page 23-1, for details.

Oracle Content Manager

Use Oracle Content Manager to provide a complete range of content item creation and management capabilities. See the chapter, *Integrating Oracle iStore with Oracle Content Manager*, page 10-1, for details.

Oracle Contracts

Integrate with Oracle Service Contracts to support the selling of serviceable items and related services in the Customer Application. Integrate with Oracle Sales Contracts to provide Terms and Conditions functionality in the checkout pages of the Customer Application. See the chapters, *Implementing Products*, page 7-1, and the *Integrating Oracle iStore with Oracle Sales Contracts*, page 30-1, for details.

Oracle Customer Care

The Oracle Customer Care suite of applications provides a complete view of the customer by displaying relevant customer information. Customer Care allows agents to alter customer data and create interactions with the customer. See *Oracle Customer Care Implementation Guide* for details.

Oracle iSupport

Use Oracle iSupport to provide self-service service request submission, order details views, return for credit authorizations, knowledge management, Install Base access, and user forums. Also integrate with Oracle iSupport to provide a unified Support dashboard for users of Oracle iStore and Oracle iSupport. See the chapter, *Integrating*

Oracle iStore with Oracle iSupport, page 25-1, for details.

Oracle Install Base

Use Oracle Install Base to maintain -- and allow customers to maintain -- a repository of purchase information, including purchase date, product attributes, and applicable service agreements. See *Oracle Install Base Implementation Guide* for details.

Oracle Marketing

Use Oracle Marketing to create and maintain products; define, execute, and manage marketing campaigns; and to track user events. See the chapter, *Integrating Oracle iStore with Oracle Marketing*, page 26-1, for details.

Oracle Partner Management

Use Oracle Partner Management to provide a unified Partner dashboard in the Oracle iStore Customer UI. See the chapter, *Integrating Oracle iStore with Oracle Partner Management*, page 27-1, for details.

Oracle Quoting

Use Oracle Quoting to create quotes that can be published to Oracle iStore sites, to provide contracts setup for Terms and Conditions, to capture carts as quotes when users request sales assistance, and to share quotes with other users. See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, for details.

Oracle Sales Applications

Use Oracle Sales and Oracle TeleSales to import sales leads from Oracle iStore orders and expired shopping carts. For more information on the Lead Import functionality of Oracle iStore, see the chapter, *Integrating Oracle iStore with Oracle Sales Applications*, page 29-1.

Oracle Shipping Execution

Use the Order Management module, Oracle Shipping Execution (SE), to calculate shipping charges, and to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing. The Oracle Shipping Execution module must be in place to enable post-order tracking and shipping detail views in Oracle iStore. See the chapter, *Integrating Oracle iStore with Oracle Shipping Execution*, page 31-1, for details.

Oracle Single Sign-On Server

Use Oracle Single Sign-On Server to provide single-authentication architecture. See the

chapter, Integrating Oracle iStore with Oracle Single Sign-On, page 32-1, for more information.

Oracle Workflow

Use Oracle Workflow to send HTML e-mail notifications and confirmations to customers and sales representatives. See the chapter, Integrating Oracle iStore with Oracle Workflow, page 34-1, for details.

Oracle Application Server Web Cache

Use Oracle Application Server Web Cache to serve the non-transactional Oracle iStore content. See the chapter, Integrating Oracle iStore with Oracle Application Server Web Cache, page 33-1, for details.

Implementation Overview

This chapter covers the following topics:

- Overview of Implementation Overview Chapter
- Implementation Process Description
- Required Implementation Tasks
- Advanced Tasks and Optional Integrations

Overview of Implementation Overview Chapter

This chapter provides an overview of required and optional setups with Oracle iStore, after you have verified your installation and dependencies in the chapter, *Verify Mandatory Dependencies*, page 2-1.

Implementation Process Description

Now that you have installed the mandatory dependencies to Oracle iStore, as described in the chapter, *Verify Mandatory Dependencies*, page 2-1, you can begin setting up your sites.

The steps required are:

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

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

Required Implementation Tasks

The following table lists the required implementation steps for getting a basic site up and running.

Required Implementation Tasks

Task	Reference
<i>Implement Mandatory Dependencies</i>	See the chapter, Verify Mandatory Dependencies, page 2-1 .
1) Set up the Site Administration Application.	See the section, "Setting up the Site Administration Application", in the chapter, Implementation Tasks for Oracle iStore, page 4-1.
2) Create a site.	See the section, "Creating Sites", in the chapter, Implementing Site Management, page 5-1.
3) Set up the Customer Application.	See the section, "Setting up the Customer Application", in the chapter, Implementation Tasks for Oracle iStore, page 4-1.
4) Test the site.	See the section, "Testing the Sites", in the chapter, Verifying the Implementation, page 19-1.

Advanced Tasks and Optional Integrations

After you have created a basic site, refer to later chapters for details of expanding your implementation. For a discussion of optional integrations, see the section, "Optional Integrations with Oracle iStore", in the chapter, Verify Mandatory Dependencies, page 2-1.

Implementation Tasks for Oracle iStore

This chapter covers the following topics:

- Overview of Implementation Tasks Chapter
- Setting up the Site Administration Application
- Setting up the Customer Application
- Testing the Sites
- Additional Implementation Tasks

Overview of Implementation Tasks Chapter

This chapter describes the tasks required to set up Oracle iStore after you have verified your installation and dependencies.

Setting up the Site Administration Application

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

Required tasks include:

- Set Initial Profile Options
- Set up Administrators
- Launch the Site Administration Application

Set Initial Profile Options

Set up by the System Administrator in Oracle Applications (Forms), profile options control the behavior of all Oracle Applications. Nearly every Oracle Applications profile

option begins with a 2- or 3-letter code that is tied to the application or functionality group which it controls.

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

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

For more information about Oracle Applications profile options in general, see *Oracle E-Business Suite Setup Guide*.

Set Oracle Applications CRM Profile Options

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

- `JTF_PROFILE_DEFAULT_APPLICATION`
- `JTF_PROFILE_DEFAULT_BLANK_ROWS`
- `JTF_PROFILE_DEFAULT_CSS`
- `JTF_PROFILE_DEFAULT_CURRENCY`
- `JTF_PROFILE_DEFAULT_NUM_ROWS`
- `JTF_PROFILE_DEFAULT_RESPONSIBILITY`

For more information, see the section, "Foundation Profile Options for HTML UI Setup", in the appendix, Profile Options, page A-1.

Set iStore Site Administration Application Profile Options

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

- IBE: Category Set
- IBE: Item Validation Organization

For more information, see the section, "Foundation Profile Options for iStore Administrator User", in the appendix, Profile Options, page A-1.

Set Multi-Org Profile Options

For multiple-organization architecture, set and/or verify the setting of the profile option, MO: Operating Unit. For more information, see the section, "Customer UI Mandatory Setup Profile Options", in the appendix, Profile Options, page A-1.

For more information on multiple organization architecture, see the chapter,

Globalization and Multiple-Organization Architecture, page 17-1, and the latest version of *Multiple Organizations in Oracle Applications*.

Set up Administrators

You must create a site administrator (referred to as store manager in previous releases) who will set up and test the sites in the Site Administration UI. See the section, "Set up iStore Administrator", below, for more information.

You also must create a concurrent programs administrator who will run concurrent programs. Initiated through Oracle Forms, concurrent programs are system programs that refresh certain data in the database. See the "Set up Concurrent Program Administrator" section, below, for details.

When a user with the iStore Administrator responsibility logs in to the Oracle CRM Login Servlet at: `http://host:port/oa_servlets/oracle.apps.jtf.base.session.CRMLogin`, the Site Administration Application opens.

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

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

Set up iStore Administrator

To set up a user account for the Oracle iStore site administrator, access the Users window in Oracle Forms (log in as System Administrator responsibility and select Security, User, Define).

After you create the user, set the following profile options at the user level:

- JTF_PROFILE_DEFAULT_APPLICATION
- JTF_PROFILE_DEFAULT_RESPONSIBILITY

See the section, "Foundation Profile Options for iStore Administrator User", in the appendix, Profile Options, page A-1, for more information.

Guidelines

Use the following guidelines to assist you in this task:

- In the User Name field, enter the user name that the site manager will use to log in to the Oracle iStore Site Administration UI. An example is IBE_ADMIN.
- In the Responsibilities block, choose iStore Administrator (key = IBE_ADMINISTRATOR) from the Responsibility LOV.

Set up Concurrent Program Administrator

To set up the iStore concurrent programs administrator, access the Users window in Oracle Forms (log in as System Administrator responsibility and select Security, User, Define). You can either add the concurrent program responsibility to the iStore administrator created above, or create a new user with the concurrent programs responsibility. Both methods work --- which avenue you take depends upon your business needs.

After creating a new user or updating an existing one, set the following profile option and parameter at responsibility level to the iStore Concurrent Programs Responsibility and any other Oracle iStore concurrent program manager responsibility being used. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.

- Set the Oracle Quoting parameter Default Order Type to Mixed.
- Set the profile option ASO: Validate Salesrep to No.

For information on the above profile option and parameter, refer to the appendix, Profile Options, page A-1.

Guidelines

Use the following guidelines to assist you in this task:

- If you are creating a new user, create the new user information and add the iStore Concurrent Programs Responsibility to the new user.
- If you are using an existing user, query up the user and add the iStore Concurrent Programs Responsibility to the user.
- Set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.

Launch the Site Administration Application

All site creation tasks are performed in the Site Administration Application. You can enter the Site Administration Application by logging in to: `http://<host>:<port>/oa_servlets/oracle.apps.jtf.base.session.CRMLLogin` with a user name that the system administrator has set up as an Oracle iStore site manager user account. See the "Set up Administrators" section for more information on creating a site manager user account. Verify that cookies are enabled for your browser before accessing the Site Administration Application.

Accessing the iStore Administrator's Profile Pages

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

Modifying Merchant Functions

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

1. Create a new responsibility for the user in the Application Object Library (AOL) module. For the new responsibility, you can assign the default menu, iStore Merchant user root menu (IBE_M_USER_ROOT), and still remove access to some of the tabs ("functions" in AOL terminology), or you can create a new menu using the Oracle iStore functions. All Oracle iStore functions can be found by searching for IBE_M_% in the Form Functions window.
2. In order to complete the menu setup (when creating a new responsibility) and avoid receiving an error message, you should assign both the new responsibility and the seeded responsibility, iStore Administrator, to the new user.
3. Next, set the new responsibility as the default responsibility of the new user. Do this by setting the profile option, JTF_PROFILE_DEFAULT_RESPONSIBILITY at the user level.

See *Oracle E-Business Suite Security Guide* for more information on creating users, managing responsibilities, and building menus.

Setting up the Customer Application

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

User registration is enabled by default in your sites. For more information, see the chapter, *Implementing User Management*, page 14-1.

The page that displays when customers initially approach your site is controlled by specific combinations of profile options. You do not need to change these profile options for users to access your sites. For information on customer landing page options, see the chapter, *Implementing Initial Customer UI Pages*, page 6-1.

The basic setup for enabling the Customer Application includes:

- Set up Guest User Access, page 4-6
- Set Mandatory Customer Application Profile Options, page 4-7

- Set up Time Zone Support, page 4-9

Important: It is a prerequisite to add and activate at least one site before accessing any of the Customer Application Web pages or Site Selection Page. Otherwise, an error will occur. See the chapter, Implementing Site Management, page 5-1, for site creation details.

Set up Guest User Access

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

Guest user is a seeded Oracle Applications (FND) user. The username and password can be found from the profile option, Guest User Password.

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

Steps

1. Log in to Oracle Forms with the System Administrator responsibility and select Security, User, Define. In the Users window that opens, search for the Guest user.
2. After finding the guest user, in the Responsibilities block, choose the seeded Oracle iStore customer responsibility, IBE_CUSTOMER, from the Responsibility LOV.
3. Save your changes.
4. Set the following profile options at the user level for the guest user name:
 - JTF_PROFILE_DEFAULT_APPLICATION -- Specifies the default application ID. Set to 671 for Oracle iStore.
 - JTF_PROFILE_DEFAULT_CURRENCY -- Specifies the default currency. Set to U.S. or other applicable currency.
 - JTF_PROFILE_DEFAULT_RESPONSIBILITY -- Specifies the default responsibility for the guest user's responsibility. Set to 22372 for the IBE_CUSTOMER responsibility.
5. Verify the guest user account, as described in the next section: "Verify the Guest User Account".

Verify the Guest User Account

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

Steps

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

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

Set Mandatory Customer Application Profile Options

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

You can also set other Oracle iStore (IBE) profile options for the Customer Application if you do not want to use the default settings. See the appendix, Profile Options, page A-1, for a complete list.

Set Mandatory Customer UI Profile Options

Enabling cookie encryption is a mandatory setup step. For additional information see Cookie Properties, page 2-11.

Mandatory iStore Customer Application Profile Options

Set the following mandatory IBE profile options at the iStore application level in order to configure the Customer Application. For more information, see the appendix, Profile Options, page A-1.

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

- **IBE: Pricing Event for Shopping Cart:** Set to Batch Processing.
- **IBE: Create Order in Entered State, if it has errors while booking:** Set to Yes.
- **IBE: Pricing Event--Before Shopping Cart:** Set to Enter Order Line.
- **IBE: Default Payment Term:** Set to the payment term that will be the default payment term for orders.
- **IBE: iStore Non Secure URL** and **IBE: iStore Secure URL:** See the chapter, Implementing Miscellaneous Internet-Related Features, page 18-1, and the

appendix, Profile Options, page A-1, for more information.

Mandatory Oracle Quoting/Order Capture Profile Options and Parameters

Set the following mandatory Oracle Order Capture and Oracle Quoting profile options to configure the Customer Application. Set these at the iStore application level, unless it is stated otherwise in the descriptions. For more information, see the appendix, Profile Options, page A-1. See also: *Oracle Order Management Implementation Manual* and *Oracle Quoting Implementation Guide*.

- **ASO: Automatic Numbering:** Set to Yes at site and application levels.
- **ASO: Credit Card Authorization:** Set to Yes if you are implementing online credit card authorization; otherwise, set to No.
- **ASO: Configuration Effective Date:** Set to the default effective date.
- **ASO: Copy Configuration Effective Date:** Set to the default effective date.
- **ASO: Default Quote Status:** Set to Store Draft.
- **ASO: Default Order State:** Set to Booked.
- **ASO: Enable TCA Changes:** Set to Yes.
- **ASO: OM Defaulting:** Set this to No or Yes, depending upon your configuration of Oracle Order Management and your business needs. For more information, see the section, "Setting up Defaulting Rules", in the chapter, Verify Mandatory Dependencies, page 2-1.

Set the following Oracle Quoting parameters:

- **Default Salesrep:** Set to the default sales representative for sales assistance.

For information on setting the parameters, see the "Oracle Quoting Integration Parameters" topic in the appendix, Profile Options, page A-1.

Other Mandatory Profile Options

Also set the following mandatory profile options:

- **Sequential Numbering:** Set to Always Used at site level. This profile option (which unlike other profile options has no product prefix, such as IBE or ASO), is required in the Oracle iStore orders process. Note that this profile also can be set to Partially Used and Not Used, but these values should not be used at site level. You may be able to set them at lesser levels. See the appendix, Profile Options, page A-1, for additional guidelines on this profile.
- **HZ: Generate Party Number** and **HZ: Generate Party Site Number:** Set to Yes at

iStore application level, in order to auto-generate party numbers and party site numbers.

Set up Time Zone Support

Oracle iStore supports the display of time zone data in its Customer Application pages and user e-mail notifications. These features are discussed in the sections that follow.

For more information on Time Zone Support other than that found here, see Time Zone Support, User-Preferred Time Zones in *Oracle E-Business Suite Setup Guide*.

Time Zone Display in Customer Application Pages

In Customer Application pages that display time-sensitive information (for example, order tracker pages), the server time zone will be displayed in text format on the page. The time zone will always be the time zone of the server running the database, and the display is retrieved dynamically using tokens. Following are examples of the text that displays:

- Time Zone (GMT +05:30)Calcutta
- Time Zone (GMT -08:00/-07:00)Pacific Time

Implementing Time Zone Display

Time zone text only display in Customer Application pages if the Oracle Applications profile option, `ENABLE_TIMEZONE_CONVERSIONS`, is enabled. See the Oracle Applications implementation documentation for more information.

Implementers can modify the text of the message that displays the time zone. The default text, "Time Zone ", can be changed by modifying the Oracle Applications message, `IBE_TIMEZONE_UI`.

Time Zone Display in E-Mail Notifications

Oracle Workflow automatically inserts time zone information into e-mail notifications. See the *Oracle Workflow Guide* for more information.

Customer Time Zone Preference

Users can set their preferred time zone in the Oracle iStore Customer Application by navigating to Profile > Preferences > General. User preference will not be reflected in Oracle iStore. However, setting preferred time zone will enable users to see date/time information in their preferred time zone in other applications which support user-preferred time zone, such as Oracle iSupport.

Testing the Sites

You should verify that the Customer Application works correctly before launching your sites. See the chapter, *Verifying the Implementation*, page 19-1, for detailed steps.

Additional Implementation Tasks

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

Additional Required and Optional Implementation Tasks

Task	Required?	Chapter
Create sites	Yes	Implementing Site Management, page 5-1
Verify or alter Customer Application initial landing page settings	No	Implementing Initial Customer Application Pages, page 6-1
Implement or verify products setup	Yes	Implementing Products, page 7-1
Set up pricing	Yes	Implementing Pricing, page 11-1
Set up the online catalog	Yes	Implementing the Catalog, page 9-1
Add content to sites	No	Implementing Content, page 10-1
Set up payment types and shipping methods	Yes	Implementing Payment Types and Shipping Methods, page 12-1
Configure carts and orders	No	Implementing Carts and Orders, page 13-1
Set up multicustomer access	No	Implementing User Management, page 14-1

Task	Required?	Chapter
Set up users	Yes	Implementing User Management, page 14-1
Set up customer assistance	No	Implementing Customer Assistance, page 15-1
Configure messages	No	Implementing Messages and Prompts, page 16-1
Set up global features	No	Implementing Globalization and Multi-Org Architecture, page 17-1
Set up Internet-related features	No	Implementing Miscellaneous Internet-Related Features, page 18-1
Integrate with other Oracle Applications	No	See the other chapters in this guide which detail how to integrate with other Oracle applications.
Implement or enable Product Comparison	No	Implementing Products, page 7-1

Implementing Site Management

This chapter covers the following topics:

- Overview of Implementing Site Management Chapter
- Site Management Overview
- Creating Sites
- Implementing Integrated Business Partner and Support Sites
- Privacy Policy
- Integrated Site Management Sample Business Flows

Overview of Implementing Site Management Chapter

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

This chapter assumes you have performed the required implementation tasks outlined in the chapters: Verify Mandatory Dependencies, page 2-1, and Implementation Tasks for Oracle iStore, page 4-1.

Site Management Overview

The Oracle iStore Site Administration Application is a complete online store management tool. Several concepts for site management are discussed the sections below. Site setup steps begin in the "Creating Sites" section, later in this chapter.

Introduction to Sites

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

For an introduction and overview of Oracle iStore, see the chapter, Introduction, page 1-1.

Using Oracle iStore sites, you can:

- Target different customer segments with different sites and catalogs
- Support globalization features, such as multiple languages and currencies
- Brand each site differently
- Provide different content for the same product on different sites
- Enable different payment and shipping methods for each site
- Set different price lists on each site for each user type (guest, B2C, B2B, and 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

You can also integrate your sites with the Oracle iSupport and Oracle Partner Management applications -- See the section, "Implementing Integrated Business Partner and Support Sites", within this chapter, to begin understanding the capabilities of this functionality.

Site Concepts

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

Additional Points

These additional points can aid your understanding of site creation and maintenance:

- You can create as many sites and specialty sites as you wish, all within a single instance.
- You can implement sites which support multiple languages and currencies.

- Each site can have multiple payment types and shipping methods enabled.
- Each site supports any number of responsibilities. However, you cannot use the same responsibility more than once per site.
- Each specialty site (site-responsibility combination) supports only one customer responsibility.
- The responsibility associated with a specialty site determines the operating unit (OU) against which any orders are placed (this association is made through the MO: Operating Unit profile option, set at responsibility level). Thus, sites are tied to OUs by the setting of this profile option at the responsibility level.
- The default Customer Application landing page is called the Site Selection Page. It displays all specialty sites that are accessible to the responsibilities of the users viewing the page, plus all sites that are public and not restricted by responsibility. If the customer can only access one specialty site, Oracle iStore automatically forwards the user to the Site Home Page of that specialty site, and the user does not see the list of specialty sites.

Site Group Navigation Logic and Guidelines

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

- If a user filters the list of sites by group and this group has only one site, Oracle iStore automatically forwards the user to the Site Home Page of that site.
- You can direct users to a group through a URL. If you direct a customer to the Site Selection Page through the URL:
 - The specific group is displayed in the Site Selection Page.
 - If the group contains only one accessible specialty site, the user is forwarded to the Site Home Page of the site.
 - If the URL specifies a non-existent group, all sites are displayed instead of sites within the group.

- URL direction parameters can have a group code (non-translatable), but not a group name.
- The group code is case-sensitive and can be lower case. All seeded groups are upper case.
- If one group is included in only one site, and/or the site only supports one language, when users navigate to the Site Selection Page using a group specified in a URL, Oracle iStore redirects the user to the site within that group automatically.
- The syntax for directing users to a group should be `http://.../OA_HTML/ibeCZzdMinisites.jsp?grp=<group_code>`.

See the following sections for additional information:

- "Implementing Integrated Business Partner and Support Sites" within this chapter
- "Group Picker" within the chapter, Implementing Initial Customer Application Pages, page 6-1
- "Group Bins" and "Custom Group Bins" in the chapter, Implementing the Catalog, page 9-1
- "Site Group Names Lookup" in the chapter, Implementing Messages and Prompts, page 16-1

Creating Sites

This section details how to create sites.

Create a Site: Getting Started and Entering Basic Information

You begin the site creation process by entering basic information for a site, such as name, description, and default parameters. To remove a site from operation, you must end-date it.

To start site creation, log in to the Site Administration Application as iStore Administrator, and select Create a Site in the Sites page.

Guidelines

Use the following guidelines as you start building a site:

- **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. See the chapter, Advanced Display, page 36-1, for information on

this feature.

- **Start/End Dates:** Start and end dates can also be controlled by setting supported responsibility start/end dates.
- **Default Language:** This step is expanded in the section, "Create a Site: Assigning Languages", within this chapter.
- **Default Currency:** This step is expanded in the section, "Create a Site: Assigning Currencies", within this chapter.
- **Default Walk-in Price List:** This step is expanded in the section, "Create a Site: Assigning Price Lists", within this chapter.
- **Catalog Root Section:** All sites are referenced against a single parent node (or browsing section), which may or may not have child sections. If the root section has both navigational and featured subsections, the featured subsection won't be displayed in catalog pages. Only the following types of sections should be assigned as site root sections:
 - Sections which contains at least one navigational subsection
 - Sections which are leaf sections (contain only products, not subsections)
 - Sections which only have featured subsections; Oracle iStore does not support this
 - Unpublished or non-active sections, as this will cause incorrect rendering in the Customer UI

See the section, "Creating and Maintaining Sections", in the chapter, Implementing the Catalog, page 9-1, for additional guidelines.

- **Allow un-registered users to browse the site:** By selecting this flag, all specialty sites within this site will allow guest user access.
- **Allow customers to check item availability:** By selecting this flag, you enable customers to check Available to Promise (ATP) information for items in their carts. Do not select this unless you have set up either regular or global ATP.
- **Restrict customer access by responsibility:** By selecting this flag, all specialty sites within this site will check customer responsibility as customers approach the default landing page, the Site Selection Page. In this case, only those specialty sites whose supported responsibilities match that of the approaching customer display on the page.
- **Enable Threshold for Payment Types:** This is one of the steps to enable the Payment Threshold feature. For more information, see the topics, "Create a Site:

Setting Payment Threshold", below, and "Enabling Payment Thresholds" in the chapter, Implementing Payment Types and Shipping Methods, page 12-1.

- **Viewing sites by status:** By default, only active sites appear in the Sites page. To view inactive sites, select Inactive Sites or All Sites from the Search LOV.
- **Customer Application display:** None of the fields entered in the site creation page display in the Customer Application.
- **Site ID:** Upon creation, your site will be given a unique Site ID number, which you can view in the Update Site: Details page. Site ID is the same as the Minisite ID.
- **Altering parameters after creation:** All fields (except Site ID) can be altered after the site is saved.

Create a Site: Assigning Languages

Your implementation will be installed with a single language known as the *base language*. The base language cannot be changed or deleted from the Site Administration Application. Languages in addition to the base language must be first installed and implemented in Oracle Applications before they will appear in the Site Administration UI. In addition, your implementation must be multiple-organization enabled. See the chapter, Implementing Globalization and Multi-Org Architecture, page 17-1, for more information.

To assign additional languages, in the Site Administration Application, update a site and select the Language hyperlink.

Guidelines

Use the following guidelines as you assign languages:

- To disable a language, select the radio button of the language and press the Change Status button.
- The status of the base language cannot be changed.
- When you disable a language in the Site Administration Application, this does not remove any Display Template or media object mappings you have set up using the language.

Create a Site: Assigning Currencies

Currencies must be set up in Oracle General Ledger before they can be selected in the Site Administration Application. See the *Oracle General Ledger User Guide* for more information.

To assign currencies, in the Site Administration Application, update a site and select the

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

Create a Site: Assigning Price Lists

Price lists must be set up in the pricing application before they can be selected in the Site Administration UI. Since the iStore Administration Application is not operating unit (OU) aware, the list of available price lists displays all existing price lists. If a price list is set up as OU-specific, then be sure to associate this price list only to sites whose associated customer responsibilities are linked to the OU where the price list is enabled.

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

To assign currencies, in the Site Administration Application, update a site and select the Pricing hyperlink.

Guidelines

Use the following guidelines as you assign price lists:

- The price lists selected in the Pricing page are used to fetch prices only when the pricing is site-based (i.e., IBE: Use Price list Associated with Specialty Site is Yes).
- For each supported currency, choose the price lists for Walk-in Customers (guest users), Individual Customers (B2C users), Business Customers (B2B users), and Partners (Oracle Partner Management end users).
- If multi-currency price lists are enabled, you can choose the same price list for a different currency.
- You cannot remove the default currency.

Create a Site: Assigning Payment Types

Payment types must first be set up in Oracle Applications before they can be selected in the Site Administration Application. Only the payment types supported by a site will display in the Customer Application.

To assign currencies, in the Site Administration Application, update a site and select the Payment hyperlink.

Guidelines

Use the following guidelines as you assign payment types:

- **Ask for Purchase Order:** If checked, users can enter purchase order numbers during checkout for all specialty sites within this site. This enables the Purchase Order textbox in the checkout pages.

- **Use Purchase Order when Below Payment Threshold:** This enables the purchase order textbox for orders that are below the payment threshold specified. If left unchecked and the order amount is below the payment threshold specified, the purchase order textbox will not display, even if the *Ask for Purchase Order* checkbox is checked.

Create a Site: Assigning Shipping Methods

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

To assign shipping methods, in the Site Administration Application, update a site and select the Shipping hyperlink.

Create a Site: Assigning Responsibilities (Creating Specialty Sites)

You must assign at least one customer responsibility to a site. Each iteration of a site plus a responsibility makes a specialty site.

To assign responsibilities, in the Site Administration Application, update a site and select the Responsibility hyperlink.

Guidelines

Use the following guidelines as you assign responsibilities:

- The display names you select in this phase of the site building process appear in the Customer UI as the specialty sites' display names.
- A single Customer Application responsibility is seeded for the default customer user; it is IBE_CUSTOMER. This responsibility is associated to all available Oracle iStore user types by default during registration. When you create a site, IBE_CUSTOMER is assigned to the site by default.
- Oracle iStore also supports using Oracle iSupport and Oracle Partner Management responsibilities for Customer Application users. If you wish to assign other responsibilities to customers, you must change user types setup, defining new Oracle CRM User Management enrollments associated to the user types and mapping the corresponding responsibilities to the appropriate sites. See the chapter, *Implementing User Management*, page 14-1, for more information.
- You can only use the same responsibility once per site.

Create a Site: Manually Ordering Specialty Site Display Names

Oracle iStore allows you to manually re-order the display order of the specialty sites in

the Site Selection Page.

To set display order, in the Site Administration Application, update a site, select the Responsibility hyperlink, and then the Display Order button.

Guidelines

Use the following guidelines as you order display names:

- If not manually ordered, specialty sites are arranged in case-insensitive, alphabetical order at runtime in the Customer Application.
- The order is set across all specialty sites in your instance.
- The profile option, IBE: Use Display Order Feature, must be Yes to use the display order feature (the default value is Yes). See the appendix, Profile Options, page A-1, for more information on the profile option settings.

Create a Site: Assigning Order Types

Oracle iStore allows you to assign an Order Type for a Site and Responsibility combination on the Site Administration Responsibility page. You can search and select an active order type from a list of values specified in the Order Type column defined in Order Management. Order Type is an optional field, and can be left blank on the Site Administration Responsibility page. If the order type is left blank, then the value set for the IBE: Default Order Type iStore profile option will be used when placing an order. If there is no value specified for the IBE: Default Order Type iStore profile option, then the value set for the Oracle Quoting parameter will be used when placing an order. For more information on the IBE: Default Order Type iStore profile option, see the appendix, Profile Options, page A-1. For more information on the Oracle Quoting parameter, see the *Oracle Quoting Implementation Guide*.

Guidelines

To define an order type associated with a Site and Responsibility combination in the Site Administration Application, select an iStore site, then select the Responsibility hyperlink, and then click on the Order Type Search icon. This enables merchants to define the default Order Type for a minisite without having to rely on the IBE: Default Order Type iStore profile option. Use the following guidelines to search and select the Order Type:

- Select the Order Type Search icon for a specified Site and Responsibility combination for the selected minisite.
- Enter either the default Order Type Name or the Order Type Description on the Search and Select Order Type List of the Value window.
- The search result will display all active Order Types across all Operating Units

regardless of the MOAC rules.

- Select a valid Order Type for the Site and Responsibility combination.
- Save the changes.

Create a Site: Assigning Groups

Oracle iStore allows you to organize specialty sites into groups. Grouping sites is useful for many reasons, as described in the guidelines below.

To assign sites to groups, in the Site Administration Application, update a site, select the Responsibility hyperlink, and then the Assign Groups icon in the appropriate row.

Guidelines

Use the following guidelines as you assign groups:

- The Site Selection Page in the Customer UI displays the specialty sites within a site according to groups that you place them in. You also can assign a single specialty site to multiple groups.
- Supplied Group Bins: The following are the seeded group bins :
 - Store -- You can use this group to contain all specialty sites you wish associated with Oracle iStore.
 - Support -- You can use this group to contain all specialty sites you wish associated with Oracle iSupport.
 - Partner -- You can use this group to contain all specialty sites you wish associated with Oracle Partner Management.
- Implementers may wish to set up navigation bins which display the specialty sites within the groups in the catalog pages. See the section, "Group Bins", in the chapter, Implementing the Catalog, page 9-1, for more details.
- The Site Selection Page can only display groups and the specialty site picker if you set the profile option, IBE: Maximum Columns in Specialty Site Page. See the section, "Setting up Site Selection Page Columns", in the chapter, Implementing Initial Customer Application Pages, page 6-1, for details.
- If no site is associate to a group, all sites are displayed without categorization in the Site Selection Page, and the Group LOV is not displayed. Additionally, if all sites are associated to only one group, the Group LOV does not display.
- The site group names are extensible lookups for which you can change values and/or disable. See the chapter, Implementing Messages and Prompts, page 16-1,

for more information.

- Groups can be displayed in navigation bins on site pages.
- When a specialty site is not associated with a group (or if a group is disabled that had contained sites), it will show up in the uncategorized Others group on the Site Selection Page.
- If a group name has been disabled, it will not appear in the page.

See also: "Site Concepts" section within this chapter

Create a Site: Setting Organization Access Restrictions

Access restrictions allow you to control a B2B user's access to the Customer Application based on his organization.

To set organization access restrictions, in the Site Administration Application, update a site and select the Access hyperlink.

Guidelines

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.

Create a Site: Setting Payment Threshold

Payment Threshold functionality allows you to enable only certain payment types in your specialty sites when a user places an order whose amount is under the threshold amount. See the section, "Using Payment Types Threshold", in the chapter, Implementing Pricing, page 11-1.

Implementing Integrated Business Partner and Support Sites

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

- Support for Oracle iSupport and Oracle Partner Management users in the Customer Application
- Ability to specify price lists for partner users in the Site Administration Pricing page.

- Fully integrated navigation between Oracle iStore, Oracle iSupport, and Oracle Partner Management applications through a common dashboard in the Customer Application. For example, to access Oracle iSupport or Oracle Partner Management from the Customer Application, users can select any number of implemented Oracle iSupport or Oracle Partner Management links in the Quick Links bin to navigate to specific areas of these integrating applications. To navigate back to the Customer Application, users simply select the Return to Dashboard navigation icon.
- Configurable Site Selection Page which shows all specialty sites by group and allows filtering by site group
- Site grouping functionality, allowing implementers to group sites logically on the Site Selection Page to ease navigation, as well as the ability to assign a single specialty site or sites to several groups. For this purpose, group lookups are provided.
- Seeded group navigation bins that allow users to navigate to other sites within a specific group. These bins can support navigation to custom groups as well.
- Navigation icon called Sites that customers can access to return to the Site Selection Page from other areas of the Customer Application
- Ability to keep currency and language context when navigating between participating applications
- Support for permission and responsibility checking in the Customer Application for users of the integrating applications
- Ability for B2B users to switch accounts in Oracle iStore pages
- Common user registration pages and flow for participating applications
- Support for Partner registration flow and Partner permission checking in the Customer Application
- Common user profile screens that are configurable by application -- participating applications can display their own user personal information screens by setting an iStore profile option and linking their menu structures
- Full support for and data consistent with the Oracle Trading Community Architecture model

For more information on the integrations with Oracle iSupport and Oracle Partner Management, see the chapters: Integrating Oracle iStore with Oracle iSupport, page 25-1, and Integrating Oracle iStore with Oracle Partner Management, page 27-1.

Navigation Behavior with Integrated Applications

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

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

The Login, Logout, and Register icons call Oracle iStore processing pages and direct users to Oracle iStore pages, following Oracle iStore logic. The Dashboard icon allows users to return to the Dashboard (Customer Application).

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

Privacy Policy

Implementers can institute a privacy preference policy in the Customer Application. The policy consists of a hyperlink displayed in the Customer Application pages which then leads users to a page displaying a standard privacy statement.

Privacy Policy Process Flow

Following is the process flow for the privacy policy in the Customer Application:

1. A user selects the Privacy Statement link present on all Customer Application pages.
2. The user views the contents of the privacy statement.

3. When done viewing the privacy statement, the user selects a global icon to navigate to other areas of the Customer Application.

Implementing Privacy Policy

Use the steps in this section to set up the Privacy Policy feature.

Step 1 - Set Profile Option

Set the profile option, IBE: Display Privacy Statement, to Yes at site level, to enable the Privacy Statement link.

Step 2 - Map Policy Statement to Media Object

Oracle iStore provides a JSP that includes a media object and the update preferences link. The media object is called: Store Privacy Statement. The programmatic access name is STORE_PRIVACY_STATEMENT. The media object has the following default content: *You need to customize this page to display your privacy statement.* To provide a unique privacy statement, create an HTML file and map it to the media object. For instructions how to map media objects to files, see the chapter, Implementing Content, page 10-1.

Integrated Site Management Sample Business Flows

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

- "User Navigates to Integrated Applications from Single Shared Site"
- "Partner Navigates to Integrated Applications from Multiple Sites"

User Navigates to Integrated Applications from Single Shared Site

Note that this sample scenario assumes: Your implementation navigates users to the Site Selection Page by default (see the chapter, Implementing Initial Customer Application Pages, page 6-1, for information on the default landing page options), and that the user is already registered.

1. A user approaches the Web site.
 - If only one site is available to the user, he is forwarded to the Site Home Page as a guest user. From this page, he can log in and access the Site Home Page as a logged-in user.
 - If a multiple sites are available to the user, the user can select a site from the Site Selection Page, and if guest user access is allowed, he is taken to the Site Home

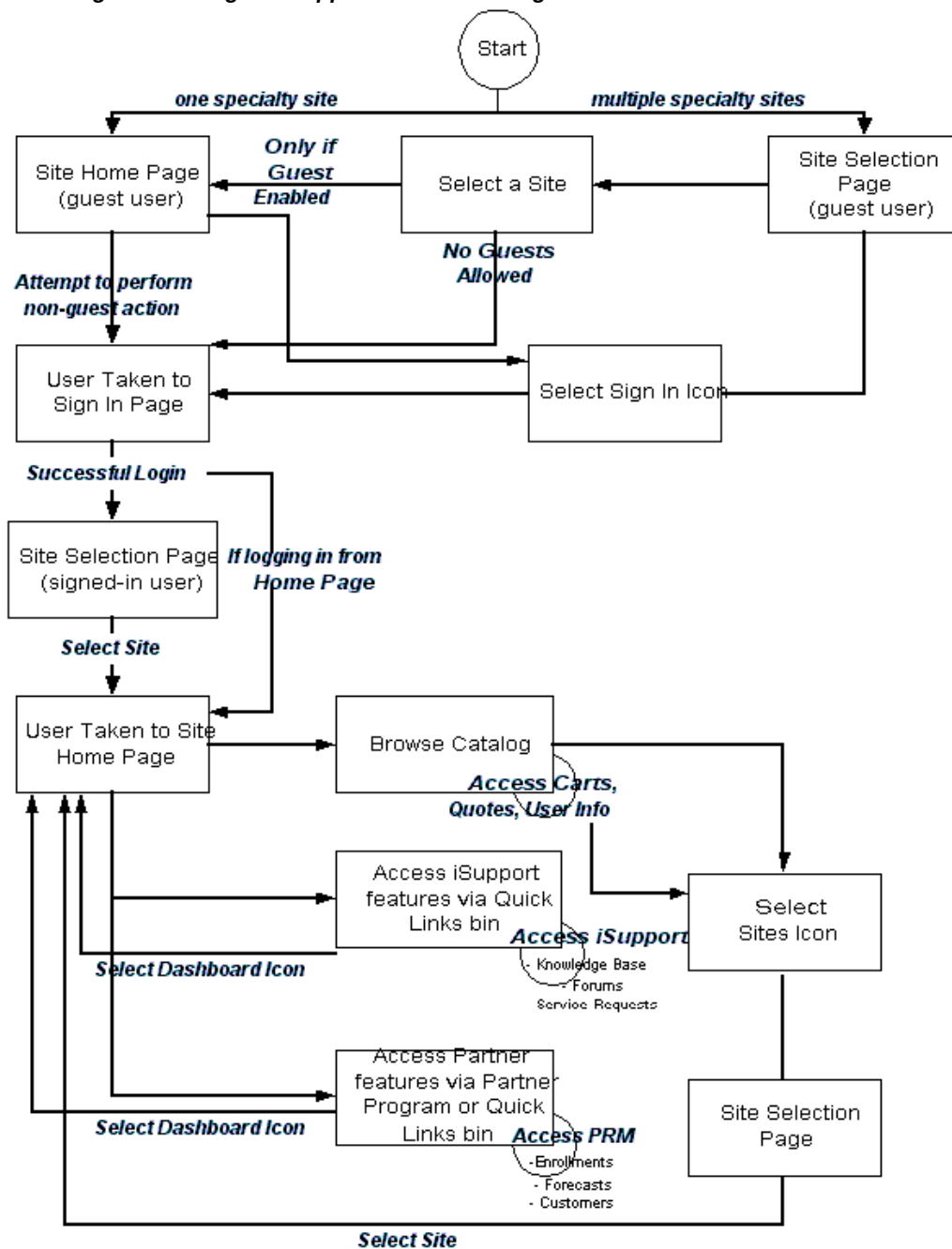
Page as a guest user. From here, he can sign in and access the Site Home Page as a signed-in user.

- The user also can log in from the Site Selection Page. In this case, after login, he is re-directed to the Site Selection Page, where all available sites are displayed. Then he can select a site and access the Site Home Page as a signed-in user.
 - If no guest user access is allowed in any sites, or if the user has elected to log in, then the Login page is displayed.
2. Assuming that the site is associated to a responsibility that integrates Oracle iStore, Oracle iSupport and Oracle Partner Management the user can:
- Select the Partner Program link in the Partner Program Bin and navigate to program enrollments.
 - Navigate to Oracle iSupport through the Quick Links navigation bin displayed under the Support tab. In Oracle iSupport, he can access service requests, the knowledge base, and forums, depending upon how Oracle iSupport is implemented. He can return to the Site Home Page by selecting the Dashboard navigation icon from Oracle iSupport.
 - Navigate to Oracle Partner Management through the Quick Links navigation bin displayed under the Partners tab. In the Oracle Partner Management application, he can access opportunities, customers, and forecasts, depending upon the Oracle Partner Management implementation. He can return to the Site Home Page by selecting the Dashboard navigation icon from Oracle Partner Management.
 - Browse the catalog, potentially adding products to shopping carts and placing orders.
 - Select the Sites navigation icon to access additional sites, if additional sites are available to him.

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

The following figure shows this flow.

User Navigates to Integrated Applications from Single Shared Site



Partner Navigates to Integrated Applications from Multiple Sites

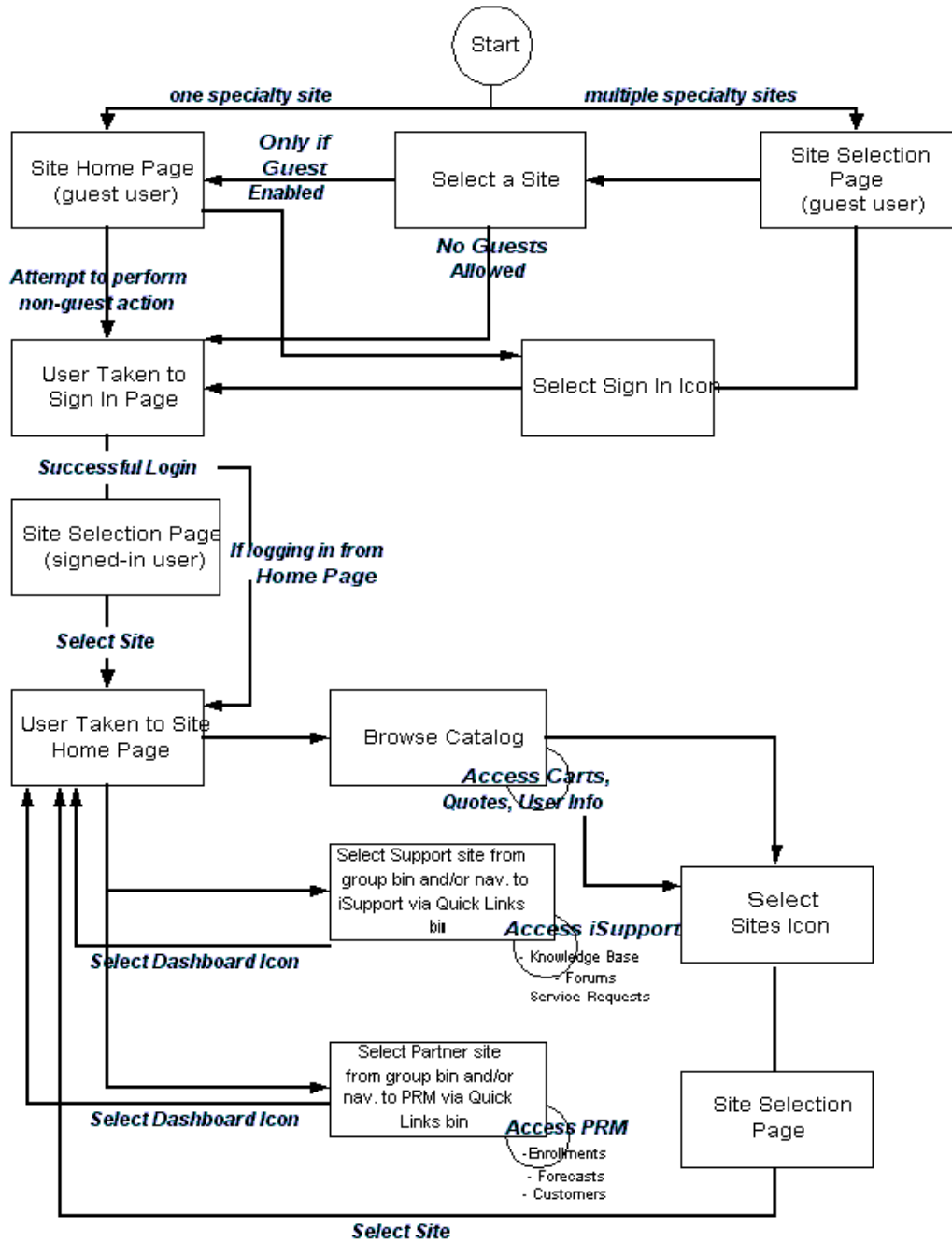
Note that this sample scenario assumes: Your implementation navigates users to the Site Selection Page by default (see the chapter, Implementing Initial Customer Application Pages, page 6-1, for information on the default landing page options), and

that the user is already registered.

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

The following figure shows this flow.

Partner Navigates to Integrated Applications from Multiple Sites



Implementing Initial Customer Application Pages

This chapter covers the following topics:

- Overview of Implementing Initial Customer Application Pages Chapter
- Customer Application Overview
- Site Selection Page
- Site Home Page
- Initial Landing Page Icons and Other Elements

Overview of Implementing Initial Customer Application Pages Chapter

This chapter provides an introduction to the Oracle iStore Customer Application and describes how the initial (start or landing pages) are implemented. Implementing the catalog is described in the chapter, *Implementing the Catalog*, page 9-1.

Customer Application Overview

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

Site creation is described in the chapter, *Implementing Site Management*, page 5-1.

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

- Send users to the Site Selection Page as their initial landing page. This page shows a list of specialty sites accessible to the user. By default, this will be the page that displays specialty sites in your implementation.

- Send users to a specialty site's home page, called the Site Home Page.

Customer Application Terminology

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

- **Account Switcher:** This is a bin that allows customers to switch accounts in the catalog. See the section, "Account Switcher", within this chapter, for more information.
- **Browse Bin:** Displayed by default on the left side of the Site Home Page, the Browse Bin allows users to navigate to sections within the specialty site. See the section, "Browse Bin", within this chapter, for more information.
- **Global Bin:** The Global Bin displays a currency picker, and can display other elements. See the section, "Global Bin", within this chapter, for more information.
- **Group Picker:** The Group Picker is a list-of-values (LOV) that displays on the Site Selection Page and allows users to filter the display of groups on the page. See the section, "Group Picker", within this chapter, for more information.
- **Guest User:** This is a user who is not logged in, and is also called a walk-in user. Unless a particular site does not allow walk-in users, this user can browse, configure items, and add items to his cart, but cannot place orders without registering. See the section, "Set up Guest User Access", within the chapter, Implementation Tasks for Oracle iStore, page 4-1, for more information.
- **Language List:** This is the list of supported languages across the top of the Specialty Site Page. Each language is an image link allowing users to switch their current session language. See the sections, "Language List" and "Language Images", within this chapter, for more information.
- **Language Links:** The Language Links are the hyperlinks that show the available languages for a specialty site. They display beneath each specialty site in the Site Selection Page. Each hyperlink represents a specific language. See the section, "Language Links", within this chapter, for more information.
- **Navigation Icons:** Several universal navigation (or global) icons display at the top of the Site Selection Page. Many of these also display at the top of the Site Home Page. See the section, "Navigation Icons", within this chapter, for more information.
- **Preview Mode:** Oracle iStore's Preview mode allows merchants to preview Customer Application specialty sites while working on them in the Site Administration Application. To use preview mode, select the Preview button on applicable pages. In preview mode, all products and sections within a specialty site --- both published/unpublished and active/inactive --- are viewable from the Site Administration Application. Site setup changes can be seen immediately. See the

chapter, Verifying the Implementation, page 19-1, for more information.

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

Site Selection Page

The Site Selection Page shows all specialty sites that are accessible to the user in case-insensitive, alphabetical order (unless you have manually ordered the names). Which

specialty sites display is based on user responsibility and access restrictions enabled during setup. An exception to this rule is for users whose accounts are not set up or have been disabled; in this case, the page will show all guest-accessible sites, and then when a user attempts to access a non-public page, the Online Access to Existing Account flow will be invoked.

Site Selection Page Overview

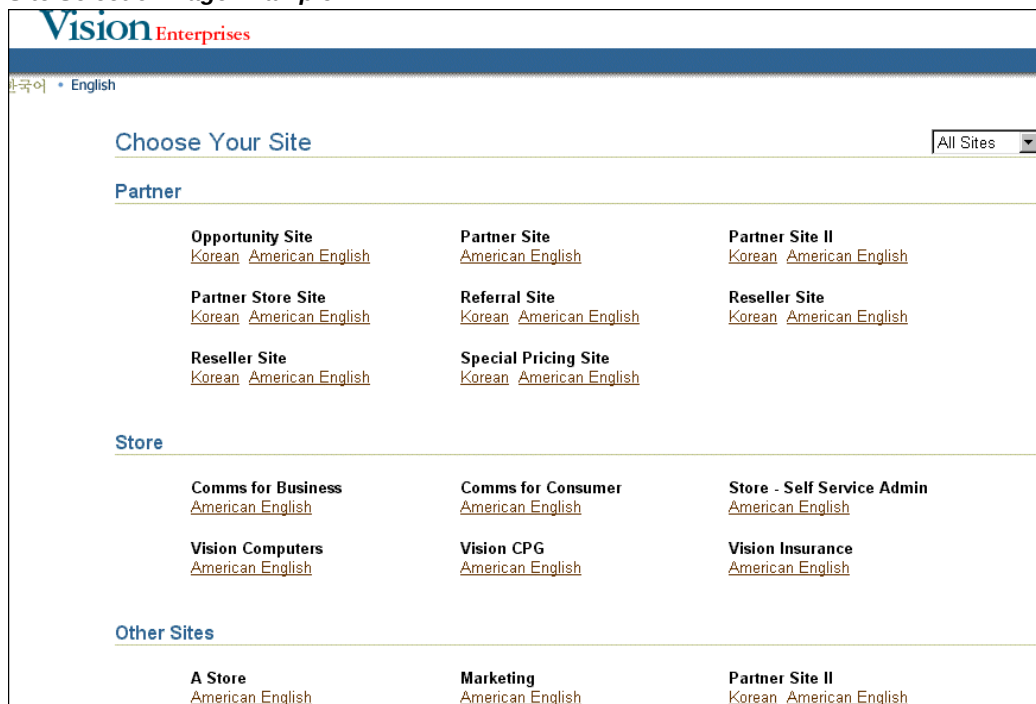
The Site Selection Page is the initial landing page by default for the Customer Application. The page is enabled by setting the profile option, IBE: Use Specialty Sites Selection Page, to Yes (this is the default value). The Site Selection Page contains the following elements:

- Sites accessible to the user viewing the page; these can be grouped by type of site (Store/Partner/Support are seeded)
- Language links shown near the site links, for supported languages
- Bin placeholders (top, bottom, right, left, middle, and center bins); the top and bottom bins by default allow navigation to areas of the Customer Application
- Language selector for changing language preference
- Group Picker (only displays if multiple groups are implemented); the Group Picker is tied to the central bin placeholder.

Note: If you implement the Site Selection Page in a single-column layout, the only element displayed in the page is a site selection LOV. You must implement it in multiple columns in order for the other elements to appear. See the section, "Setting up Site Selection Page Columns", below, for more information.

The following screen shot shows an example of the Site Selection Page.

Site Selection Page Example



Languages Implemented

In a multiple-language implementation, the specialty sites that are available will include one or more language links underneath them. Each language link displays the name of a supported language. Users select the appropriate language link to enter the specialty site. See the section, "Language Links", within this chapter, for more information.

In a single-language implementation, the Site Selection Page displays a single drop-list of available sites. This display can be controlled by setting a profile option. See the section, "Setting up Site Selection Page Columns", within this chapter, for details.

See the chapter, Globalization and Multiple-Organization Architecture, page 17-1, for more information on languages implementation.

Site Selection Page Images

A logical image placeholder (media object, STORE_LOGO_SPECIALTY) is provided next to each specialty site name in the Site Selection Page. By default, no image is mapped to this media object, allowing implementers to provide their own images. To provide images for the Site Selection Page, map each logical media name at the site level to the image you wish to display. See the chapter, Implementing Content, page 10-1, for information on how to map the placeholder to a content file.

The following figure shows an examples of images that could be provided for sites in

the Site Selection Page. The image placeholders are located to the left of each specialty site name.

Site Selection Page Images Example



Bins on Site Selection Page

As with catalog, user registration, and shopping cart pages, the Site Selection Page contains bin placeholders to which you can map your own JSP content. See the chapter, Implementing the Catalog, page 9-1, for information on how to map the content to the bins.

Additional Information: If you implement the Site Selection Page in a single-column layout, bins mapped to content will not display. See the section, "Setting up Site Selection Page Columns", below, for more information.

The following table shows the bin data:

Site Selection Page Bins

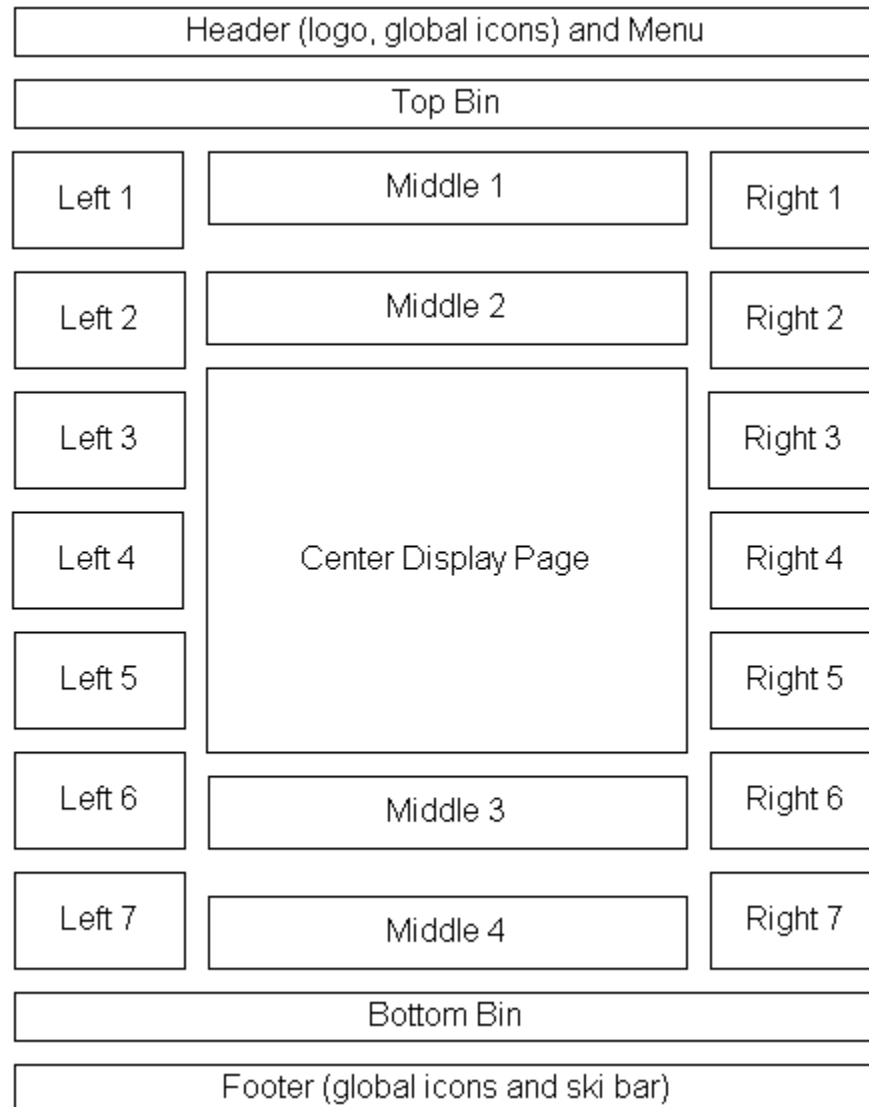
Name	Programmatic Access Name	Default Mapping
Site Selection Bin Left 1 to Site Selection Bin Left 7	SITE_SELECTION_BIN_LEFT_1 to SITE_SELECTION_BIN_LEFT_7	None
Site Selection Bin Right 1 to Site Selection Bin Right 7	SITE_SELECTION_BIN_RIG_HT_1 to SITE_SELECTION_BIN_RIG_HT_7	None
Site Selection Bin Top	SITE_SELECTION_BIN_TOP	Global icons (Sites, Login, Register), logo and blue bar
Site Selection Bin Bottom	SITE_SELECTION_BIN_BOT TOM	Global links (Sites, Login, Register)

Name	Programmatic Access Name	Default Mapping
Site Selection Bin Middle 1 through Site Selection Bin Middle 4	SITE_SELECTION_BIN_MID DLE_1 to SITE_SELECTION_BIN_MID DLE_4	None

For additional details on these bins, see the appendix, Seeded Display Data, page C-1.

The following graphic shows the bin locations:

Site Selection Page Bins



Integration with Other Oracle Applications

If integrating with other applications, (for example, Oracle iSupport or Oracle Partner Management), the Site Selection Page can display specialty sites by group, and allows users to filter the display by group. See the section, "Implementing Integrated Business Partner and Support Sites", in the chapter, *Implementing Site Management*, page 5-1, for more information.

Setting up Site Selection Page Columns

The Site Selection Page can display specialty sites in multiple columns, or it can display a single drop-list of available specialty sites. The number of columns that displays depends upon the value of the profile option, IBE: Maximum Columns in Specialty Site Page. See the appendix, *Profile Options*, page A-1, for more information on the profile settings.

As a best practice in the case of a multiple-language implementation, you could set up the page with multiple columns. This allows all of the specialty sites and language links to display across the page. To enable the Site Selection Page in multiple columns, set the profile option to an integer greater than zero. It is recommended that you set it to a reasonable number of columns for a web page, such as 2 or 3.

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

Important: If you implement the Site Selection Page in a single-column layout, the only element displayed in the page is a site selection LOV. You must implement it in multiple columns in order for the other elements to appear. See the *Site Selection Page Overview* section, above, as well as other sections within this section, for more information about the items that display on the Site Selection Page.

The following figure shows how the Site Selection Page might look in an implementation of Oracle iStore with multiple-columns enabled.

Site Selection Page in Multiple Columns Example

Choose Your Site All Sites

Partner

Opportunity Site Korean American English	Partner Site American English	Partner Site II Korean American English
Partner Store Site Korean American English	Referral Site Korean American English	Reseller Site Korean American English
Reseller Site Korean American English	Special Pricing Site Korean American English	

Store

Comms for Business American English	Comms for Consumer American English	Store - Self Service Admin American English
Vision Computers American English	Vision CPG American English	Vision Insurance American English

Other Sites

A Store American English	Marketing American English	Partner Site II Korean American English
--	--	---

Preview Mode and Site Selection Page

Preview mode is supported for the Site Selection Page. Following are the rules:

- The iStore administrator can preview the page from the Site Administration Application in his current language. Further, he can select any available language on the Site Selection Page and then preview the site in that language. When he navigates back to the Site Administration Application, he will see the UI in the new (last used) language.
- In preview mode, global icons are disabled in the Site Selection Page. However, if the administrator can still use the global icons from the catalog pages in preview mode.
- In preview mode, when the iStore Administrator selects the Site button from the catalog pages, iStore shows all sites (even those that have been end-dated).

Additional Site Selection Page Functionality

Following are some additional points about Site Selection Page behavior:

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

- Sites which do not allow guest user access will display an asterisk (*) near their display name; users are required to log in to access these sites. Guest user access is controlled by the flag, *Allow un-registered users to browse the site*. This flag is enabled during site setup.
- Guest users approaching this page will be redirected to the Login page if no guest-accessible specialty site is available.
- If the profile option, IBE: Use Specialty Sites Selection Page, is No, customers will be redirected to the Site Home Page. In this case, the default specialty site will be picked up from the profile option, IBE: Default Specialty Site.
- The profile option, IBE: Use Display Order Feature, controls whether you can manually set the display order of Site Selection Page specialty sites.
- When the site administrator is viewing the Customer Application in site Preview mode, this page displays all specialty sites that are accessible to the administrator's current session language.
- The Site Selection Page provides a static link to the Site Home Page, `ibeCZzpHome.jsp`, except in certain deep link scenarios.

Site Home Page

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

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

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

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

The following figure is an example of the Site Home Page. In the example image, the Vision Enterprises logo displays at the top of the screen, along with the following global navigation icons:

- Sites -- This icon takes users to the Site Selection Page.
- Cart -- This icon takes users to the Cart menu, where they can access saved carts, shared carts, and quotes.
- Orders -- This icon takes users to the Order Tracker menu, where users can access

information about orders they have placed.

- Profile -- This icon takes users to their profile pages, where they can view and update their contact information.
- Logout -- This icon logs users out of the application. If the user is not logged in, then the icon will display Login.
- Help -- If enabled by the merchant, this icon allows users to access help documentation for the application.

On the left side of the page, the Browse Bin displays the top-level sections of the site, and the Group Bin allows users to navigate to other groups and specialty sites. In the middle of the page, the section template shows the section name, "Hot Deals", followed by products, their images, and prices. Each product displays an Add to Cart button along with it. The names of the products are hyperlinks, which, if clicked, show additional details about the products. Along the right side of the page, the seeded Welcome Bin displays. Below the Welcome Bin displays the Global Bin, showing its Currency Picker. See the "Welcome Bin" and "Global Bin" sections in this chapter for more information on these bins.

The iStore user can add items to the shopping cart by selecting the Add to Card button, or create shopping lists, and add items to the shopping list using Add to Card drop-down menu. Click on the Items Details icon to view the product details. See section Implementing Section Attributes and Product Extended Attributes, page 7-39, and Shopping List Management, page 13-20 for more information

Site Home Page Example

Vision Enterprises
Medium Business

Cart Orders Profile Login Register Help

Home Products Support

Categories: All Products Go [Advanced Search](#)

Browse

[Home](#)
[Products](#)
[Books](#)
[Music](#)
[Electronics](#)
[Computers](#)
[Support](#)
[Platinum Support](#)
[Gold Support](#)
[Silver Support](#)
[Bronze Support](#)

Hot Deals

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

Retail Price: \$249.99 Each
Your Price: \$237.49 Each
[Add to Cart](#)

Hewlett-Packard Pavilion Desktop
Work and play anytime, anywhere, with this Pavilion. Features a Mobile Intel Pentium 4 processor - M, 30.0GB hard drive, DVD-ROM/CD-RW combo drive and 15 inches XGA TFT display.

Retail Price: \$1,703.99 Each
Your Price: \$1,519.05 Each
[Add to Cart](#)

Announcements

[What's New on Vision Store](#)
[Offer your customers online, onsite and on-](#)

Welcome

Guest
[Login](#)

[Register](#)

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

[View Saved/Shared Carts](#)

[View Quotes](#)

[Setup Express](#)
[Checkout Preferences](#)

[Connect to Vision](#)

Initial Landing Page Icons and Other Elements

This section discusses the landing page icons and other elements.

Bins on Site Home Page

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

- Account Switcher Bin
- Browse Bin
- Global Bin
- Welcome Bin

These bins are discussed in the following sections.

Implementers also may wish to map group bins to specific sections using Configurable Layout for bins. See the section, "Group Bins", within the chapter, Implementing the Catalog, page 9-1, for more information. You can find more information about configuring bins in the section, "Configuring Bin Placement and Content", in the chapter, Implementing the Catalog, page 9-1.

Account Switcher Bin

The Account Switcher Bin displays by default on the right-hand side of the Site Home

Page. It also can be mapped to any of the post-sales pages (Orders, Pending Orders, Invoices, Payments, Returns, My Products); each of these pages has seven placeholders which can be mapped independently from page to page. If a customer has only one account, the account switcher will not display.

The Account Switcher Bin template (STORE_CTLG_ACCOUNT_SWITCHER_BIN) by default is mapped to the JSP, `ibeCAcdAcctSwitcher.jsp`.

Browse Bin

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

To enable the Browse Bin, set the profile option, IBE: Use Section Bin, to Yes at the iStore application level. See the appendix, Profile Options, page A-1, for more details on the profile option settings. **Note:** This profile works only if you use Fixed Layout when creating a section. If sections are associated to Configurable Layout, then you should map the bin using Configurable Layout for bins (see the section, "Using Configurable Bin Layout", in the chapter, Implementing the Catalog, page 9-1, for more information).

The Browse Bin template (STORE_CTLG_SCT_BROWSE) by default has the JSP, `ibeCCtdSctBrwsBin.jsp`, mapped to it. The following figure shows how the Browse Bin might look in an implementation of Oracle iStore. In the example graphic, the bin displays its seeded title, Browse, along with the following hyperlinks: Home, Desktops, Notebooks, Printers, Peripherals, and Accessories.

Browse Bin Example



Global Bin

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

Important: In order for prices to display in additional currencies, the items must be set up on a price list in those currencies. See the chapter, *Implementing Pricing*, page 11-1, for details.

To enable the Global Bin, set the profile option, IBE: Use Global Bin, to Yes. See the appendix, *Profile Options*, page A-1, for more details on the profile options settings. Just as with the Browse Bin, this profile works only if you use Fixed Layout when creating a section. If sections are associated to Configurable Layout, then you should map the bin using Configurable Layout for bins.

By default, the Global Bin template (STORE_GLOBAL_STORE_BIN) is mapped to the JSP, `ibeCAcdGlobal.jsp`.

Guidelines:

- In order to view the bin, the user's active responsibility must not be iStore Sales Representative (IBE_SALESREP).
- In order to display, the site where the bin will display must have multiple currencies enabled.
- In order for the Global Bin to display on the **shopping cart** page, the current site must have multiple currencies enabled.
- When the Global Bin is mapped to the shopping cart page, changing currency in the shopping cart page causes cart items to be re-priced in the newly selected currency.
- The Global Bin can be mapped to any Oracle iStore page. However, if you map it to any page except a section page, when the user switches currencies in the bin, the page flow will take the user to the Site Home Page after the user submits the change.

Welcome Bin

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

To enable the Welcome Bin, ensure that the profile option, IBE: Use Welcome Bin, is set to Yes (Yes is its default value). See the appendix, *Profile Options*, page A-1, for more details on the profile options settings.

By default, the Welcome Bin template (STORE_CUST_ACC_WELCOME) is mapped to the JSP, `ibeCAcdWelcome.jsp`.

The Welcome Bin displays:

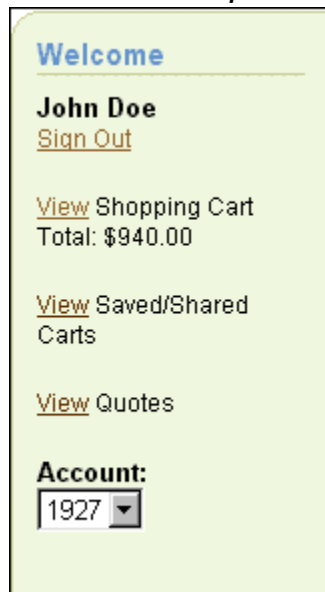
- **Username:** Username of the logged in user, or Guest if the user is not logged in.
- **Login/Logout:** The Login link displays in the bin if the user is not logged in. The Logout link displays if the user is logged in.

- **View Shopping Cart:** This link provides access to the user's active cart, the Shopping Cart page.
- **View Saved/Shared Carts:** This link provides access to saved or shared carts on the Carts page.
- **View Quotes:** This link provides access to the Quotes page, and only displays if your implementation is integrated with Oracle Quoting. See the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information.
- **Shopping Lists:** This link provides access to all the shopping lists on the Shopping Lists page, and only displays if profile option, IBE: Use Shopping Lists, is enabled.
- **Express Checkout:** This link displays if you have enabled Express Checkout. It takes users to the Profile, Preferences page, where they can set up their Express Checkout preferences. See the chapter, Implementing Carts and Orders, page 13-1, for more information on Express Checkout.
- **Account number:** The current account number for the user displays. If the user has more than one account, an account switcher LOV will display. The account switcher displays account numbers only, not descriptions of the accounts. Note that account numbers will not display for guest users.

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

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

Welcome Bin Example



Group Picker

The group picker LOV allows users to filter the groups that display in the Site Selection Page. For an example of how this LOV appears, see the figure, "Site Selection Page in Multiple Columns Example", within this chapter.

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

Language Images

To present the language images in the Customer UI, Oracle iStore ships with more than 20 logical media objects and physical language images. Using the application's standard media objects functionality, at runtime the programmatic access name of a specific language is constructed dynamically. The language images are not mapped to the media objects by default. You must set up your own mappings between the media objects and the images. It is recommended that the mapping for the language images be set to ALL sites/ALL languages.

For a list of the image files, see the section, "Language Images Seeded Values", in the appendix, Seeded Display Data, page C-1.

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

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

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

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

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

Language Links

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

The following figure shows how the language links might appear on the Site Selection Page. In the example, there is an image of an American flag and the word, "USA"; underneath the flag and word are two language hyperlinks, reading "English" and "French".

Language Links Example



Language List

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

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

Supported languages are those that have been fully implemented in your instance and enabled in Site Administration UI during setup.

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

Each language that displays in the Language List is an image mapped to a media object.

The images for the Language List are shipped with the application, but are not by default mapped to their media objects. For the applicable languages, map the images (or use your own custom images) to their media objects.

The following figure shows how the Language List with mapped language images might appear. In the sample image, the names of several languages are shown with small graphic bullets separating them. The selected language is highlighted, while the other languages appear subdued.

Language List Example



Logo Image

The logo that displays at the top left of the Site Selection Page is a seeded media object which can be mapped to a specific image. The logical media name is: STORE_LOGO_MAIN. Out-of-the-box, this media object's source file, ibeibeTabLogo.gif, is mapped to all sites and all languages.

To provide site logos for specific specialty sites and languages, map this logical media name at the site/language level to the image you wish to display. The logo images will then display on the Site Home Page for the sites/languages you have mapped.

See also: "Foundation Profile Options for HTML UI Setup" section in the appendix, Profile Options, page A-1.

Navigation Icons

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

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

- Cart icon
- Login/Logout icons
- Orders icon
- Register icon
- Sites icon

Note: By default, to improve performance, Oracle iStore uses hard-coded images to display icons and menus. You can enable the use of the icon/menu media objects by setting the profile option, IBE: Use Logical Media for Images, to Yes.

Cart Icon

The Cart icon allows users to access cart-related functionality, such as saved carts, shared carts, and quotes. Enabled by default, this icon's appearance can be controlled by the profile option, IBE: Enable Shopping Cart Global Icon.

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

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

Login/Logout Icons

These icons show Login or Logout, depending upon whether the user is logged in or not. Following are the JSP, media object, message, and default content associations:

Login Icon

- **JSP:** ibeCAcpSSOLogin.jsp
- **Media Object:** STORE_SIGN_IN_IMAGE (for non-selected image); no selected image
- **Message:** IBE_PRMT_SIGN_IN_G; default message displays, "Login"

Logout Icon

- **JSP:** ibeCAcpSSOLogout.jsp (not a template, but this JSP will redirect the flow to template STORE_CUST_ACC_LOGOUT if Single Sign-On is not used)
- **Media Object:** STORE_SIGN_OUT_IMAGE (for non-selected image); no selected image
- **Message:** IBE_PRMT_SIGN_OUT_G; default message displays, "Logout"

Orders Icon

The Orders icon allows users access to all order-related functionality, such as Order Tracker, pending Express Checkout orders, and returns, if these have been enabled by the administrator. Enabled by default, this icon's appearance is controlled by the profile option, IBE: Enable Order Tracker Global Icon.

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

this icon:

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

Register Icon

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

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

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

Additional Information: The Registration page JSP, ibeCRgdRegContainer.jsp, is called by the registration entry JSP, ibeCAcpSSOReg.jsp. This entry JSP is used regardless of integration with Oracle Single Sign-On (SSO) Server.

Sites Icon

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

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

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

- **JSP:** ibeCZzdMinisites.jsp (not a template, but this JSP will redirect to template, STORE_CTLG_MSITE_DISPLAY)
- **Media Object:** STORE_SEL_STORE_IMAGE (for selected state, mapped All-All out-of-box to ibeTabLinkStoresS.gif), STORE_DESEL_STORE_IMAGE (for deselected state, mapped All-All out-of-box to ibeTabLinkStores.gif)

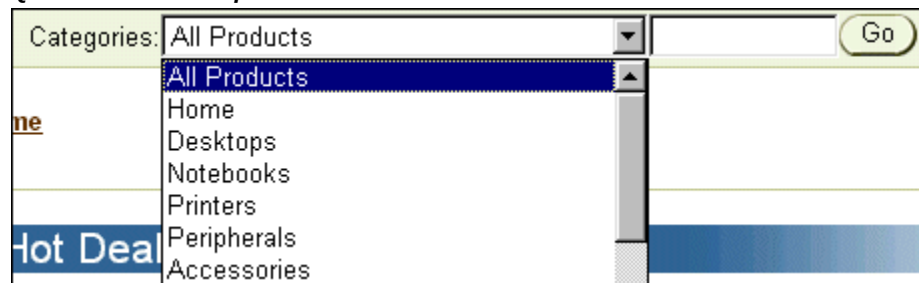
- **Message:** IBE_PRMT_SITES_G; default message displays, "Sites"

Quick Search

Enabled by default, the Quick Search utility allows users to search the catalog for products. The Quick Search displays at the top of the Customer UI Site Home Page. The existence of the Quick Search utility is controlled by the profile option, IBE: Enable Quick Search. Before setting the profile option, first you must set up product search; see the section, "Setting up Product Search for the Customer UI", in the chapter, Implementing Products, page 7-1. If category-level search is implemented, categories show; site sections display if section-level search is implemented.

The following figure shows an example of how the Quick Search might appear in an implementation of Oracle iStore. In the example image, the Quick Search drop-list shows all product categories within the default product category set. In the sample, categories shown are: All Products, Home, Desktops, Notebooks, Printers, Peripherals, and Accessories.

Quick Search Example



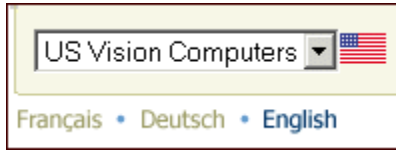
Specialty Site Picker

The Specialty Site Picker is a drop-list of specialty sites which by default displays below the menu tabs on the Site Home Page. It displays all specialty sites within the current group. The Specialty Site Picker is disabled by default. To enable the Specialty Site Picker on the Site Home Page, set the profile option, IBE: Use Specialty Site Picker, to Yes.

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

The following figure shows how the Specialty Site Picker might look in an implementation of Oracle iStore. In the example image, the Specialty Site Picker shows a list of values option with language images underneath the list of values.

Specialty Site Picker Example



Implementing Products

This chapter covers the following topics:

- Overview of Implementing Products Chapter
- Products in Oracle iStore Overview
- Other Oracle iStore Integrations for Product Deployment
- Guidelines and Considerations for Oracle iStore Product Setup
- Providing Regular Available to Promise (ATP)
- Setting Display Options for Units of Measure
- Translating Product Descriptions
- Using Product Autoplace
- Support for Service Items
- Setting up Product Search for the Customer Application
- Product Comparison Overview
- Implementing Section Attributes and Product Extended Attributes
- Using Product Comparison

Overview of Implementing Products Chapter

This chapter describes how to implement products in Oracle iStore.

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

Information on working with the product catalog can be found in the chapter, *Implementing the Catalog*, page 9-1.

Products in Oracle iStore Overview

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

Products are limited to a single organization and a single default Inventory category set defined in two profile options.

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

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

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

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

Optional integration with other Oracle applications can provide additional product functionality. See the section, "Other Oracle iStore Integrations for Product Deployment", below, for more information.

Refer to the *Oracle Inventory User's Guide* to plan and set up your overall product structure and individual products in Oracle Inventory.

Other Oracle iStore Integrations for Product Deployment

You can also integrate Oracle iStore with:

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

- Assigning products to organizations
- Assigning products to Inventory categories

After you integrate Oracle iStore with Oracle Marketing, this additional functionality is available in the Site Administration Application. Oracle iStore-Oracle Marketing integration is described in the chapter, *Integrating Oracle iStore with Oracle Marketing*, page 26-1.

- **Oracle Bills of Material** to set up configurable items, model bundles, and items with standard warranties for sale in your sites. See the chapter, *Integrating Oracle iStore with Oracle Bills of Material*, page 22-1, for details.
- **Oracle Configurator** to enable, in the Oracle iStore Customer Application, customer-configured products, guided selling, solution-based modeling, and limited shopping cart validations. See the chapter, *Integrating Oracle iStore with Oracle Configurator*, page 23-1, for details.
- **Oracle Inventory and Oracle Service Contracts** to allow serviceable items with attached services (for example, extended warranties) to be sold through the sites. See this chapter's section, "Support for Service Items", for more information.
- **ATP Functionality** to allow customers to check item availability in the Customer Application. 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. For more information, see the following sections within this chapter: "Providing Regular Available to Promise (ATP)" and "Setting up Global Available to Promise (ATP)".

Guidelines and Considerations for Oracle iStore Product Setup

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

Products Retrieved From a Single Inventory Organization

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

Specifying Default Inventory Organization and Operating Unit

Set the IBE: Item Validation Organization profile option to the Inventory Organization from which you wish to retrieve products. In a single-organization implementation, this will be the Master Inventory Organization. If you are implementing a multiple-

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

The MO: Operating Unit profile option can be set at application, responsibility, or user level. The product search in Oracle iStore's Site Administration Application retrieves products based on the setting of this profile option at the lowest level to which it is set, with user level being the lowest. Note that if you are integrating Oracle iStore with Oracle Marketing's product screens, then special instructions are available in the chapter, Integrating Oracle iStore with Oracle Marketing, page 26-1.

In addition, within the default Inventory Organization in your implementation, the Oracle iStore product repository is further restricted to a single Oracle Inventory category set, as discussed in the following section, "Inventory Categories and the iStore Product Catalog".

Inventory Categories and the iStore Product Catalog

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

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

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

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

To define default, category-level display rules for your sites, you can link each category (within the default category set) to an Oracle iStore Display Style -- either a seeded, default Display Style, or a new Display Style that you map to the category in the Advanced, Display Styles pages.

Setting the Category Set Profile Option

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

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

Required Inventory Flags for Oracle iStore Products

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

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

Additional Guidelines:

- Oracle Inventory allows users to set a Web Status of Disabled. Products in status Disabled cannot be queried in the Site Administration Application nor assigned to sections. Setting a product's Web Status to Disabled in Inventory will make products disappear in both the Site Administration and Customer applications.
- In the item detail pages of the Customer Application, all child items present in an Oracle Bills of Material (BOM) model bundle will display, regardless of their Web Publish status.
- **Orderable on the Web flag:** Available in the Master Item form's Web Option tab, this flag enables the Checkout button in the Customer Application. You cannot set this flag in the Site Administration Application. If this flag is not enabled, a product will display in the Customer Application, but a customer will be unable to check out with it. Note that this flag is not considered for children of a configured item.
Note: If the item is already part of an outstanding transaction (e.g., item is in the cart), but the Web Orderable flag for the item is No, the user should not be allowed to checkout with the cart. The user should remove that item and then proceed to checkout.
- **Customer Orders Enabled:** Available in the Master Item form's Order Management tab, this flag marks a product as orderable by customers. You cannot set this flag in the Site Administration Application. If this flag is not enabled, no one will be able to order the product.
- **OE Transactable:** The OE Transactable flag needs to be marked Yes in the Order

Management attributes group, if Order Management and Shipping Execution are implemented. This attribute indicates whether demand can be placed for an item by Oracle Order Management, and whether shipment transactions are communicated to Oracle Inventory. It is mandatory if you want to track the shipment transactions in Inventory. For items you do not ship, you may still want OE Transactable turned on if you use the items in forecasting or planning. A warning is issued if you change the value of this attribute when open sales order lines exist. You cannot turn this attribute off if demand exists.

Categories Lists and Site Administration UI Behavior

In lists of categories in the Site Administration UI, Oracle iStore shows only leaf categories containing products. Leaf sections are described in this chapter's section, "Categories Map to Leaf Sections".

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

- For leaf categories to show up in category LOVs, they must be associated with products. Implementers must ensure that categories they expect to utilize in the Site Administration Application contain products.
- The UI effect occurs in the following menus:
 - Catalog tab, Sections subtab, Categories link
 - Catalog tab, Relationships subtab
 - Advanced tab, Categories subtab
- Stale data can occur for associated categories whose products are removed. For example, if Category 1 containing products is associated to Section 1 in the Sections, Categories menu, and then all of the products are removed from Category 1, the category-section association still exists -- but the category will no longer be viewable in the Categories LOV.

How Oracle iStore Product Fields Map to Oracle Inventory Fields

In the Oracle iStore Site Administration Application, product fields do not map identically to the Oracle Inventory fields from which they are derived. The following table shows the field mappings.

Oracle iStore-Oracle Inventory Item Field Mapping

iStore Product Field	Inventory Field
Product Name	Relates to Description field in Oracle Inventory forms and to the Description field in the Oracle Inventory MTL_SYSTEM_ITEMS_TL table.
Product Number Note that this field is Part Number in the Customer Application Order Tracker and shopping cart pages.	Relates to Item field in Oracle Inventory forms. Each product number shown is a combination of key flexfield segments in the Oracle Inventory MTL_SYSTEM_ITEMS_B table.
Description	Relates to the Long Description field in Oracle Inventory forms and to the Long_Description field in the Oracle Inventory MTL_SYSTEM_ITEMS_TL table.

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

Providing Regular Available to Promise (ATP)

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

In the Customer Application, this manifests as the Check Availability action in the Shopping Cart page.

For information on enabling global ATP for Oracle iStore, see the chapter, Integrating Oracle iStore with Oracle Advanced Supply Chain Planning, page 21-1.

High-Level Steps to Set up Regular ATP

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

1. Set up ATP in Oracle Manufacturing.
2. Define ATP sourcing rules in Oracle Inventory.

3. Enable products for ATP by setting their ATP and ATP component flags.
4. In the Site Administration Application Create/Update Site page, activate the Allow customers to check item availability checkbox.

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

Setting Display Options for Units of Measure

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

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

- **Yes:** For each product, all UOMs and all prices will be displayed.
 - Caution:** Performance issues (slow loading of pages) can occur if the profile is Yes. The performance issues can happen because, when the profile is Yes, a pricing call is made for each UOM of each item in the price list.
- **No:** For each product, only the primary UOM and prices are displayed. In this case, the primary UOM must be defined in a valid price list accessible by the user.

The default value is No.

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

See also: "Direct Item Entry" in the chapter, Implementing Carts and Orders, page 13-1.

Translating Product Descriptions

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

For example, you can enter German product descriptions when the Site Administration Application is displaying in German, and French product descriptions when the Site Administration Application is displaying in French. When customers enter your sites,

they see the product descriptions in the language that they selected.

You can use the following procedure.

Prerequisites

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

See the chapter, *Implementing Globalization and Multi-Org Architecture*, page 17-1, for information on fulfilling these prerequisites.

Steps

1. Launch the Site Administration Application and select the Preferences icon. The Oracle CRM Technology Foundation user profile page opens.
2. Change your language display preference to the language into which you want to translate product descriptions.
3. In the Catalog, Products tab, enter product descriptions. The translations you enter here are associated with the language of the Site Administration Application display.
4. Sign out of the application.
5. The translated product descriptions should now display in sites that carry the products and support the specified language.

Using Product Autoplacement

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

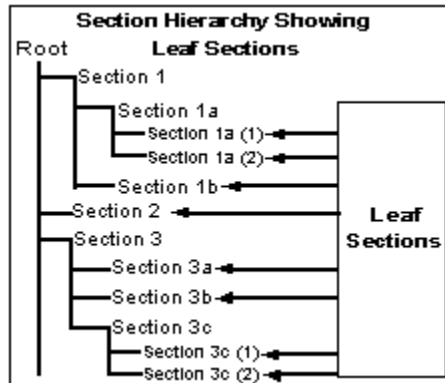
Autoplacement Available for Leaf Sections Only

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

Note: If you attempt to use the Product Autoplacement feature with sections that are not Leaf sections, the autoplacement will not be effective.

The following diagram illustrates the Leaf section concept.

Section Hierarchy Showing Leaf Sections



Categories Map to Leaf Sections

The autoplacement process matches Oracle iStore Leaf sections to Oracle Inventory categories within the default category set specified in the profile option, IBE: Category Set. You must map the Leaf sections to categories, as described below. A warning message will display if you attempt to assign a non-Leaf section to a category.

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

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

To map Leaf sections to categories, log in to the Site Administration Application and select Catalog, Sections (select section), Update, Categories hyperlink, Assign Categories.

Running Product Autoplacement Concurrent Program

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

Autoplacement Program Parameters

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

- **Run Immediately or Schedule:** The concurrent program can be run immediately after you enter the parameters or scheduled to run at a later time.
- **Append (add) or Replace actions:** You can specify if the Product Autoplacement program only adds products to sections, or also removes products that no longer meet the criteria for inclusion in the sections.
 - Append action --- When you use this option, products are always added to sections, but the program never removes products from sections that no longer match the current category-section mapping assignments.
 - Replace action --- When you use this option, products are always added to sections, and replaced with "fresh" products if necessary. The products which no longer meet the criteria for inclusion in the Leaf section are removed.
- **Target section:** Use this field to specify the start section for the concurrent program. The target section can be a Leaf section or non-Leaf section. This parameter is combined with the next parameter on the screen, *Include the subsections of the target section*; possible values: Yes/No. The tandem activity of these two fields is as follows:
 - If the target section is a Leaf section and the *Include the subsections of the target section* field is set to Yes, the concurrent program will only perform autoplacement for the target section. This is because if the target section is a Leaf section, it will have no subsections.
 - If the target section is a Leaf section and the *Include the subsections of the target section* field is set to No, the concurrent program will only do autoplacement for the target section.
 - If the target section is a non-Leaf section and the *Include the subsections of the target section* field is set to Yes, the concurrent program will find the Leaf subsections under the target section and perform the autoplacement on all of these Leaf sections.
 - If the target section is a non-Leaf section and the *Include the subsections of the target section* field is set to No, the concurrent program will not do the autoplacement. This is because you cannot auto-populate a non-Leaf section.
- **Evaluation or Execution modes:** The program can be executed in one of two modes:
 - Evaluation -- When you run the program in this mode, only the concurrent program output is populated with the information about assignment, reassignment, replacement, or removal. Since the autoplacement does not actually take place, this allows you the opportunity to view the results of the program before committing the products to the autoplacement program.

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

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

Product Autoplacement Examples

This section contains Product Autoplacement feature examples.

Example

Example 1

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

- Product 1
- Product 2

Category 1 in Inventory has been assigned the following products:

- Product 1
- Product 3
- Product 4

Category 2 in Inventory has been assigned the following products:

- Product 2

In the Site Administration UI **Update Section: Categories** page, you assign:

- Category 1 ----> Section 1

In Oracle Forms, you start the iStore Product Autoplacement Concurrent Program, using the following parameters:

- Autoplacement Mode = EXECUTION
- Product Assignment Mode = APPEND
- Target Section = Section_1
- Include subsections of the target section = No
- Product Name = Product % (% is a wildcard)
- Product Number = %
- Product Publish Flag = ALL
- Product Start Creation Date = undefined
- Product End Creation Date = undefined

You execute the concurrent program. When the program is finished, Section 1 will contain the following products:

- Product 1
- Product 2
- Product 3
- Product 4

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

Example **Example 2**

Using the product placement definitions in Example 1, you execute the concurrent program in the following mode:

- Autoplace Mode = EXECUTION
- Product Assignment Mode = REPLACE
- Target Section = Section_1
- Include subsections of the target section = No
- Product Name = Product % (% is a wildcard)
- Product Number = %
- Product Publish Flag = ALL
- Product Start Creation Date = undefined
- Product End Creation Date = undefined

You execute the concurrent program. When the program is finished, **Section 1** will contain the following products:

- Product 1
- Product 3
- Product 2 is removed from Section 1, as Product 2 is not in Category 1 that is linked to Section 1. Product 3 and Product 4 are added to Section 1.

Product Autoplace Concurrent Program Log

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

- **Date:** Date the program was executed
- **Mode:** Whether the program was run in evaluation or execution mode
- **Preferences:** Either Add and remove product associations or Add product associations only, depending upon the parameters selected
- **Starting Section:** Starting section name
- **Select Subsections:** Either Yes or No, depending upon the parameters selected
- **Product Selection:** From <date> to <date>

- **Product Name:** Product filter entry, if any; for example Toy%
- **Web Publish Status:** Published or Unpublished
- **Details table:** A table showing the product numbers and product names, whether the products were added or removed, and the section names and section codes of the sections where the products were added or removed

Support for Service Items

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

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

Service Items Support Key Terms and Definitions

Key terms related to service items support are defined below:

- **Serviceable Item:** Serviceable items represent saleable products, spare parts, subassemblies, and components. In Oracle Inventory's Master Item form, the Serviceable Product attribute in the service attribute group is used to flag items as serviceable.
- **Service Item or Service:** This term refers to a service (for example, an extended warranty) which relates to a serviceable item. Services are items defined in the item master that determine the coverage terms given or sold to a customer. For a service item, the Unit of Measure must be time-based, since a service is to cover a set period of time. Service products can be defined in two categories: warranties and extended warranties. Throughout this document, we will use service or service item to represent extended warranties only. The terms service and service item are equivalent.
- **Warranties:** These are services automatically included with the purchase of a product. Since these services are associated with serviceable items in Oracle Bills of Materials (BOM), they generally are given to the customer free of charge, because the price is assumed to be included in the price of the associated product.
- **Extended Warranties:** These are services that may be purchased in addition to a product, and are not included in BOM for the serviceable item. Extended warranties

have unit-based or percentage-based pricing.

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

Service Items Catalog and Shopping Cart Display

In the Site Administration Application, site administrators assign serviceable items to site sections. In the Customer Application, customers view serviceable items in the catalog; they also view the services available for serviceable items in the product detail page. The product detail page lists the services available, with selectable radio buttons for the service options. Oracle iStore seeds a Display Template for this purpose, the Product Detail with Services template.

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

Additional Points:

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

Shopping Cart Display

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

- A service that has been added to a shopping cart appears as a separate line item in the cart -- it displays in the line *beneath* its related serviceable item, indented slightly from the left side of the cart table.
- An icon appears next to services in the cart. When users hover the mouse over the icon, the mouse-over text will display which serviceable product the service is associated to.
- By selecting the *Add Service* hyperlink under a serviceable product, customers can drill down into the serviceable item details, replacing the service being purchased, if desired, or adding an additional service.
- Note that while generating the *Add Service* hyperlink, Oracle iStore does not check if any services are defined for the serviceable item.
- The quantity of a service item in the cart will display in the cart, but cannot be updated -- it is read-only and will always reflect the quantity of the associated serviceable product.

- Users can delete a service by itself; a Delete icon appears next to services in the cart.
- If a customer deletes a serviceable item that has a related service in the cart, the system deletes the service as well.
- Serviceable items are not merged, regardless of the setting of the merge items profile, IBE: Merge Shopping Cart Lines.
- Services cannot be added to a shopping list. If a cart has a serviceable product and related service in it and the customer presses Add to List, then only the serviceable product will be added to the shopping list. The customer will need to manually add the service to the cart when he moves the serviceable items to a cart.

The following figure shows a sample portion of an active shopping cart with two serviceable items and the *Add Service* hyperlink underneath each one. In this example, the serviceable products shown are the Vision Pad DX - Mobile Computer and the Vision Sentry PDA plus CellPhone.

Shopping Cart Display of Serviceable Item

Item Name	UOM	Quantity	Price
Vision Pad DX - Mobile Computer + Add Service	Each	<input type="text" value="1"/>	\$249.99
Vision Sentry PDA plus CellPhone + Add Service	Each	<input type="text" value="1"/>	\$150.00

Add Service Page

When customers select the *Add Service* hyperlink from the shopping cart to add or change a service, the Add Service page for the item appears. The add service display is accomplished through the use of the Product Detail with Services Display Template. See the chapter, Implementing the Catalog, page 9-1, for more information about this template.

- **Add Service Template ---**

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

The following figure shows an example of the Add Service page for an item. In the example, three selectable radio buttons are shown with the following values: (1) Extended Notebook PC Service Program (Gold), (2) Bronze Coverage Extended Notebook PC Service Program (Gold), and (3) None.

Add Service Page Example

<input checked="" type="radio"/>	Extended Notebook PC Service Program (Gold)	\$420.00	\$420.00
<input type="radio"/>	Bronze Coverage	\$0.00	\$0.00
<input type="radio"/>	Extended Notebook PC Service Program (Gold)		
<input type="radio"/>	None		

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

Service Detail Display

By selecting the hyperlinks of the services, customers can further drill down into the details of a particular service associated to the product. The text for this page is derived from the setup of the item description in Oracle Inventory.

Multiple Services for a Single Item

From the Add Service page, customers can select multiple services for an item, if the profile option, IBE: Enable Multiple Services, is set to Yes. Note that customers cannot select multiple services at the same time, but rather must add a service, then re-navigate to the Add Service page and select an additional service. If the profile is set to No, then Oracle iStore will replace an existing service with any additional service added. See this chapter's section, "IBE: Enable Multiple Services", for additional guidelines on setting the profile.

Adding Multiple Services Process Flow

Following is the process flow for adding multiple services:

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

Configured Items

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

Note: This functionality requires integration with Oracle Configurator and Oracle Bills of Material. See the chapters, *Integrating Oracle iStore with Oracle Configurator*, page 23-1, and *Integrating Oracle iStore with Oracle Bills of Material*, page 22-1, for more information about these products.

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

- **Reconfigure:** This link always displays for any configurable item, whether serviceable or non-serviceable. Users can launch Oracle Configurator to reconfigure the item if desired.
- **Add Service:** This link displays if the top model item is configured as serviceable. Selecting this link leads to a page showing all components of the configured item, as well as an Add Service link for all serviceable items or components. Customers can view the service items beneath the corresponding serviceable component. Service items are indented to the right with an icon after the service item name.
- **Details:** Only the Details link will appear if the configurable item is non-serviceable; users can select this link to view configuration details.

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

- **Sample Item 1:** Sentinel Custom Desktop is a non-serviceable configurable item -- therefore, it displays only the Details and Reconfigure links. The Details link shows the configurable item and its current configuration. The Reconfigure link allows users to reconfigure the item in the Oracle Configurator Application.
- **Sample Item 2:** Another configurable version of the Sentinel Custom Desktop is a serviceable item -- therefore, it also displays the Add Service link, in addition to the Reconfigure link.
- **Sample Item 3:** Vision Pad DX Mobile Computer is a non-configurable, serviceable item -- therefore, it displays only the Add Service link.
- **Sample Item 4:** Envoy Deluxe Laptop is a non-configurable bundle item that is serviceable -- therefore, it displays the Details link and Add Service link.

The following figure shows an example of how configurable serviceable items display in the shopping cart. In the sample image, the item is the Sentinel Custom Desktop. Under the item name are the links, Reconfigure and Details/Add Service.

Shopping Cart Display of Configurable Serviceable Items Example

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

When customers select the Add Service link for a configurable item, the Add Service page displays the configurable item and all components, with Add Service links for any serviceable components. The following figure shows an example of the Add Service page for a configurable item with serviceable components.

In sample image, the serviceable product is the Sentinel Custom Desktop. It displays as the parent item. Its name is a hyperlink that allows the customer to drill down into the item description. Beneath the parent item, all components of the configured item display. Each component item that is serviceable has an Add Service link next to it. Customers can use the Add Service link to add additional services or replace existing services for each component. Columns in the table include: Delete (with an icon if the component can be deleted from this page); Part Number; Item, showing item name; UOM, showing unit of measure; Quantity, showing amount ordered; Unit Price, showing the price of each component; and Total Price, which is the quantity times the unit price. A button labeled "Done" allows users to save their work and return to the standard shopping cart view.

Add Service Page for Configurable Item

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

When customers select the Add Service link for one of the components of the configurable item, the Add Service page displays all services available for the component. For an example of this page, see the figure, "Add Service Page Example".

Add Service Template for Configurable Items

For configurable products, the Add Service page is derived from the logical template, STORE_CART_SVA_CFG_ITEM, and not the logical template discussed in the section, "Add Service Page".

Product Search

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

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

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

For more information about the product search in Oracle iStore, see the section, "Setting up Product Search for the Customer Application".

Express Checkout

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

For more about Oracle iStore's Express Checkout feature, see the chapter, *Implementing Carts and Orders*, page 13-1.

Item-Level Shipping

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

For more information about the item-level shipping in Oracle iStore, see the chapter, *Implementing Payment Types and Shipping Methods*, page 12-1.

Implementing Service Items Support

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

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

Step 1 - Set up Serviceable Items and Services

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

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

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

Step 2 - Set up Pricing for Service Items

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

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

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

The following sections contains steps for these two procedures.

Defining a Standalone Price for a Service Item

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

Steps

1. Log into Oracle (Forms) Applications as a user with access to the Pricing menus.
2. Navigate to the Price List Setup window.
3. Search for the price list in which you want to define the price of the service item.
4. Search for the service item by its part number under List Lines, Product Value.
5. Enter the price (without the currency sign) in the List Lines, Value field.

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

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

Steps

1. Log into Oracle (Forms) Applications as a user with access to the Pricing menus.
2. Navigate to the Price List Setup window.
3. Search for the service item by its part number under List Lines, Product Value.
4. Under List Lines > Application Method, select Percent.
5. Enter the percentage (without the percent symbol) in the List Lines, Value field.
6. Next, associate the service items with a specific serviceable product in Inventory, so that it knows which parent product the percentage is based on. In other words, an Inventory relationship between them must be defined.
7. **Prerequisites:** Serviceable product must be created using Oracle Inventory. Service item must be created using Oracle Inventory.
8. From the Responsibilities menu select, Inventory, Items, Item Relationships.
9. Search for the serviceable product by the part number in the From field.
10. Search for the service item by the part number in the To field.
11. In the Type field, select Service from the drop down list.
12. Save the changes.

Step 3 - Set up Oracle Service Contracts

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

- Coverage Templates
- Exclusion Rules

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

Set up Coverage Templates

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

Set up Exclusion Rules

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

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

Guidelines:

- The Generally Available flag determines whether the entries in Product and Party tabs are inclusions or exclusions. By selecting the Generally Available checkbox for a service, all products and parties listed will be excluded from receiving that service. By leaving the Generally Available checkbox unselected, the products and parties listed will be the only ones eligible to receive that service.
- Exclusion rules can be established at the B2B party level or at the B2C user level. If a service is excluded using a B2B organization party number, no members of the B2B organization will have access to the service. To exclude/include a service, select: (1) B2B party number, in the case of B2B exclusions; or (2) B2C person name, in the case of B2C exclusions.

Examples:

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

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

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

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

1. Check the Generally Available box under the Product tab and enter the part number of Serviceable Product A in the Exception list.
2. Check the Generally Available box under the Party tab and select the party number (organization party_id) of the party from the Customer Accounts list.

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

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

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

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

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

Steps

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

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

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

Step 4 - Set Profile Options

Set the following profile options:

- **IBE: Use Item Level Service:** Set to Yes. See the "Profile Options" appendix for more information.
- **OM: Cascade Service:** Must be set to No. If set to Yes, and a customer adds a service to a model item, when the order is processed in Oracle Order Management,

the added service will be added to every component in the model. Refer to the *Oracle Order Management Implementation Manual* for details.

- **IBE: Enable Multiple Services:** Set to Yes or No according to business requirements. See the appendix, Profile Options, page A-1, for more information.
- **IBE: Use Customer Service Exclusion:** Set to Yes if using party exclusion rules in Contracts; otherwise, set to No. Set at application level. See the appendix, Profile Options, page A-1, for more information.

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

In Oracle iStore, add the serviceable items to your site section(s). Follow the steps in the section, "Creating and Maintaining Sections", in the chapter, Implementing the Catalog, page 9-1.

Note: There is no need to associate the service items with site section(s), as they will be picked up automatically through their association with the serviceable item. However, for search to work for these items, you must associate the service items with sections.

Step 6 - Associate Serviceable Items to Display Template

In Oracle iStore, associate serviceable items to the product Display Template, Product Detail with Services. See the chapter, Implementing the Catalog, page 9-1, for details about this template.

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

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

Customizing Oracle iStore to Link Services to Oracle Install Base Items

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

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

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

Sample Code for Linking Install Base Item with Services

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

```
// instantiate the cart & set the cartid, if any
ShoppingCart shopCart = new ShoppingCart();
if (cartId != null) shopCart.setCartId(cartId);
// instantiate the placeholder parent item
ShoppingCartItem []shopCartItem = new ShoppingCartItem[1];
ServiceItem []serviceItem = new ServiceItem[1];
shopCartItem[0] = new ShoppingCartItem();
shopCartItem[0].setOperationCode(ShoppingCartItem.NOOP_OPCODE);
//instantiate the service item
serviceItem[0] = new ServiceItem();
serviceItem[0].setInventoryItemId(itemId);
serviceItem[0].setQuantity(quantity);
serviceItem[0].setOrganizationId(organizationId);
serviceItem[0].setUom("YR");
serviceItem[0].setItemtype(ShoppingCartItem.SERVICE_ITEM_TYPE);
serviceItem[0].setServicePeriod("YR");
serviceItem[0].setServiceDuration("1");
// serviceItem[0].setStartDateActive("02-MAY-2003"); defaulted in
pls sql
// The next two lines are the key differences from a normal add
service.
// As the service reference type is "CUSTOMER_PRODUCT", it will
not be validated against another quote line as a normal service
item would. This type value is usually defaulted to "QUOTE" for
the normal case of adding a service line to another shopping cart
line.
serviceItem[0].setServiceReferenceType(ServiceItem.
REFTYPE_CUST_PROD);
// Second, where the user might normally set a quote line id, for
this purpose, they would use the install base line id (gotten
from other logic) to be set as the service ref line id.
serviceItem[0].setServiceReferenceLineId(installbaselineId);
shopCartItem[0].setServiceItems(serviceItem);
shopCart.setShoppingCartItems(shopCartItem);
```

```
shopCart.addItemToCart();
cartId = shopCart.getCartId();
// in case we ended up 'creating' a cart
```

Setting up Product Search for the Customer Application

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

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

Additional Information: For more information on how the Product Search appears in the Customer Application, see the "Quick Search" section in the chapter, Implementing Initial Customer Application Pages, page 6-1.

Customer Application Product Search Process Flow

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

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

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

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

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

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

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

appropriate Inventory table. This keeps product information current in the search table.

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

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

You can also perform the product search using the Enterprise Command Center at the section level. For information on implementing the Enterprise Command Center product search, see "Implementing Enterprise Command Center (ECC) for Product Search", page 8-1.

Product Search Dependencies

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

- **Oracle Inventory:** You must ensure that Oracle Inventory is installed and configured properly before setting up the Customer Application product search. Refer to Oracle Inventory implementation documentation for details on how to set up Oracle Inventory for product searching.
- **Oracle interMedia Text:** You must ensure that Oracle interMedia Text is installed and configured properly before setting up the Customer Application product search. Refer to the Oracle interMedia Text documentation for details on how to set up and configure interMedia Text.
- **Oracle Database:** The product search requires version 8.1.7 of the Oracle database with the Oracle interMedia Text option installed. You can enable either category-level or section-level searches from the Customer Application Site Home Page Quick Search utility.

Special Characters and Reserved Words in the Search

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

Special Characters

Following are the special characters:

- _ (underscore)
- - (hyphen)

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

Reserved Words

Following are the reserved words:

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

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

Following are some examples:

- **If you have special characters:**

Example:

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

CBX/ -AM100

- **If you have special characters with wildcards:**

Example:

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

CBX/-A%

- **If you have reserved words:**

Example:

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

{NT}

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

{AND}

- **For a normal search string:**

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

Example:

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

laptop

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

Setting Up Oracle Inventory for Product Search

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

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

Setting Customer Application Search Profile Options

Oracle iStore search requires that several iStore profile options be set.

For all search profile option descriptions and the recommended values, see the appendix, Profile Options, page A-1

Running the iStore Search Insert Concurrent Program

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

Prerequisites

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

See the appendix, Profile Options, page A-1, for more information on the profile options.

Steps

1. Log in to Oracle Forms with the iStore Concurrent Programs responsibility.
2. Select Single Request and select OK. The Submit Request window opens.
3. From the Name LOV, select iStore Search Insert.
4. Select Submit to start the concurrent request. Note the request ID.

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

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

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

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

Populating the Section-Level Search Table

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

Since the iStore Search Insert program can populate product data based on the category set profile value (IBE: Category Set Filter for Product Search), the section refresh program also populates product data into the IBE_CT_IMEDIA_SEARCH table, when necessary for product search. The profile option, IBE: Use Category Search, is used by iStore to determine whether product searches in the Customer Application are filterable by section or product category. The iStore Section Refresh concurrent program checks the value of IBE: Use Category Search. If it is set to No (meaning iStore is using section search rather than category search), **and** if the IBE: Category Set Filter for Product Search profile option is set to a specific category set, a query will be run to populate the IBE_CT_IMEDIA_SEARCH table with published products that are not in the specific category set but which are linked to iStore sections. This allows section data population in addition to category set data population when a specific category set is being used for data population.

Prerequisites

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

Steps

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

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

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

Changing Between Category-Level Search and Section-Level Search

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

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

If you are setting up category-level search, follow the steps in the section, "Running the iStore Search Insert Concurrent Program".

If you are setting up section-level search, follow the steps in the section, "Populating the Section-Level Search Table".

Enabling Fuzzy Searches

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

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

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

Fuzzy search is currently not supported for Japanese language implementations.

Enabling Synonym Searches

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

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

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

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

Prerequisites

Set the profile option, IBE: Thesaurus File Name, to an existing file that must be present

in the file system.

Steps

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

You can find examples of synonym files in the `$ORACLE_HOME/ctx/thes` directory, where `$ORACLE_HOME` points to the 8.1.7 environment.

- Load the thesaurus using the `ctxload` utility in `$ORACLE_HOME/ctx/bin` as follows:

```
ctxload -user <username/password> -thes -name <thesaurus name> -thescase <y/n> -file <file name>
```

`<username/password>` is your user name and password, e.g., `ctxsys/ctxsys`.

`<thesaurus name>` is the thesaurus name with the syntax `prefix_language_short_code` to indicate the thesaurus language. The prefix is set in the profile option, IBE: Thesaurus File Name. For example, if the profile option is set to `ibethes`, then the thesaurus name is `ibethes_us` for American English, since the language short code is `us`. For French, the thesaurus name is `ibethes_f`, since the language short code is `sf`. You can find the language codes by selecting `LANGUAGE_CODE` from the `FND_LANGUAGES` table.

`<y/n>` indicates whether the thesaurus is case sensitive. Enter `y` if you want the thesaurus to be case sensitive, or `n` if you want it to be case insensitive.

`<file name>` is the physical synonym file's name, e.g., `MyThes.txt`.

The following example is the command you should run as username `ctxsys` with password `ctxsys` when loading an American English thesaurus with the physical file name `MyThes.txt` for a case insensitive synonym search, when the profile option, IBE: Thesaurus File Name is set to `ibethes`.

```
ctxload -user ctxsys/ctxsys -thes -name ibethes_us -thescase n -file MyThes.txt
```

- Set the profile option, IBE: Use Synonym Search to Yes. Note: If you have already loaded a thesaurus for a given language, you can use Oracle interMedia APIs such as `tx_thes.create_relation` and `ctx_thes.delete_relation` to add or remove synonyms in that language for existing searchable items. You can also add or remove phrases by using the APIs `ctx_thes.create_phrase` and `ctx_thes.delete_phrase`. See Oracle8i interMedia Text Reference for more information.

PL/SQL, Java, and JSPs Involved in Search

The following program units are used in the product search process:

- `java/catalog/Search.java` (main Java program that executes the query)
- `ibeCSrdSrchResults.jsp` (search result JSP)

- `ibeCZzdMenu.jsp` (main home page)
- `ibeCSrdSrchAdvForm.jsp` (search result JSP)
- `IBEVCSKS.pls` (package specification)
- `IBEVCSKB.pls` (package body for trigger on search table)
- `IBEVCSUB.pls` (package body)
- `IBEVIDTS.pls` (package specification for the main database trigger)
- `IBEVIDTB.pls` (package body for the main database trigger)
- `java/catalog/PrdRec.java` (definition of search result object)
- `IBEVCSIS.pls` (package specification for section search package)
- `IBEVCSIB.pls` (package body for category and section search package; one time load of product descriptions through concurrent manager)
- `ibecsmcr.sql` (creates materialized view to facilitate availability of product search functionality during iStore Section Search Refresh)

Customizing Search

If you want to add more item attributes to the search parameters, you must modify `IBEVCSIB.pls` for the initial load and the PL/SQL triggers mentioned above to make sure that updates to these attributes get propagated to the search table.

- Modify the search package (`IBEVCSKS.pls` and `IBEVCSKB.pls`) for adding the additional product search attributes. By default, only the part number, product name (description column), and product description (long description column) are included in the search.

If additional attributes are to be added in the product search, the parameters for the package specification and body will have to be changed accordingly, with the new attributes. This package moves the subsequent changes in the product information, to Oracle iStore's search table `IBE_CT_IMEDIA_SEARCH`. Any insert, delete, or update on `MTL_ITEM_CATEGORIES`, any delete or update on `MTL_SYSTEM_ITEMS_B` and any insert, delete, or update on `MTL_SYSTEM_ITEMS_TL` table will move the change to the search table `IBE_CT_IMEDIA_SEARCH` through this procedure. This procedure is called from the main database trigger procedures, as explained in the next step.

- If new parameters are added to the search package, the call to the search package must be modified in the main database trigger package `IBEVIDTB.pls` to include the new parameters added to the search move procedures. This package body calls all of Oracle iStore's ERP-related database trigger procedures, including the search

package procedures.

- The database trigger on the product tables calls the main database trigger package to move the product data change to the Oracle iStore search table IBE_CT_IMEDIA_SEARCH.

However, modifying the search package call will not recreate the interMedia index to include the changed information in the search table IBE_CT_IMEDIA_SEARCH. Administrators must refresh the interMedia search index every time a new product is added or an existing product is changed or deleted. You can refresh the interMedia index IBE_CT_IMEDIA_SEARCH_IM through the Oracle Enterprise Manager utility, or by executing the command "CTX_DDL.SYNC_INDEX" in SQL*Plus as follows:

```
exec ctx_ddl.sync_index(' IBE_CT_IMEDIA_SEARCH_IM' );
```

You must have privileges to alter the interMedia index. After this step, the modified product information is visible in the Oracle iStore product search process.

Adding Stopwords to Searches

There are many search words such as "and," "if," and "then" which are very common and will return numerous search results. Search results may not be relevant to the user's query if such common search keywords are used. In addition, searches on common keywords use processing resources and slow down performance. These common keywords can be excluded from the search by using the "Stop Words" utility in interMedia.

Log in to Oracle Enterprise Manager as CTXSYS to see the stop words in the Stop List. You can add more stop keywords to the Stop List.

Product Comparison Overview

Product Comparison enables you to choose two or more products from the product catalog section for side-by-side comparison.

You can select products for comparison in the product detail, product multi select, and product multi select with section links templates for catalog sections.

You can add item to the shopping cart along with additional items to complete the checkout process.

The Oracle iStore Administrator can also define the product extended attribute groups and product extended attributes that can be compared, using XML files, which are grouped by catalog section within iStore.

Enabling and Disabling Product Comparisons

The Oracle iStore Administrator enables and disables the Product Comparison feature for a catalog section.

The Oracle iStore Administrator selects the Enable Product Comparisons check box while creating, or updating the iStore catalog section to enable product comparison. By default, this check box is unselected, thus product comparison is not enabled. When the Enable Product Comparisons check box is selected, then all iStore users accessing the catalog section can compare products.

The Oracle iStore Administrator can enable the product comparison for a featured leaf catalog section by selecting the Enable Product Comparisons check box.

To enable product comparison:

1. Navigate to Catalog > Sections > Section Detail.
2. In the Update Section: Details page, select the Enable Product Comparisons check box.

The screenshot displays the 'Update Section: Details' page in the Oracle iStore Administrator interface. The page is titled 'Update Section: Details' and includes a navigation menu on the left with 'Section Detail' selected. The main content area contains a form for updating section details. The form includes the following fields and options:

- Section Name:** A required text input field.
- Section Code:** A text input field.
- Short Description:** A text area with a scroll bar.
- Long Description:** A text area with a scroll bar.
- Keywords:** A text input field with a note: 'Use commas to separate keywords.'
- Parent Section:** A dropdown menu with a search icon.
- Featured Section:** An unchecked checkbox with a tip: 'TIP If a section is featured, you may add products but not subsections.'
- Status:** A dropdown menu set to 'Unpublished'.
- Apply status to all subsections:** An unchecked checkbox.
- Start Date:** A date input field set to '30-OCT-2009'.
- End Date:** A date input field.
- Enable Product Comparisons:** An unchecked checkbox.

The page also features a 'Quick Find' search bar at the top and a 'Logged In As' indicator showing 'IBE_ADMIN'. At the bottom of the form, there are buttons for 'Preview', 'Revert', 'Add Products', and 'Apply'.

Note: You can enable the product comparison for a leaf featured catalog section only.

3. Click the Apply button.

To disable product comparison:

1. Navigate to Catalog > Sections > Section Detail.

2. In the Update Section Details page, unselect the Enable Product Comparisons check box.
3. Click the Apply button.

Implementing Section Attributes and Product Extended Attributes

By default the Section Attributes are displayed in the product comparison table. The Oracle iStore Administrator can extend this table, and add additional product sections using product attributes. Additional product information sections are referred to as Extended Attribute Groups, and the data in these sections is referred to as Extended Product Attributes.

The Oracle iStore Administrator defines content components that display the section attributes at the catalog section level and product extended attributes at the product level. These attributes are defined within the Advanced Tab, Content Components sub-tab. Additional product content displayed in the Item Details pop-up window and the Product Comparison page is based on XML standards.

Item Details

The Item Details icon enables the iStore user to view the product details without navigating to the Item Details page. When a user clicks on the Items Details icon then the following attributes for a product are displayed:

- Product Name
- Product Small Image
- Product Description
- Pricing and Units of Measure
- Quantity (defaults to 1)

If the *IBE: Enable Product Details Pop-up Dialog* profile option is set to Yes at the site level, then the Item Details icon is displayed. The Item Details pop-up window displays the default data for a product. The iStore Administrator can display additional content using the product content components defined at the product level and at the section level in a XML file.

Setting Up Catalog Section Level Extended Attribute Groups

The Oracle iStore Administrator decides, at the Catalog Section level, which extended attribute groups can be included on the Item Details pop-up window and the Product Comparison page. The section level extended attributes are defined in an XML file and stored in Oracle Content Manager (OCM).

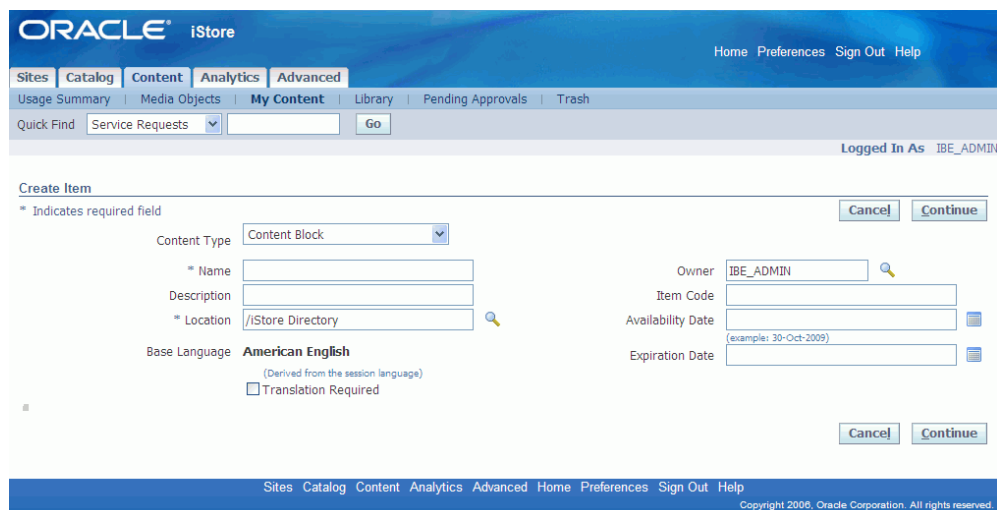
The Section Attributes for a section is stored in Oracle Content Manager (OCM), and for

Product Extended Attributes can be stored either in OCM or located on an external server.

The Oracle iStore Administrator defines the data for Product Extended Attributes at the product section level. The Oracle iStore Administrator defines an XML file that is included from OCM. The Oracle iStore Administrator can enter unlimited groups, which are used for item details and product comparisons.

To upload the Catalog Section level Extended Attribute Groups XML file from OCM:

1. Click the Content tab.
2. Click the My Content link.
3. Click the Create Item button.



4. In the Create Item page:
 - Select content type as HTML
 - Enter the Name for the item.
 - Click Location button to select an XML file for the catalog section level extended attribute group.
 - Click the Continue button.
 - Click the Submit for Approval button.

The following are the definitions of the catalog section-level Product Extended Attribute Group XML values:

- Data Source (data_source) tag indicates the location where the extended attributes

for the products are stored. It can have the following values:

- OCM – Oracle Content Manager. In this case iStore product comparison feature will look for the Product Extended attributes stored in XML files in OCM, for every product along with other content items such as Product Small Image, and Product Large Image.
- Custom – In this case, the iStore product comparison feature will use the URL specified in the URL tag to get the product attributes in XML file format from an external application server.
- Data Source URL (data_source_url) tag identifies the data source URL, which is REST style web service used by the iStore Product Comparison feature to fetch the product extended attributes at run time in XML file format. The URL will be of the following formats:
 - Absolute (http: server_name/service_name): where server name is the external server and service is the web service (such as a JSP page), which will return the product extended attributes.
 - Relative (service_name): where service name is the web service (such as a JSP page). This JSP page must be co-located with the standard iStore JSP pages in the same server.
 - You can run the web services with the following parameters:
 - Section_id:
 - Product_id:
 - Language:
 - User_id:
- Product Comparison (productcomparison) tag identifies the product attributes for the **Compare** page. This is not a translatable attribute.
- Group Key (group_key) tag is used to define a group of attributes. This is not a translatable attribute. The following is an example of a pre-defined group key:
 - IBE_BASE – This refers to the group that will display the pre-defined attributes.
- Attribute (attribute) tag is used to define an extended attribute of the product. This is not a translatable attribute. Attribute_keys prefaced by "IBE_" programmatically fetch iStore data dynamically and are reserved. The following are pre-defined attribute keys; the values for these attributes are displayed from the iStore catalog:

- IBE_PRODUCT_NAME – Name of the product
- IBE_LIST_PRICE – List Price of the product concatenated with the Unit of Measure; not displayed by default, see Display tag for more details
- IBE_BEST_PRICE – Your Price (displayed as the Selling Price) concatenated with the Unit of Measure
- IBE_DESCRIPTION – Description of the product
- IBE_IMAGE – Small Image of the product
- IBE_PART_NUMBER – Part number of the product; not displayed by default, see Display tag for more details.

The attribute tag uses the following properties:

- Key (key) property is required and used to define the unique identifier for the XML node.
- Title (title) property is used to provide the attribute name to be displayed in the product comparison page. This is a translatable attribute.
- Type (type) property is used to define the type of the product attribute. This is not a translatable attribute. The following types are supported:
 - Text – information of type text
 - Image – Information of type images. The following image types are supported: JPEG, PNG, GIF
 - Video – Information of type Video / Audio. The following types are supported:
 - Audio/Video: MP3, FLV
 - Graphics/Animation: SWF
- Display (display) property is used to indicate if the group is displayed or hidden on the Product Comparison page. This is not a translatable attribute. If not specified, the default is "true". If this is set to "false" at the group level, then the group is not displayed.

This property is optional and used within the system default attribute group IBE_BASE. This tag is used to include or exclude the system default attributes within the default attribute group IBE_BASE for the Item Details pop-up window.

- Display (display) tag is used to indicate if the attribute row is displayed. The possible values are "true" and "false". If not specified the default is "true", indicating that the attribute row is displayed on the Product Comparison page.
- Pop-ups (popups) tag is used to define the product attributes for the Item Details pop-up window. This is not a translatable attribute.

Note: The iStore Administrator can define different product attributes in the Section Attributes XML file, which are displayed in the Item Details pop-up window. For example, the section for laptops can include product attributes for weight and color, while the section for desktops can include a product attribute just for keyboard.

- XSL Source URL (xsl_source_url) tag identifies the XSL file source URL, which is used by the Item Details pop-up window to obtain the product details in XML file format. The URL is accepted in the following formats:
 - Absolute (http://server/product_number_detail.xml): where server name is the external server and product number detail.xml is the name for the file that will return the style sheet that can be used to transform the product level XML document to define output in the Item Details pop-up window.

Note: : You can use the same key, title, type, and display properties used in the product comparison for item details XML definition.

- Predefined tags are prefaced with "IBE_" since this will be seeded by the iStore application. Customer installations therefore will be able to use the "General" section without having to define it. "IBE_" prefaced attribute_key tags will dynamically pull data from the iStore application.

The following sample XML file shows the "IBE_" reserved XML tags and uses OCM as the content repository for Item Details and Product Extended Attribute definitions:

```

<root>
<data_source>OCM</data_source>
<productcomparison>
  <group key="IBE_BASE" title="General" display="true">
    <attribute key="IBE_PRODUCT_NAME" title="Product Name" type="text"
display="true"/>
    <attribute key="IBE_LIST_PRICE" title="List Price" type="text"
display="false" />
    <attribute key="IBE_BEST_PRICE" title="Your Price" type="text"
display="true" />
    <attribute key="IBE_IMAGE" title="Image" type="video"
display="true" />
    <attribute key="IBE_DESCRIPTION" title="Description" type="text"
display="true" />
    <attribute key="VIDEO" title="Image" type="video"
display="true" />
    <attribute key="IBE_PART_NUMBER" title="Part Number" type="text"
display="false" />
  </group>
  <group key="MEMORY_CPU" title="Memory/CPU">
    <attribute key="CPU" title="CPU" type="text" />
    <attribute key="MEMORY" title="Memory" type="text" />
  </group>
  <group key="MODEM_HD" title="Modem/Hard Drive">
    <attribute key="HD" title="Hard Drive" type="text" />
    <attribute key="MODEM" title="Modem" type="text" />
  </group>
  <group key="WEIGHT_COLOR" title="Weight/Color">
    <attribute key="COLOR" title="Color" type="text" />
    <attribute key="WEIGHT" title="Weight" type="text" />
  </group>
</productcomparison>

<popups>
<xsl_source_url>http://server/product_AS72111_detail.xsl<http:
//server/product_AS72111_detail.xsl>
<group key="IBE_BASE">
<attribute key="IBE_PRODUCT_NAME" title="Product Name" type="text"
display="true"/>
<attribute key="IBE_IMAGE" title="Image" type="image"
display="true"/>
<attribute key="IBE_DESCRIPTION" title="Description" type="text"
display="true"/>
<attribute key="IBE_PART_NUMBER" title="Part Number" type="text"
display="false"/>
<attribute key="IBE_LIST_PRICE" title="List Price" type="text"
display="false"/>
<attribute key="IBE_BEST_PRICE" title="Your Price" type="text"
display="true"/>
</group>
</popups></root>

```

The following sample XML file explains the customization in the Section Attributes XML file to display the Weight, Color, and Warranty information in the Item Details pop-up window, and uses a custom server as the content repository for product comparisons:

```

<root>
<data_source>CUSTOM</data_source>
<data_source_url>http://server/get_product_extended_attributes.
jsp</data_source_url>
<productcomparison>
  <group key="IBE_BASE" title="General" display="true">
    <attribute key="IBE_PRODUCT_NAME" title="Product Name" type="text"
display="true"/>
    <attribute key="IBE_LIST_PRICE" title="List Price" type="text"
display="false" />
    <attribute key="IBE_BEST_PRICE" title="Your Price" type="text"
display="true" />
    <attribute key="IBE_IMAGE" title="Image" type="video"
display="true" />
    <attribute key="IBE_DESCRIPTION" title="Description" type="text"
display="true" />
    <attribute key="VIDEO" title="Video" type="video"
source="URL" value="0Compaq_Presario_CQ60_Notebook.flv" />
    <attribute key="IBE_PART_NUMBER" title="Part Number" type="text"
display="true" />
  </group>
  <group key="MEMORY_CPU" title="Memory/CPU">
    <attribute key="CPU" title="CPU" type="text" />
    <attribute key="MEMORY" title="Memory" type="text" />
  </group>
  <group key="MODEM_HD" title="Modem/Hard Drive">
    <attribute key="HD" title="Hard Drive" type="text" />
    <attribute key="MODEM" title="Modem" type="text" />
  </group>
  <group key="WEIGHT_COLOR" title="Weight/Color">
    <attribute key="COLOR" title="Color" type="text" />
    <attribute key="WEIGHT" title="Weight" type="text" />
  </group>
</productcomparison>
<popups>
<xsl_source_url>http://server/product_AS72111_detail.xsl<http:
//server/product_AS72111_detail.xsl>
<group key="IBE_BASE">
<attribute key="IBE_PRODUCT_NAME" title="Product Name" type="text"
display="true"/>
<attribute key="IBE_IMAGE" title="Image" type="image"
display="true"/>
<attribute key="IBE_DESCRIPTION" title="Description" type="text"
display="true"/>
<attribute key="IBE_PART_NUMBER" title="Part Number" type="text"
display="false"/>
<attribute key="IBE_LIST_PRICE" title="List Price" type="text"
display="true"/>
</group>
<group key="WEIGHT">
<attribute key="WEIGHT" type="text" display="true"/>
</group>
<group key="COLOR">
<attribute key="COLOR" type="text" display="true"/>
</group>
<group key="WARRENTY">
<attribute key="WARRENTY" type="text" display="true"/>
</group>
</popups></root>

```

Assigning Catalog Section Level Extended Attribute Groups to a Media Object

The Oracle iStore Administrator must assign the catalog section level extended attributes group to a media object, which is used to display the section level attributes

in the Product Comparison page.

To associate section level extended attributes to a media object:

1. Navigate to the Update Section page.
2. Click Media Object icon.
3. In the Media Object page, click Add Content.
4. In the Add Content page, search and select the content that you want to assign to the media object.

Refer to the Assigning Content Items to Media Object, page 10-21 for more information.

Setting Up Product Extended Attributes

The Oracle iStore Administrator defines the Product Extended Attributes at the product level, which can be displayed in the Item Details pop-up window and the Product Comparison page for a given product. The Product Extended Attributes are defined by searching and selecting a product within the iStore product catalog, and specifying a Media Object content for the product Extended Attributes Content Component. The Oracle iStore Administrator can enter unlimited Product Extended Attributes, which are used for item details and product comparisons, thus extending the product attributes that are available from inventory.

You can map the product extended attributes using an XML file, which contains the list of Product Extended Attributes that can be displayed in the Item Details pop-up window and the Product Comparison page.

To upload the Product Extended Attribute XML file from OCM:

1. Click the Content tab.
2. Click the My Content link.
3. Click the Create Item button.
4. In the Create Item page:
 - Select content type as HTML
 - Enter the name for the item.
 - Click Choose File to select an XML file for the Product Extended Attributes.
 - Click the Submit for Approval button.

The following are the definitions of the product-level Product Extended Attribute XML values:

- Header (header) tag is used to identify the selected product.
- IBE Org ID (ibe_org_id) tag is used to identify the primary key of the organization, this is the key used in the iStore catalog to uniquely identify the product. This is not a translatable attribute.
- Group (group) tag is used to identify attribute group; it specifies the reference to the Extended Attribute Group and individual sections. This is not a translatable attribute. The group tag is the parent tag for the related attribute tags. The group tag uses the following properties:
 - Key
 - Title
- Key (key) property is required and used to define the unique identifier for the XML node.
- Title (title) property is used to specify the attribute group's title; it specifies the label that will appear in the first row, first column for a group section. This is not a translatable attribute.
- Attribute (attribute) tag is required and used to define an attribute with the attribute group. This specifies the reference to the Product Extended Attributes within the groups that will appear. This is not a translatable attribute. The attribute tag uses the following properties:
 - Key

- Type
 - Source
 - Value
 - Display
- Source (source) property is used to provide the location of the multi media content, in case the type happens to be an image or a video. This is not a translatable attribute. If the value is OCM, then at the runtime, the engine will pull the media from OCM and return the corresponding content. The possible values are:
 - OCM – This means the multimedia content is stored in OCM and the Value tag will indicate the OCM access key for the content.
 - URL – This means that the multimedia content is stored in another system and the Value tag will contain the URL for accessing the item.
 - Value (value) property is used to provide the value of the attribute. This is a translatable attribute.
 - Display (display) property is used to indicate if the attribute is shown in the Product Comparison page. The possible values are "true" and "false". If not specified the default value is "true", indicating that the attribute is displayed.
 - Product Comparison (productcomparison) tag identifies the product attributes for the Product Comparison page. This is not a translatable attribute.
 - Pop-ups (popups) tag is used to define the product attributes for the Item Details pop-up window. This is not a translatable attribute.

The following sample XML file, explains the customization for the Product Extended Attributes XML file to include additional product values for Weight, Color, and Warranty in the Item Details Pop-up window:

```

<root>
<productcomparison>
  <group key="IBE_BASE" title="General" display="true">
    <attribute key="IBE_PRODUCT_NAME" title="Product Name" type="text"
display="true" />
    <attribute key="IBE_LIST_PRICE" title="List Price" type="text"
display="false" />
    <attribute key="IBE_BEST_PRICE" title="Your Price" type="text"
display="true" />
    <attribute key="VIDEO" title="Video" type="video"
source="URL" value="Compaq_Presario_CQ60_Notebook.flv">
    <attribute key="IBE_IMAGE" title="Image" type="video"
display="false" />
    <attribute key="IBE_DESCRIPTION" title="Description" type="text"
display="true" />
  </group>
  <group key="MEMORY_CPU" title="Memory/CPU">
    <attribute key="CPU" title="CPU" type="text" value="4 GHz
Pentium IV processor" />
    <attribute key="MEMORY" title="Memory" type="text" value="4 GB
DDR SDRAM memory at 266MHz"/>
  </group>
  <group key="MODEM_HD" title="Modem/Hard Drive">
    <attribute key="HD" title="Hard Drive" type="text" value="
20GB hard drive" />
    <attribute key="MODEM" title="Modem" type="text" value="
56Kbps modem, 10/100Ethernet" />
    <attribute key="FLOPPY" title="Floppy Drive" type="text" value="
Available" display="false"/>
  </group>
  <group key="COLOR_WEIGHT" title="Weight/Color">
    <attribute key="COLOR" title="Color" type="text" value="Red"
/>
    <attribute key="WEIGHT" title="Weight" type="text" value="10
Kgs" />
  </group>
</productcomparison>
<popups>
<group key="WEIGHT" title="HDTV Weight:">
<attribute key="WEIGHT" type="text" value="32 lbs"/>
</group>
<group key="COLOR" title="HDTV Color:">
<attribute key="COLOR" type="text" value="This unit comes in Black or
Silver with Black trim"/>
</group>
<group key="WARRANTY" title="Extended Warranty:">
<attribute key="WARRANTY" type="text" value="100% Parts & Labor
Covered - Zero Deductibles. If we can't fix the item, we refund you
item price. Free in-home service for large TVs/appliances. Five day
service guarantee. Cancel / Transfer anytime."/>
</group>
</popups>
</root>

```

Assigning Product Extended Attributes to a Media Object:

The Oracle iStore Administrator must assign the Product Extended Attributes to a media object, which is used to display the extended attributes in the Product Comparison page.

To associate product extended attributes to a media object:

1. Navigate to the Update Section page.

2. Click Media Object icon.
3. In the Media Object page, click Add Content.
4. In the Add Content page, search and select the content that you want to assign to the media object.

Refer to the Assigning Content Items to Media Object, page 10-21 for more information.

Using Product Comparison

Product comparison enables you to determine which products to compare before adding them to the shopping cart.

You can add products to the shopping cart directly from the **Compare** page and specify the quantities for these products on the **Shopping Cart** page.

Using Product Comparison User Interface

The Product comparison user interface provides you with options to compare products, add products to shopping cart, and return to shopping page to continue shopping.

You will find the following on the **Compare** page:

- Continue Shopping
- Add to Cart

Continue Shopping

The **Continue Shopping** navigates you back to the previous page without adding any products to your shopping cart.

Add to Cart

The **Add to Cart** enables you to select a product in the **Compare** page. You can add one product at a time. Click **Add to Cart** to continue the checkout process.

The **Add to Cart** closes the **Compare** page and navigates you to the iStore-shopping cart with the selected product.

Note: When you add a product to the shopping cart the Quantity value is set to 1. You can change it to your desired quantity.

Selecting Products for Comparisons

You can choose products from the catalog to compare. You can select a check box against each product that you wish to include for comparison.

1. The **Compare** check box is enabled only for the product detail, product multi-select, and product multi-select with section link pages in the Featured sections. Configurable products are not supported for product comparison on any selection page as the attributes of the configured products are unknown and must be configured.
2. The following iStore product catalog templates include the Product Comparison check box:
 - Single Selection Template: ibeCCtdFSubSctL.jsp
 - Multiple Selection Templates: ibeCCtdFSuStMs2L.jsp and ibeCCtdFSuStMs3L.jsp
 - Item Details: ibeCCtdAddItemBin.jsp

To select the product for comparison in the Product Line Selection page:

1. Navigate to the **Catalog** page.
2. Select two or more products to compare.
3. Click **Compare** . You can view the product comparison.
4. Click the **Continue Shopping** to return to the **Home** page.
5. Click Add to Cart for the selected product to add the product and edit the quantity on Add to Cart page and complete the checkout process.

Adding Products to the Shopping Cart

You can select any product in the **Compare** page and add it to the current shopping cart. You can specify a quantity for a product when you add it in the shopping cart.

To add the product to the Shopping Cart in the Compare page:

1. Navigate to the **Compare** page.
2. Click **Add to Cart** for the selected product. The **Shopping Cart** page appears with product information such as **Part Number**, **Item Name**, **Quantity**, **UOM**, and **Price**.
3. Click **Checkout** to complete the checkout process.

Implementing Product Search Using Enterprise Command Center (ECC)

This chapter covers the following topics:

- Overview of the Product Search Using ECC
- Running the iStore ECC Data Population Concurrent Program
- Configuring Descriptive Flexfields for Search
- Running the iStore Data Load Programs
- Displaying the Required Descriptive Flexfield (DFF) Attributes in Available Refinements
- Setting ECC Search Profile Options

Overview of the Product Search Using ECC

Following is the process flow for the ECC product search.

You can embed and utilize the advanced search capabilities that ECC offers to search and display items from the Oracle iStore product catalog, as well as filter on various data. This enables iStore users to search on a customer part number, cross reference part number, and locate products with automatically suggested searches. Users can also filter on price ranges and perform product comparisons to highlight product differences.

To enable this functionality, you must set up an ECC plug-in, which allows iStore users to access the functionality through the **Advanced Search** link within iStore or as the default landing page.

Advanced Search Link

The screenshot displays the Vision Electric website interface. At the top, the navigation bar includes the Vision Electric logo and links for Home, Motors, Bearings, Blowers, and Support. A search bar is located below the navigation bar, with a dropdown menu set to 'All Products' and a 'Go' button. The 'Advanced Search' link is highlighted in the search bar area. The main content area features a 'Hot Deals' section with four product listings: Vision Pad DX - Mobile Computer, Washdown Duty Motor, Lightning Inkjet Printer, and ZAC Motor. Each listing includes a product image, a brief description, retail and your prices, and an 'Add to Cart' button. The right sidebar contains a 'Welcome Guest' message with links for Login, Register, View Shopping Cart, View Saved/Shared Carts, View Shopping Lists, View Quotes, Setup Express Checkout Preferences, and Have us call you back. The bottom of the page has a blue footer bar with links for Sites, Cart, Order, Profile, Login, and Register.

The image shows the **Advanced Search** link in Oracle iStore.

Note: You can configure the **Advanced Search** link to launch the ECC product search in Oracle iStore. You must set the profile IBE: Enable ECC Search to Yes.

ECC Search Page Launched in Oracle iStore

The screenshot shows the Oracle iStore ECC Search page. The header includes the 'VISION enterprises Vision Electric' logo and navigation links for Home, Motors, Bearings, Blowers, and Support. A search bar is located at the top right. On the left, there is a sidebar with 'Selected Refinements' (No filters are selected) and 'Available Refinements' (Catalog Assistance, Pricing, Additional Details). The main content area displays search results for three products: a 1.50 HP Washdown Duty Motor, a 2 HP Explosion Proof Motor, and a Ball Bearing. Each product listing includes an image, a title, a brief description, and pricing information (Retail Price and Your Price). The page also shows a pagination control at the bottom indicating 'Page 1 of 10 (1-3 of 28 items)'.

The image shows the ECC Search page launched in Oracle iStore.

Note: You can set up the ECC Search page to launch first without clicking the **Advanced Search** link in iStore. To enable the ECC Search page as the landing page, you must set the profiles IBE: Enable ECC Search and IBE: Use ECC Search for Landing Page to Yes.

This page is organized with the search refinements on the left, and the search capability and search results on the right. The search refinements are categorized into the following groups

- **Catalog Assistance:** Search by product name, product number, description, item type and other refinements, including customer part number, cross reference part number, and cross reference type.
- **Pricing:** Search and sort using prices and price ranges.

- **Additional Details:** Search using descriptive flexfield (DFF) attributes. **Additional Details** is the customer defined label of the Items DFF. If you configure the Items DFF, then iStore users can refine their searches using the DFF attributes.

The search results display data graphically, in list, tabular, and grid view. These views include the **Record Details** icon that shows information for search results. iStore users can also take advantage of the ECC product comparison features, comparing many products alongside one another and highlighting their differences.

For more information about searching for and refining data in enterprise command centers, see: Overview of Enterprise Command Centers, *Oracle E-Business Suite User's Guide*.

Additional Information: For more information about searching for and refining data in Oracle Enterprise Command Centers, see "Search" under Highlights of an Enterprise Command Center, *Oracle E-Business Suite User's Guide*.

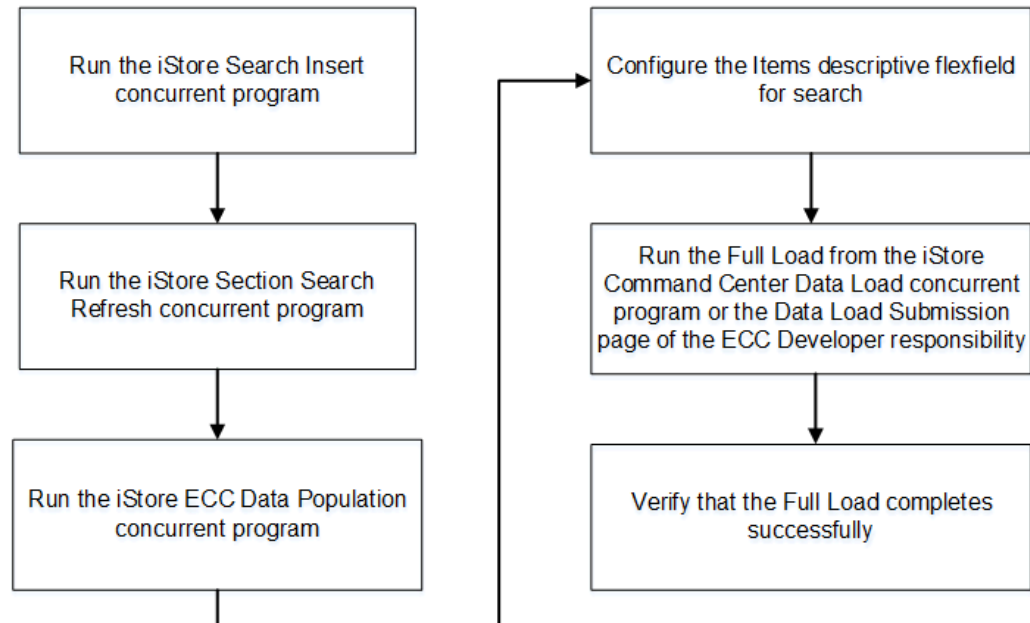
To configure the ECC you must define the IBE: Enable ECC Search profile and run the iStore ECC Data Population program as well as the other programs noted in the "ECC Setup Flow" that follows. Optionally, you can refine the ECC search by setting the IBE: Use ECC Search for Landing Page and IBE: Update Customer Pricing in ECC profile options. See "Running the iStore ECC Data Population Concurrent Program", page 8-7 and "Setting ECC Search Profile Options", page 8-21.

Caution: Performance issues that slow the loading of pages can occur if the IBE: Update Customer Pricing in ECC profile is Yes, as a pricing call is made for each item in the price list.

Further reference: *Installing Oracle Enterprise Command Center Framework, Release 12.2*.

ECC Setup Flow

ECC Setup Flow



The image shows the setup flow for the iStore ECC. The steps are as follows:

1. Set the profile IBE: Use ECC Search to Yes.
2. Run the iStore Search Insert concurrent program. See "Running the iStore Search Insert Concurrent Program", page 7-32.
3. Run the iStore Section Search Refresh concurrent program to update the iStore base search tables. See "iStore Section Search Refresh", page 35-2.
4. Run the concurrent program iStore ECC Data Population, which updates the iStore ECC price table and view. See "Running the iStore ECC Data Population Concurrent Program", page 8-7.
5. Configure the **Items** descriptive flexfield for search. See "Configuring Descriptive Flexfields for Search", page 8-8.
6. Run the full load to load data to the ECC data store using any one of the following:
 - The iStore Command Center Data Load program. When you run this program with the Full Load option, the program first loads metadata before running the full load. Therefore, metadata load submission is not required.

- The Data Load Submission page of the ECC Developer responsibility. If you submit data load through this process, then you must run data load first with Metadata Load option and then the Full Load option.

See "Running the iStore Data Load Programs", page 8-10.

7. Verify that Full Load completes successfully and that the ibe-search dataset is loaded with the data.
8. Confirm the iStore Product Search appears in the ECC search interface.

The existing menu iStore Customer UI Menu Root, IBE_C_ROOT is the menu for the default iStore user responsibility IBE_CUSTOMER. The menu has been modified by adding these four new ECC related form functions:

Function Name	User Function Name	Description
IBE_ECC_GLOBAL_SEARCH_HOME	iStore ECC Global Search Home Launch	OAF page that contains the Global Search ECC page
IBE_ECC_GLOBAL_SEARCH	iStore ECC Global Search Page	Global Search ECC page
IBE_ECC_SEARCH_RESULTS_HOME	iStore ECC Search Results Home Launch	OAF page that contains the ECC Search page
IBE_ECC_SEARCH_RESULTS	iStore ECC Search Results Page	ECC Search Results page

This allows iStore users with the IBE_CUSTOMER responsibility to use the iStore ECC search feature for any minisite, which is tied to the IBE_CUSTOMER responsibility. If a customer wants to extend the iStore ECC search facility to the minisites with other responsibilities, then the iStore merchant must add these four functions to the menu for that responsibility.

Note: For guest user access to the iStore ECC search pages, the iStore merchant must assign IBE_CUSTOMER responsibility to the GUEST user. Without this step, the guest user cannot access the iStore ECC feature.

Running the iStore ECC Data Population Concurrent Program

For an overview, see "Overview of the Product Search Using ECC", page 8-1.

To enable the ECC search for the customer application for the first time, you must run the iStore ECC Data Population program. The ECC search is supported in the iStore section-level product search. The setup required for section-level search must also be set. See "Populating the Section-Level Search Table", page 7-33.

To populate the IBE_ECC_SEARCH_PART_PRICE table, and to update the IBE_ECC_SEARCH_V view with the data, run the iStore ECC Data Population program. Through the full load or incremental load, the data is uploaded into the ECC server. You can then use the ECC search to search on the top of the ibe-search data set, which includes all the data.

Additional Prerequisites: You must define the following profile options that configure the ECC search in Oracle iStore.

- The profile option IBE: Enable ECC Search is set to Yes at the site, application, responsibility, or user level.
- Optionally, the profile option IBE: Use ECC Search for Landing Page is set to Yes at the site, application, responsibility, or user level.
- Optionally, the profile option IBE: Update Customer Pricing in ECC is set to Yes at the site level.

See "Setting ECC Search Profile Options", page 8-21.

Steps:

1. Log in to Oracle Forms with the iStore Concurrent Programs responsibility.
2. Select **Single Request** and click **OK**. The **Submit Request** window opens.
3. In the **Name** field, select **iStore ECC Data Population** and enter the following values:

Field	Value
Value Program	iStore ECC Data Population
Enabled	Checked
Short Name	IBEECCDP

Application	iStore
Description	Concurrent program to populate ECC Data including the price and section hierarchy
Executable Name	IBEECCDP
Executable Method	PL/SQL Stored Procedure
Use in SRS	Checked
Restart on System Failure	Checked
NLS Compliant	Checked

4. Click **Submit** to start the concurrent request. Note the request ID.

Configuring Descriptive Flexfields for Search

For an overview, see "Overview of the Product Search Using ECC", page 8-1.

Enterprise command centers support searching on descriptive flexfields (DFFs) attributes.

For additional information about configuring and customizing flexfields, see the *Oracle E-Business Suite Flexfields Guide* and My Oracle Support Knowledge Document 2495053.1, *Installing Oracle Enterprise Command Center Framework, Release 12.2*.

The following table describes the DFFs that are available in the ECC iStore, **Advanced Search** page.

Data Set	DFF Title	DFF Name	DFF Attribute Group Name	Displayed in
iStore Search (ibe-search)	Items	MTL_SYSTEM_I TEMS	Additional Details	<ul style="list-style-type: none"> • Available Refinements • Search Results table: <ul style="list-style-type: none"> • In the List and Grid views, click the Record Details icon. • In the Table View, select Additional Details and click the Record Details icon • In Search Results views (Table, List, and Grid), select more than one row and click Compa

Data Set	DFF Title	DFF Name	DFF Attribute Group Name	Displayed in
				re to view Additional Details on the Compare page

After you configure the Items DFF, specify context values for product searches using the **Inventory Item** window or the **Product Detail** page of the iStore Administrator responsibility. See "Setting up DFFs for Product Detail Pages", page 36-9 for more information.

Steps After Configuring the Items DFF

After completing the Items DFF setup:

1. Run the full load from the **iStore Command Center Data Load** concurrent program or the **Data Load Submission** page of the ECC Developer responsibility to load the DFF data to the ECC data store. See "Running the iStore Data Load Programs", page 8-10.
2. Determine the Items DFF attributes that you want to display in the **Additional Details** attributes group in **Available Refinements**. See "Displaying the Required Descriptive Flexfield Attributes in Available Refinements", page 8-12.

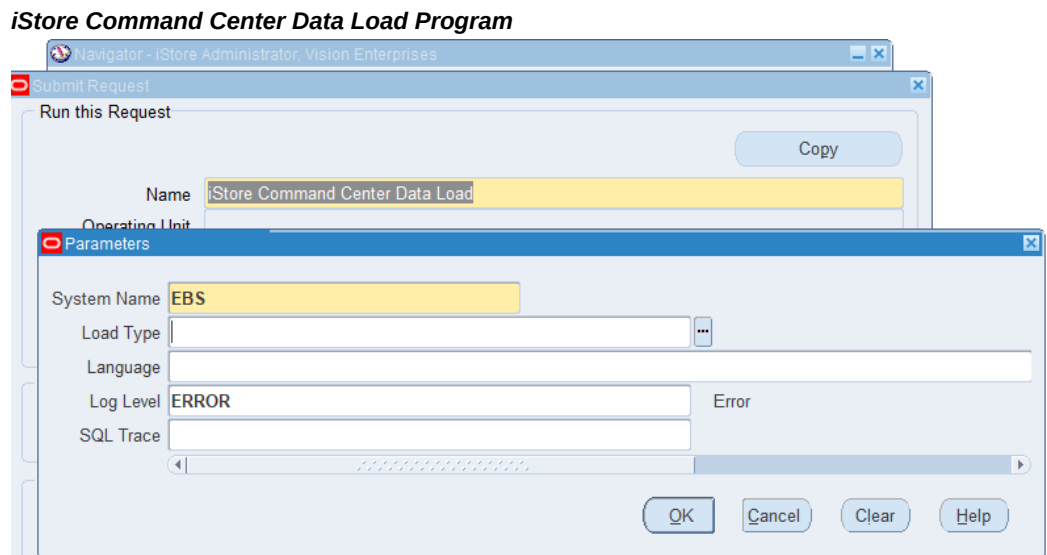
Running the iStore Data Load Programs

For an overview, see "Overview of the Product Search Using ECC", page 8-1.

You can populate the ECC data store with the iStore data using one of the following methods:

- Run the iStore Command Center Data Load program.
- Submit a data load request using the Data Load Submission page.

Running the iStore Command Center Data Load Program



Use the iStore Administrator responsibility to run the iStore Command Center Data Load concurrent program.

1. Navigate to the **Submit Request** window (iStore Administrator responsibility > iStore Concurrent Programs).
2. In the **Name** field, enter **iStore Command Center Data Load**.
3. Select the appropriate load type.
 - **Full Load:** Loads all data from Oracle E-Business Suite. When you run the program with this option, the program first loads metadata before running the full load.
 - **Incremental Load:** Loads only the data that has been modified since the previous load. Schedule incremental load to run as often as required to keep the ECC page current.
 - **Metadata Load:** Loads Descriptive Flexfield (DFF) metadata. To enable DFFs in iStore, you must first run the load program with the **Load Type** parameter set to **Metadata Load**. Then, run the program with the **Full Load** option so that the DFF attributes are loaded to the ECC data store.
4. In the **Language** field, enter one or more language codes for the output. For multiple language codes, use the format AA,BB,NN. For example, enter US,AR,KO. If the field is left blank, then the data will be loaded for the base language only

(usually US).

5. Select the log level that you want the program to report. The default value is **Error**.
6. Select **True** to enable SQL trace. Otherwise, select **False**.
7. Submit the concurrent request.
8. Review your request using the **Requests** page.

Submitting a data load request using the Data Load Submission page

Use the ECC Developer responsibility and submit a request in the **Data Load Submission** page for the iStore data set. Monitor data loading using the Data Load Tracking page.

Data Load Submission Page

ORACLE

Home Favorites Settings Worklist | Logged In As OPERATIONS Help Logout

Home

Data Designer

Data Sets

Metadata

Administration

Activity Audit

Source System

Database Connections

Data Load Submission

Data Load Tracking

Export/Import

About

Data Load Submission

Load data for all data sets within an application or for a specific data set

Submit Cancel

* Application Name iStore

* Data Set iStore Search (ibe-search)

Load Type Full Load

Default Language US

Languages AR X KO X ZHS X ZHT X PTB X

Log Level Error

Enable SQL Trace

For details about ECC data population, see the *Oracle E-Business Suite Administering Enterprise Command Centers* guide.

Displaying the Required Descriptive Flexfield (DFF) Attributes in Available Refinements

For an overview, see "Overview of the Product Search Using ECC", page 8-1

After you configure the "Items", page 8-8 DFF and run the full load, the data load process uploads the DFF attribute structure and values to the ECC data store under the **ITEM_DFF_DETAILS** attribute group. By default, the DFF attributes are not available as search refinements in iStore Advanced Search.

Based on your business requirements, determine the DFF attributes that you want to include as search refinements. To display the selected DFF attributes in **Available**

Refinements, modify the metadata for the "ibe-search" data set.

After you complete the setup, the corresponding DFF attributes are available as search refinements based on the following rules. The Available Refinements component:

- Automatically displays the Global DFF attributes.
- Displays the context-based DFF or additional attributes when the data condition of a trigger attribute is met.

Displaying the Required DFF Attributes in Available Refinements

To display the required DFF attributes in Available Refinements:

1. Navigate to the **Metadata** page using the ECC Developer responsibility.
2. In the **Data Set** field, select **iStore Search (ibe-search)**.
3. Click the **Attributes Group** tab.

Metadata Page

The screenshot shows the Metadata page in Oracle Enterprise Command Center (ECC). The page title is "Metadata" and the subtitle is "Manage options and precedence rules of data sets attributes". The "Data Set" field is set to "iStore Search (ibe-search)". The "Attributes Group" tab is selected. The table below shows the attribute groups:

Sequence #	Group Key	Group Name	Custom Display Name	Include In User Actions
1	CATALOG_ASSISTANCE	Catalog Assistance		<input checked="" type="checkbox"/>
2	PRICING	Pricing		<input checked="" type="checkbox"/>
3	ITEM_DFF_DETAILS	Items	Additional Details	<input checked="" type="checkbox"/>

The expanded view for the "ITEM_DFF_DETAILS" group shows the following attributes:

- Attribute Name: Manufacture (IBEITEM_MANUFACTURE)
- Attribute Name: Type (IBEITEM_TYPE)
- Attribute Name: Category (IBEITEM_CATEGORY)
- Attribute Name: Context (IBEITEM_CONTEXT)

4. Expand the **ITEM_DFF_DETAILS** attribute group (the custom display name is Additional Details).
5. Review the attributes of this attribute group.

6. Select the DFF attributes that you want to display in **Available Refinements, Additional Details** attribute group. Use this process to include or remove the DFF attributes.

Modifying Precedence Rules

You can also modify precedence rules to control the behavior of the contextual DFF attributes. Precedence rules control dynamic disclosure of additional attributes in the Available Refinements component. Use these rules to display additional attributes only when a certain data condition of a trigger attribute is met. You define precedence rules in terms of a trigger value and a target attribute, where the trigger value reveals an additional target attribute to the user.

Example 1

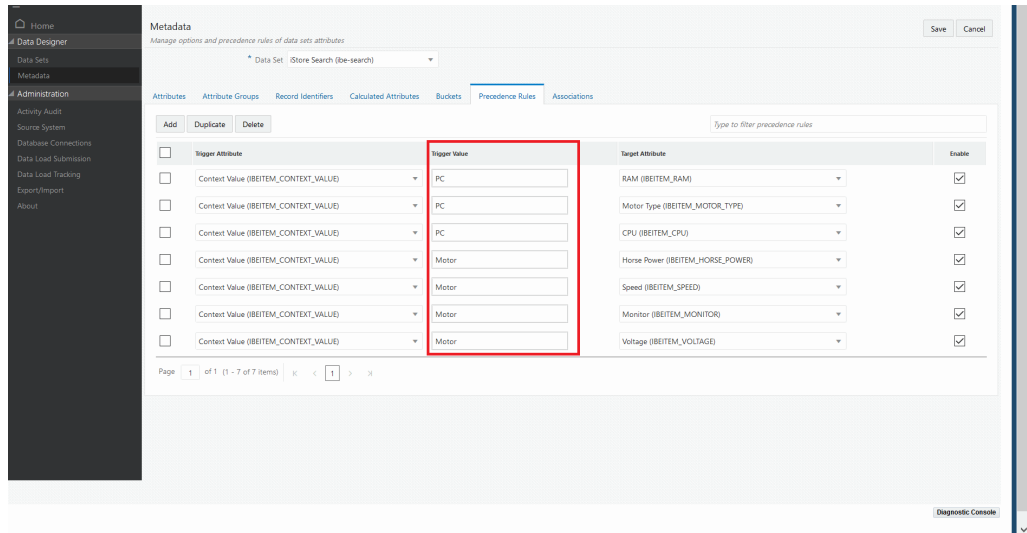
For example, configure the Items DFF with the following global segments:

- Manufacture
- Type
- Category

After data load, modify the precedence rule for Category to control the contextual DFF behavior based on the value of the Category.

The trigger value that you set for a precedence rule determines the availability of contextual DFF attributes.

Precedence Rules Tab



Set PC as the trigger value for the following target attributes as shown in the table.

Attribute Group	Trigger Value	Target Attribute
Category	PC	RAM
		CPU
		Monitor

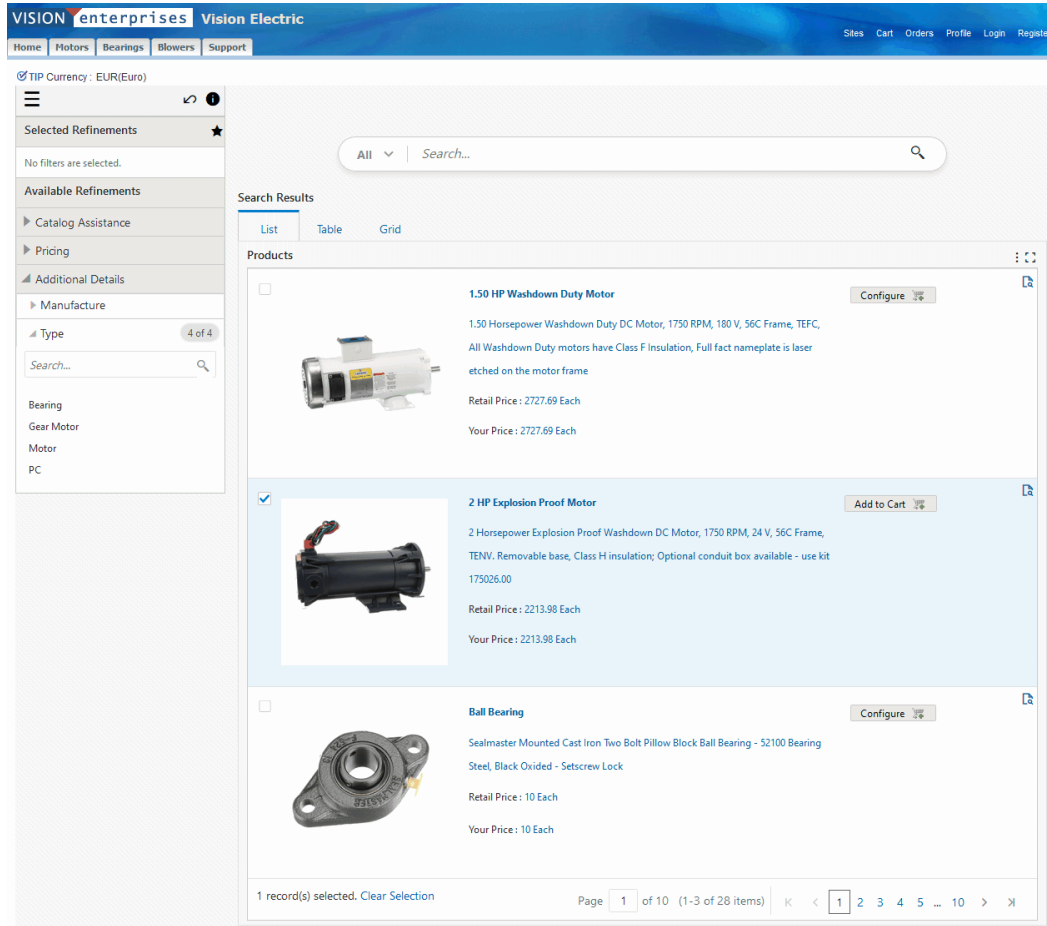
On the iStore, **Advanced Search** page, if iStore users search with "PC" as the category value, then the corresponding contextual attributes RAM, CPU, and Monitor will be available, and these DFF attributes are shown as further search refinements.

Example 2

Similarly, if you set Motor as the trigger value for the Horse Power, Speed, and Voltage target attributes, then when iStore users search with the category value of "Motor", the contextual DFF attributes Horse Power, Speed, and Voltage will be available for the additional search refinements.

In the following example, an iStore user searches for motors using the Additional Details search refinement.

The following screenshot shows search results for Washdown Motors in the List view.



Now, the user clicks Additional Details, and then Type, and selects Motor as the refinement.

The following screenshot shows selection of the value Motor as the refinement.

VISION enterprises Vision Electric

Home Motors Bearings Blowers Support Sites Cart Orders Profile Login Register

TIP Currency: EUR(Euro)

Selected Refinements: No filters are selected.


Available Refinements:

- Catalog Assistance
- Pricing
- Additional Details
- Manufacture
- Type (3 of 4)
 - Bearing
 - Gear Motor
 - PC


Search: All Search...

Search Results: List Table Grid


Products:

- 1.50 HP Washdown Duty Motor** Configure


1.50 Horsepower Washdown Duty DC Motor, 1750 RPM, 180 V, 56C Frame, TEFC, All Washdown Duty motors have Class F Insulation, Full fact nameplate is laser etched on the motor frame

Retail Price : 2727.69 Each
Your Price : 2727.69 Each
- HP Explosion Proof Motor** Add to Cart


Horsepower Explosion Proof Washdown DC Motor, 1750 RPM, 24 V, 56C Frame, TENV. Removable base, Class H insulation; Optional conduit box available - use kit 175026.00

Retail Price : 2213.98 Each
Your Price : 2213.98 Each
- Ball Bearing** Configure


Sealmaster Mounted Cast Iron Two Bolt Pillow Block Ball Bearing - 52100 Bearing Steel, Black Oxidized - Setscrew Lock

Retail Price : 10 Each
Your Price : 10 Each

0 record(s) selected. Page 1 of 10 (1-3 of 28 items) 1 2 3 4 5 ... 10 > <

The following screenshot shows further refinements for Motor.

VISION enterprises Vision Electric

Home Motors Bearings Blowers Support Site Cart Orders Profile Login Register

TIP Currency: EUR(Euro)

Selected Refinements

Type

Motor

Available Refinements

Catalog Assistance

Pricing

Additional Details

Type 3 of 3

Search...

Bearing

Gear Motor

PC

Speed

Motor Type

Voltage

Horse Power


All Search...

Search Results

List Table Grid


Products

1.50 HP Washdown Duty Motor [Configure](#)

 1.50 Horsepower Washdown Duty DC Motor, 1750 RPM, 180 V, 56C Frame, TEFC, All Washdown Duty motors have Class F Insulation, Full fact nameplate is laser etched on the motor frame


Retail Price : 2727.69 Each
Your Price : 2727.69 Each

2 HP Explosion Proof Motor [Add to Cart](#)

 2 Horsepower Explosion Proof Washdown DC Motor, 1750 RPM, 24 V, 56C Frame, TENV, Removable base, Class H insulation; Optional conduit box available - use kit 175026.00

Retail Price : 2213.98 Each
Your Price : 2213.98 Each

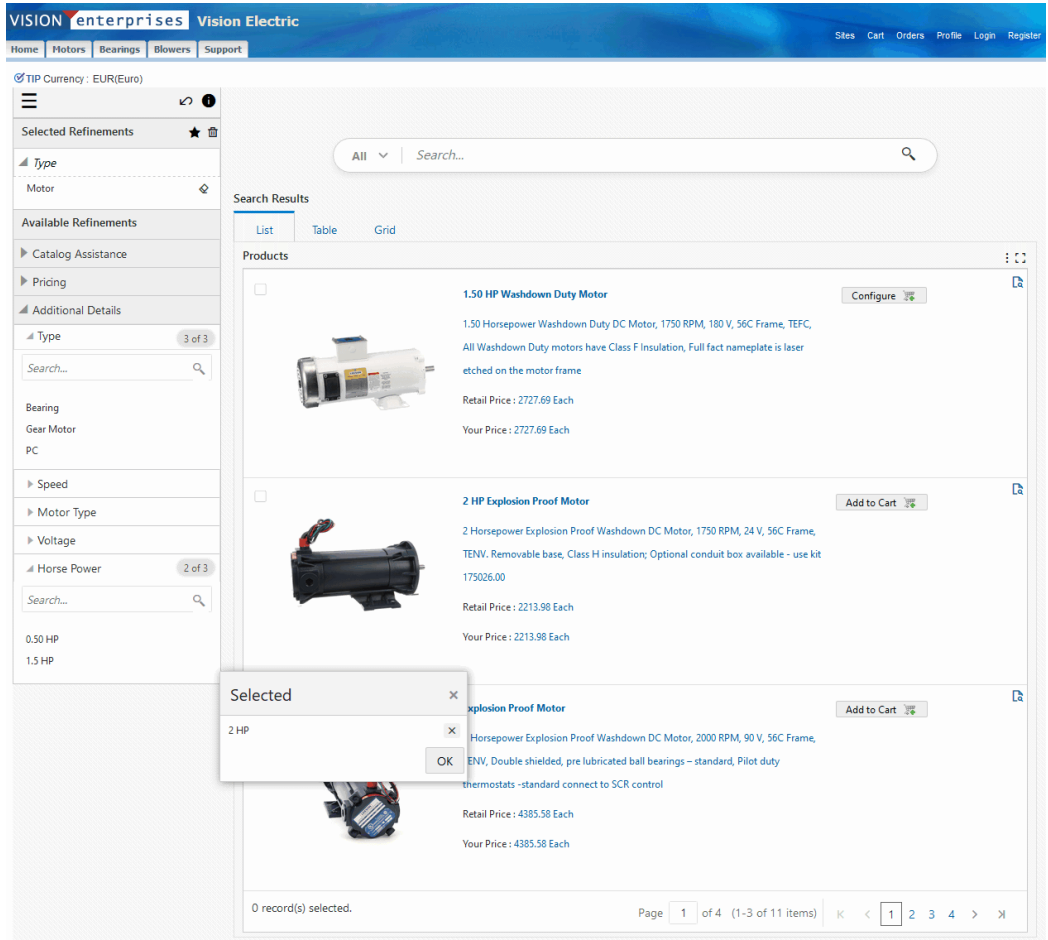
Explosion Proof Motor [Add to Cart](#)

 2 Horsepower Explosion Proof Washdown DC Motor, 2000 RPM, 90 V, 56C Frame, TENV, Double shielded, pre lubricated ball bearings - standard, Pilot duty thermostats - standard connect to SCR control

Retail Price : 4385.58 Each
Your Price : 4385.58 Each

0 record(s) selected. Page 1 of 4 (1-3 of 11 items) < 1 2 3 4 >

The user selects 2 HP as shown in the following screenshot.



The following screenshot shows the results for the 2 HP search refinement in the List view.

VISION enterprises Vision Electric

Home Motors Bearings Blowers Support Sites Cart Orders Profile Login Register

TIP Currency : EUR(Euro)

Selected Refinements

- Type
 - Motor
- Horse Power
 - 2 HP

Available Refinements




- Catalog Assistance
- Pricing
- Additional Details
 - Speed
 - Motor Type
 - Voltage
- Horse Power 2 of 2
 - 0.50 HP
 - 1.5 HP

Search... All Search...

Search Results

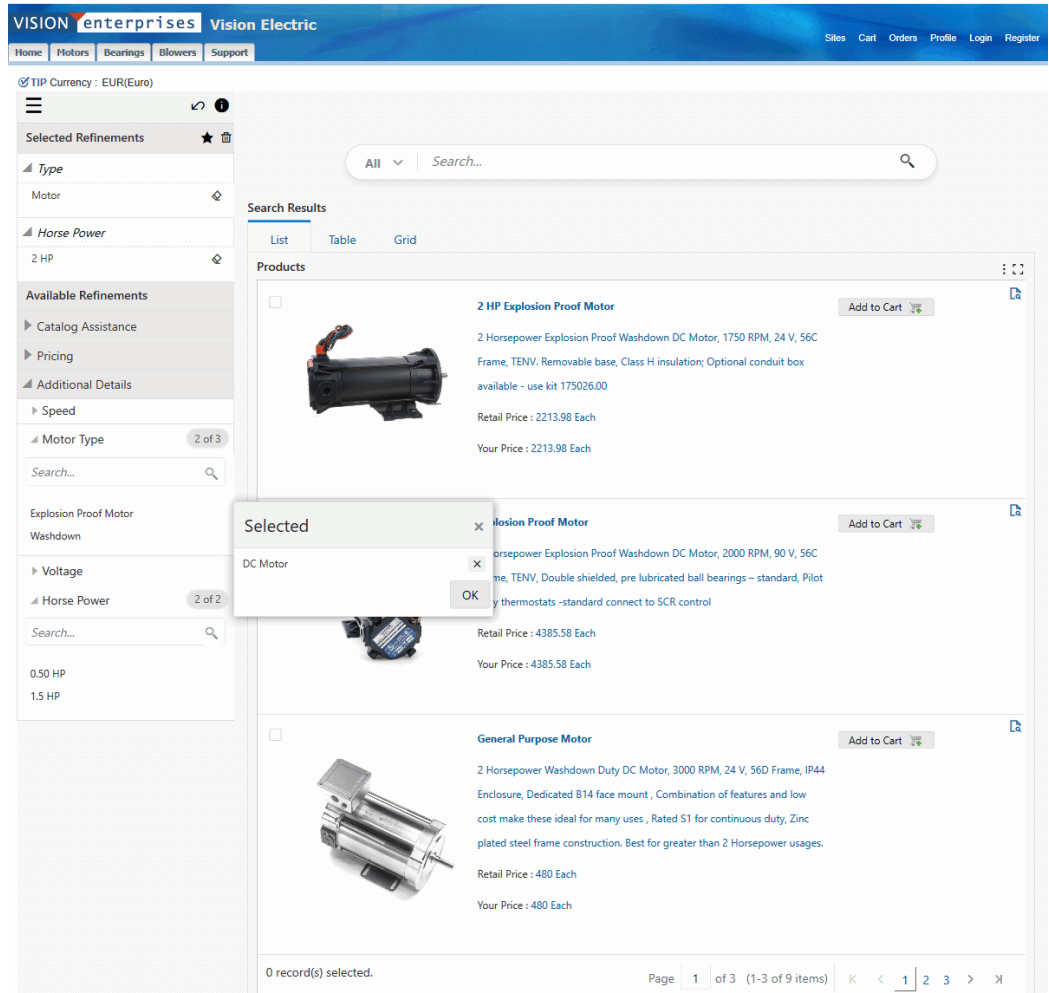
List Table Grid

Products

<input type="checkbox"/>	 <p>2 HP Explosion Proof Motor Add to Cart</p> <p>2 Horsepower Explosion Proof Washdown DC Motor, 1750 RPM, 24 V, 56C Frame, TENV, Removable base, Class H insulation; Optional conduit box available - use kit 175026.00</p> <p>Retail Price : 2213.98 Each Your Price : 2213.98 Each</p>
<input type="checkbox"/>	 <p>Explosion Proof Motor Add to Cart</p> <p>2 Horsepower Explosion Proof Washdown DC Motor, 2000 RPM, 90 V, 56C Frame, TENV, Double shielded, pre lubricated ball bearings - standard, Pilot duty thermostats -standard connect to SCR control</p> <p>Retail Price : 4385.58 Each Your Price : 4385.58 Each</p>
<input type="checkbox"/>	 <p>General Purpose Motor Add to Cart</p> <p>2 Horsepower Washdown Duty DC Motor, 3000 RPM, 24 V, 56D Frame, IP44 Enclosure, Dedicated B14 face mount , Combination of features and low cost make these ideal for many uses , Rated S1 for continuous duty, Zinc plated steel frame construction. Best for greater than 2 Horsepower usages.</p> <p>Retail Price : 480 Each Your Price : 480 Each</p>

0 record(s) selected. Page 1 of 3 (1-3 of 9 items) < 1 2 3 > X

The user can also filter by Motor Type as shown in the following screenshot.



Setting ECC Search Profile Options

For an overview, see "Overview of the Product Search Using ECC", page 8-1

Oracle iStore search requires that several iStore profile options be set.

For all search profile option descriptions and the recommended values, see the appendix, "Profile Options", page A-1.

As noted in "Overview of the Product Search Using ECC", page 8-1, you can define profile options that enable and configure the ECC search in Oracle iStore.

The following profiles are specific to the ECC search:

- IBE: Enable ECC Search
- IBE: Use ECC Search for Landing Page

- IBE: Update Customer Pricing in ECC

Implementing the Catalog

This chapter covers the following topics:

- Overview of Implementing the Catalog Chapter
- Understanding Customer Application Page Display
- Display Templates Overview
- Catalog Overview
- Understanding Section Display
- Section Templates Overview
- Section Templates
- Product Templates
- Creating and Maintaining Sections
- Maintaining Products in Sections
- Configuring Bin Placement and Content
- Mapping Source Files to Display Templates
- Setting up Section Display Templates Text Messages
- Using Product Relationships
- Direct Punchout Catalog

Overview of Implementing the Catalog Chapter

This chapter contains information on implementing the Customer Application product catalog in Oracle iStore, including creating the section hierarchy and adding products to the sections.

Understanding Customer Application Page Display

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

In the Customer 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, including:

- **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. See the section, "Display Templates Overview", within this chapter, for more information.
- **Section and Product Hierarchy:** Using sections and their products organized into a hierarchal structure, your product catalog is presented through a powerful section and product catalog building tool.
- **Content:** Oracle iStore features flexible and reusable content tools. To present product images and HTML content in your specialty sites, you map content components to media objects, which are in turn linked to the content files. To present messages, you utilize hundreds of seeded text messages, some of which also are reusable media objects. See the chapter, *Implementing Content*, page 10-1, for more information.

Although many customers do customize Oracle iStore, given the application's range of configuration options, customizing is not necessary.

Display Templates Overview

This section contains general information on Display Template functionality within Oracle iStore.

Display Templates Present the Customer Application

Oracle iStore is supplied with over 800 Display Templates that present the Customer Application pages. In addition, you can create your own templates for use in the sites. Each template has a specific display purpose, depending upon which element of the customer-facing application it displays. The template categories are known as *Applicable To* categories in the Site Administration Application.

In order for a Display Template to present an element of the Customer Application, it must link to a source file --- this is where its content comes from. This source file

typically is a Java Server Page (JSP). The seeded Display Templates that present the default Customer Application are linked to source JSPs. Other templates are left without source JSP files, so that you can configure your own Customer Application presentation with your own source JSPs.

Many of Oracle iStore's Display Templates can call logical media objects and content components to present image and HTML content. These can be any type of image file, such as .gif, .jpg, .bmp, etc., or HTML content in the form of .htm files. Some of the Display Templates present this type of content by calling seeded content components that are located within them. To map content, you must link content components to a logical media object, which you in turn map to the physical source content file (.gif, .htm, etc.). Each Display Template, depending upon its usage, contains the programmatic access names of specific content components. It uses these programmatic access names to call the components. Other Display Templates can call media objects directly. Some section Display Templates can understand content as well.

See the appendix, Seeded Display Data, page C-1, for a list of templates and categories.

Display Template Characteristics

Display Templates have the following features:

- **Display Name:** This is the template's name, to be used for your internal business purposes. The template name appears in the Site Administration Application, but cannot be seen in the Customer Application.
- **Programmatic Access Name:** This is a unique code used by template processing pages to determine what to do with the template. The template programmatic access name appears in the Site Administration Application, but cannot be seen in the Customer Application.
- **Source Files:** Each template used in the Customer Application must have a source JSP mapped to it for each site/language mapping for which it will be used. The source JSP determines the content of the page area covered by the template.
- **Description:** This is an internal description, meant for your own business purposes, that provides information about the use of the template. The template description appears in the Site Administration Application, but cannot be seen in the Customer Application.
- **Keywords:** After you enter them in the system, keywords can be used to search for templates in the Site Administration Application. These keywords cannot be seen by customers.
- **Applicable To:** The *Applicable To* designation of a template is a display category that describes its purpose.

Creating New Display Templates

You also can register your own templates to link with your own JSP files, in order to customize the presentation of the Customer UI display. See the chapter, *Advanced Display*, page 36-1, for details.

Note: During upgrades, Oracle iStore does not alter custom templates and their JSP mappings, nor does it overwrite mappings of JSP files to specific site-language combinations.

Importing or Exporting Display Template Mappings

Oracle iStore's Display Template Mappings Import/Export functionality for Template Manager allows you to transfer template mappings between instances using XML files. See the chapter, *Advanced Display*, page 36-1, for details.

Catalog Overview

The catalog you build using Oracle iStore's sections and products allows you organize your sites into hierarchal sections with products, and to re-use the sections, their products, and any associated content, in one or multiple sites. You also can choose to exclude specific sections, subsections, or products from sites.

In combination with the Display Templates, your site sections --- connected in a parent-child fashion --- help determine the browsing path for the customer in your Customer 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 organize and present your product catalog.

Use the Sections and Products pages within the Catalog tab in the Site Administration Application to perform section-product creation and maintenance tasks.

Using the Sections pages, you can:

- Create sections
- Duplicate existing sections, including all products and content
- Assign Display Templates to sections to determine the layout of the sections
- Assign products to sections -- either automatically or manually
- Assign or exclude sections to/from site(s)
- Preview sections in the context of the specialty site(s) in which they appear
- Delete sections

- Rename sections
- Use the search utility to search for sections

For more information on products, see the chapter, *Implementing Products*, page 7-1.

Implementing Sections

In your initial implementation, the section hierarchy will consist of a single parent node, called Root. To this single node, you can add as many subsections as you wish, as long as you follow certain rules for section type (see the "Section Types" section). Your products "hang" upon the sections and subsections of the hierarchal tree.

Each site points to a single node of the section hierarchy. This node is known as the site's *root* section -- the site root section can be either the main (initial) Root node or one of the other main or subsections that you create. In the specialty sites that include the section, the sites' navigation is driven from the first top-level section in the hierarchy.

Catalog Hierarchy Guidelines and Behavior

Consider the following guidelines and behavior when building the section-product hierarchy:

- Set up the top-level sections in the section hierarchy first. See the section, "Creating and Maintaining Sections", within this chapter, for more information.
- Each top-level section will have the main Root node as its parent.
- For each top-level section, you can create as many subsections as you wish. Each subsection also can have as many other subsections as you wish, as long as you follow the rules for section types; see the "Section Types" section, for these rules.
- When assigning a parent section to a site, do not choose unpublished or non-active sections, as this will cause incorrect rendering in the Customer Application. If you wish to make a site unavailable to customers, end-date the site.
- In the Customer Application, the Site Home Page will display the first navigational subsection under the Root section, not the root section page itself.
- To present Featured sections on the Site Home Page, make them subsections of the first Navigational subsection.
- If the root section has both Navigational and Featured subsections, the Navigational subsection will not be displayed in catalog pages.

For example, under the parent section *Vision Computers and Support*, *Home* is a navigational sub-section and *Hot Deals* is a Featured sub-section. *Hot Deals* section is displayed on the Product catalog page.

- You can create groups of featured products at any level in the hierarchy by creating a subsection of type Featured in a Navigational section and then adding products to that Featured section.
- You can assign individual products one-at-a-time to sections in the Products pages, and you can add a single or multiple products to a section at one time, using the Sections pages. See the sections: "Adding Products to Sections Using the Products Pages", and "Adding Products to Sections Using the Sections Pages", within this chapter, for details.
- You also can use the Product Autoplacement functionality to populate Leaf sections with products from Inventory categories. See the chapter, Implementing Products, page 7-1, for details.
- The top-level sections appear as tabs across the top of the Customer Application Web sites, and second-level sections appear as subtabs and in the Browse Bin. The number of tabs and subtabs that appear can be controlled by setting profile options. See the section, "Section and Product Display Profile Options", within this chapter, for details.
- A Navigational section containing a Featured subsection and other subsections shows the products in the Featured section in the middle of the page and the other subsections in the Browse Bin.
- If a section contains only products, it lists the products in the middle.
- Products will not appear in the Customer Application unless you publish them in a published section appearing in a published site. Also, the effective dates of the products, sections, and sites must be valid to appear in the Customer Application.
- In the Customer Application, when a user accesses a section which has a Featured subsection, the page flow automatically routes the user to the Featured subsection. Thus, in this scenario, the template mapped to the parent section of the Featured section determines the display of the Featured subsection, not the template mapped to the Featured subsection itself. Therefore, as a best practice, for the parent section of a Featured section, map a template whose category is Template for Section Contains Featured Subsections. Additionally, to preview a featured subsection in the Site Administration Application, preview the parent section to see the display of the featured subsection, not the featured subsection itself.
- The Item Details icon is associated with a product. When you click on the Item Details icon the extended product attributes are displayed. The Item Details pop-up window allows the iStore user to add the product and quantity to the shopping cart directly without navigating to the Shopping Cart page.
- From a single-line or multi-line display template, the iStore user can click on the Item Details icon to view product content. The iStore user can view the additional

content defined in Oracle Inventory or defined by the iStore Administrator in the Section Attributes or the Product Extended Attributes XML file. This is the Item Details process flow for the B2B and the B2C iStore user.

You can find more information in the following sections:

- "Product Statuses: Published or Unpublished" (within this chapter)
- "Section Statuses: Published or Unpublished" (within this chapter)
- "Create a Site: Getting Started and Entering Basic Information" (in the chapter, *Implementing Site Management*, page 5-1.)

Section Types

Site sections are of two basic types: Featured and Navigational. A third category, Leaf, can be of either main type, depending upon its placement in the hierarchy. See below for details.

Featured section:

- Appears on the home page of its parent section
- Contains products only
- Cannot have subsections

Navigational section:

- Appears as a hyperlink in the browsing map of its parent section -- users must select the section hyperlink to view the section
- Can contain products or subsections, but not both

Leaf section:

Within these two types, a section also can be characterized as a Leaf section. Following are the Leaf section characteristics:

- The Leaf section is always the ending section or sections on a hierarchy branch, and thus never has subsections.
- The Leaf section can be a Featured or a Navigational type of section.
- The Leaf section's main purpose is for usage with Oracle iStore's Product Autoplacement feature.

Note that a Leaf section is a logical definition, and not a section attribute that you can define in Oracle iStore.

See the chapter, *Implementing Products*, page 7-1, for more details.

Section Statuses

Before a section is available to customers in the Customer Application, you must flag the section as Published and save the changes. Unpublished sections cannot be seen by customers.

- **Published Section:**
 - Section and any **published** child sections or products are visible in both the Customer Application and Site Administration Application. In the Site Administration Application, the site administrator uses Preview mode to preview a section and its child sections in the context of a specialty site.
Note: In Preview mode, only specialty sites which support the administrator's current session language will display.
 - When publishing a section, the *Apply status to all descendant sections* checkbox in the Create/Update Section page enables you to publish the current section and all descendant sections (but not products) at the same time.
- **Unpublished Section:**
 - Unpublished sections and all child sections or products are **not** visible in the Customer Application, unless being viewed by the site administrator (i.e., a user logged in with the iStore Administrator or equivalent responsibility).
 - Sections and all child sections or products (whether published or unpublished) also are viewable by the administrator through the use of Preview mode (selecting the Preview button in Site Administration Application pages).

Product Status

While working with the product catalog, you can determine whether or not to change the status of an Oracle Inventory product to Published or Unpublished. Only published products are able to display in the Customer Application, unless the site administrator is using Preview mode.

Setting a product's Published/Unpublished status in the Oracle iStore Site Administration Application is the same as changing the product's Web Status setting in Oracle Inventory.

Below are the definitions of the two Oracle iStore product statuses:

- **Published Products:** Only published products can display in the Customer Application, unless the site administrator is using Preview mode. Remember that a published product also must be: (1) listed in at least one published section, and (2) that section is in an active site accessible to a user.

- **Unpublished Products:** An unpublished product is not available in the Customer Application to end users. It will display, however, in Preview mode.

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

Understanding Section Display

Sections and their associated products display in the Customer Application in the context of the Display Templates in which they appear. All of the section templates appear in the center of the Customer Application screen. In addition to the Display Templates, section appearance is affected by the structure of your section hierarchy, any section-product associations, any content you have associated to a section or product, and any bins configured for the pages.

Section and Product Display Profile Options

Several profile options control how sections and products appear in the specialty site sections. These are discussed in this section.

Setting the Number of Home Page Tabs and Subtabs

Top-level sections of a site's root node become tabs across the top of the Site Home Page. The second-level sections become the subtabs across the top of the Site Home Page.

The number of tabs and subtabs is controlled by these profile options:

- **IBE: Number of Menu Tabs:** Specifies the number of menu tabs across the top of the Site Home Page. See the appendix, Profile Options, page A-1, for more information.

Warning: Do not set this profile option to zero (0). Setting it to zero will cause an application error in the Customer Application.

- **IBE: Number of Menu Subtabs:** Specifies the number of menu subtabs below the menu tabs on the Site Home Page. See the appendix, Profile Options, page A-1, for more information.

Setting the Number of Child Sections Per Page

The profile option, IBE: Sections Per Page for Display, allows you to set the maximum number of subsections to display on a page before the subsections fall to a new page. See the appendix, Profile Options, page A-1, for more information.

Displaying the Section Path

The profile option, IBE: Use Section Path, determines whether the section path displays in those catalog templates which can display a section path. See the appendix, Profile Options, page A-1, for more information.

Displaying Bins with Seeded Content

Three bins with seeded JSP content are controlled by profile options when using Fixed Layout for sections. These bins are:

- Browse Bin
- Global Bin
- Welcome Bin

See the chapter, Implementing Initial Customer Application Pages, page 6-1, for more information.

Displaying a Set Number of Items in Leaf Sections

The profile option, IBE: Items Per Page for Display, specifies number of items to display in Leaf sections of the hierarchy (the ending sections of a node). See the appendix, Profile Options, page A-1, for more information.

Displaying a Set Number of Items in Sections

The profile option, IBE: Items Per Section for Display, specifies the number of items to display in sections of the hierarchy that contain products. See the appendix, Profile Options, page A-1, for more information.

Displaying a Set Number of Items in Multiple-Section Template

The profile option, IBE: Lines Per Section for Multiple Section Display, specifies the number of items to display per section in Display Templates that show multiple sections. See the appendix, Profile Options, page A-1, for more information.

Section Templates Overview

The structure of your catalog sections as they display on Customer Application pages is determined by your layout and template choices for the sections. To aid your understanding of the options involved, following is a process flow for building section structure.

Process Flow for Building Section Structure

In this process, you associate each section to:

- **A Layout Template:** This choice determines whether all sections have the same bin locations (Fixed Layout) or whether each section can have separate bin locations (Configurable Layout).

and

- **A Display Template:** This choice determines which section elements (name, description, content components) display for each section and how the section looks.

Note that it is optional to configure section structure. You can always accept the default layout and default templates.

1. **Select Layout Template:** First, determine which Layout Template to use for each section. This is done in the Update Section: Layout page. The options for layout template are:

- **Fixed Layout** --- When you use Fixed Layout for a section, the section's Display Template hard-codes bin locations. All sections using the same Display Template will display any mapped bins in the same location. For more information, see the following sections within this chapter:

--"Fixed Versus Configurable Layout with Section Display Templates"

--"Using Fixed Bin Layout"

- **Configurable Layout** --- When you use Configurable Layout, bins are configurable by section, meaning that each section can have a mapped bin or bins in a different location. For more information, see:

--"Fixed Versus Configurable Layout with Section Display Templates"

--"Using Configurable Bin Layout"

See "Selecting Layout and Setting Display Templates for Sections", for steps detailing how to select Configurable or Fixed Layout and assign Display Templates to sections.

- **Custom Layout** --- Create custom Layout Templates which will display in the Layout type LOV after creation.

2. **Select Display Template:** Next, select a Display Template for the section(s). This is done in the Update Section: Template page.

Display Template options are:

- **Default Template:** Use the default Display Template for section(s). A default template exists for each section category. You can find the default templates in the section, "Section Templates", within this chapter
- **Template Gallery:** Use a template from the template gallery. You can find a list

of the templates in the section, "Section Templates".

For complete steps, see "Selecting Layout and Setting Display Templates for Sections", within this chapter.

- **Custom Templates:** Create and use customized Display Templates.
3. **Map Bins to Content:** You can implement bins on the section pages to present content along the top, bottom, right, and left of your catalog pages. If using Configurable Layout, each section can have unique bin locations. If using Fixed Layout, all mapped bins display in the same location on all section pages using the same Display Template. See the section, "Configuring Bin Placement and Content", within this chapter, for steps detailing how to map bins to content, after you have selected either Fixed or Configurable Layout in the Update Section: Layout page.

Section Templates

Within the Oracle iStore Display Templates are those that display only sections and their related information. Display Templates allow Customer UI users to see such information as section name and description, links to subsections, and content (images or HTML files).

Overview of Section Template Categories

Templates are categorized by the type of section they display. The section category is known as the *Applicable To* category of the template. The categories are:

- Section Contains Featured Subsections
- Section Contains Navigational Subsections Only
- Section Contains Products Only
- Component for Sections Containing Featured Subsections
- Component for Sections Contain Navigational Subsections Only
- Component for Sections Containing Products Only

See the sections: "Applicable To Categories for Display Templates Associated with Fixed Layout" and "Applicable To Categories for Display Templates Associated with Configurable Layout", below, for more information.

Fixed Versus Configurable Layout with Section Display Templates

For each section, you can select Fixed or a Configurable layout for Display Templates. See the section, "Process Flow for Building Section Structure", within this chapter, to

gain an understanding of the typical flow for building section structure.

The primary difference between the two layouts are:

Fixed Layout:

- With Fixed Layout, the Display Templates hard-code all bins mapped to all locations. Thus, all sections using the same Display Template will have the same bin in each location (for bins mapped to content). See the section, "Using Fixed Bin Layout", within this chapter, for information about which bins can be used with Fixed Layout.

Configurable Layout:

- Bins associated to your sections are configurable by section. The Display Template used for each section renders the center part of the page, allowing you to map different bins to the same location for different sections. Thus, all sections using the same Display Template have identical rendering only in the center portion of the catalog page, but still are able to have different bins in the same location surrounding different sections. See the section, "Using Configurable Bin Layout", within this section, for details.
- The template gallery has two additional Display Templates which can understand content components -- these are the Multilevel Subsection List with Content and Section Detail.

Note that section templates in the Fixed Layout gallery have the same look and feel as those in the Configurable Layout gallery -- the same template look and feel that is available in the Fixed Layout gallery is similarly available in the Configurable Layout gallery. Templates within Fixed and Configurable layout are different templates, but each template for Fixed Layout has a corresponding Configurable Layout template with same appearance.

Important: In the Site Administration Application, you must first select the layout type (Fixed or Configurable) and then select a template for the section.

Applicable To Categories for Display Templates Associated with Fixed Layout

Three *Applicable To* categories exist within the Display Templates associated with Fixed Layout. These are:

- **Section Contains Featured Subsections:** For a list of templates in this category, see the section, "Templates for Section Contains Featured Subsections Category", within this chapter.
- **Section Contains Navigational Subsections Only:** For a list of templates in this category, see the section, "Templates for Section Contains Navigational Subsections Only Category", within this chapter.
- **Section Contains Products Only:** For a list of templates in this category, see the

section, "Templates for Section Contains Products Only Category".

Note: For backward compatibility purposes, a fourth category exists: *Uncategorized section display templates*. This category is for templates which have been migrated during an upgrade.

Applicable To Categories for Display Templates Associated with Configurable Layout

Three *Applicable To* categories exist for Display Templates associated with Configurable Layout. These are:

- **Component for Sections Containing Featured Subsections:** All of the templates in this category have the same look and feel as those in the section, "Templates for Section Contains Featured Subsections Category" -- thus, this category does not have its own section describing each template; use the section, "Templates for Section Contains Featured Subsections Category", instead.
- **Component for Sections Containing Navigational Subsections Only:** All but one of the templates in this category have the same look and feel as those in the section, "Templates for Section Contains Navigational Subsections Only Category" -- thus, use this section for descriptions. In addition, this category has one more template, Multilevel Subsection List with Content; see the section, "Templates for Component for Sections Contain Nav. Subsec. Only Category", for details about this template.
- **Component for Sections Containing Products Only:** All but one of the templates in this category have the same look and feel as those in the section, "Templates for Section Contains Products Only Category" -- thus, use this section for template descriptions. In addition, this category has one more template, Section Detail. See the section, "Templates for Component for Sections Containing Products Only Category", for details about this template.

Templates for Section Contains Featured Subsections Category

With this category, the section itself also can have other Navigational subsections. For this type of template, the main (parent) section itself is never rendered, because when the user selects the parent section, the page flow automatically routes the user to the Featured subsection.

The following section templates are in this category:

- **Product Detail:** See the "Product Detail" section, below, for information about this template.
- **Product Multi-Select:** See the "Product Multi-Select" section, below, for information about this template.
- **Product Multi-Select with Section Links:** See the "Product Multi-Select with Section Links" section, below, for information about this template.

Product Detail

This template shows:

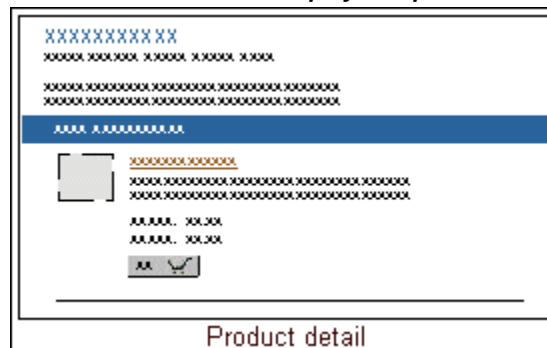
- Parent section short description
- Parent section long description
- Parent section additional information content component
- Product names
- Product small image content component
- Product descriptions

Programmatic access name --- STORE_CTLG_FSUBSCT

Default mapped JSP --- ibeCCtpFSubSct.jsp

The following graphic shows how the template appears in the gallery.

Product Detail Section Display Template



Note: This also is the default template for this category (Section Contains Featured Subsections).

Product Multi-Select

This template shows:

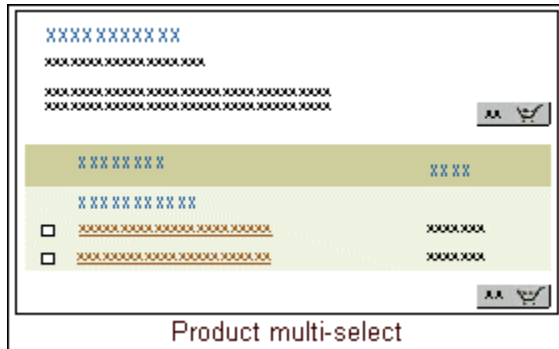
- Parent section short description
- Parent section long description
- Parent section additional information content component
- Product multi-selection option

Programmatic access name --- STORE_CTLG_FSUBSCT_MULT_2COL

Default mapped JSP --- ibeCCtpFSuStMs2.jsp

The following graphic shows how the template appears in the gallery.

Product Multi-Select Section Display Template



Note: If you use this section Display Template, you must change the seeded text message that displays. See the section, "Setting up Section Display Templates Text Messages", below, for more information.

Product Multi-Select with Section Links

This template shows:

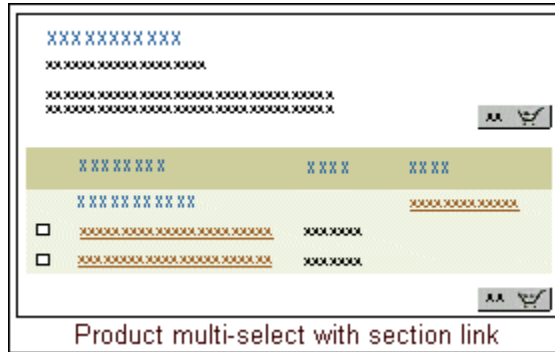
- Section short description
- Section long description
- Section additional information content component
- Product multi-selection option
- Section link

Programmatic access name --- STORE_CTLG_FSUBSCT_MULT_3COL

Default mapped JSP --- ibeCCtdFSuStMs3.jsp

The following graphic shows how the template appears in the gallery.

Product Multi-Select with Section Links Section Display Template



Note: If you use this section Display Template, you must change the seeded text message that displays. See the section, "Setting up Section Display Templates Text Messages", below, for more information.

Templates for Section Contains Navigational Subsections Only Category

The following section templates are applicable to those sections which contain Navigational subsections only:

- Subsection List
- Subsection List 2
- Multilevel Subsection List
- Subsection List with Product Detail
- Subsection List with Product Pull-Down List

These templates are described in the sections that follow.

Subsection List

This template shows:

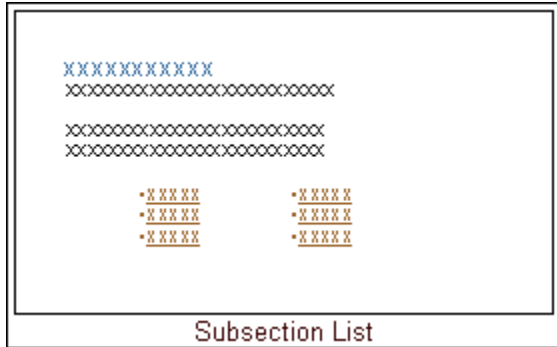
- Parent section short description
- Parent section long description
- Parent section additional information content component
- List of subsections as drill-down hyperlinks

Programmatic access name --- STORE_CTLG_SCT_BULLET_SUBSCT

Default mapped JSP --- ibeCCtpStBlSuSt.jsp

The following graphic shows how the template appears in the gallery.

Subsection List Section Display Template



Note: This is also the default section template for this category (Section Contains Navigational Subsections Only).

Subsection List 2

This template shows:

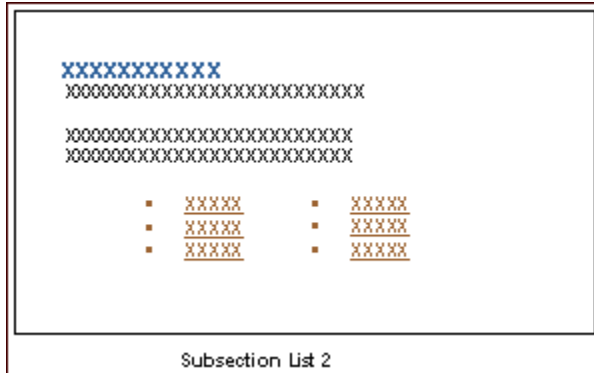
- Parent section name
- Parent section short description
- Section additional information content component
- List of subsections

Programmatic access name --- STORE_CTLG_SCTN_BULLET_SUBSCT

Default mapped JSP --- ibeCCtpStNBISuSt.jsp

The following graphic shows how the template appears in the gallery.

Subsection List 2 Section Display Template



Multilevel Subsection List

This template shows:

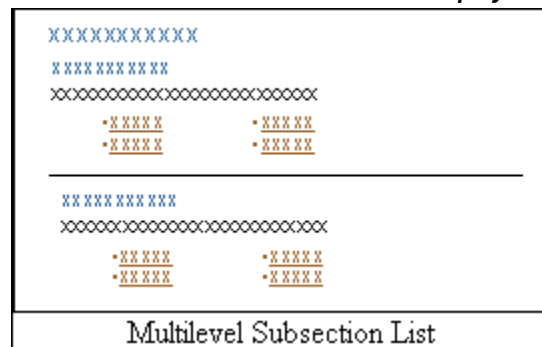
- Parent section short description
- Subsections names
- Subsections short description
- Children sections of subsections with drill-down links

Programmatic access name --- STORE_CTLG_DLDN_SCT_BULLET

Default mapped JSP --- ibeCCtpDdLfStBl.jsp

The following graphic shows how the template appears in the gallery.

Multi-Level Subsection List Section Display Template



Subsection List with Product Detail

This template shows:

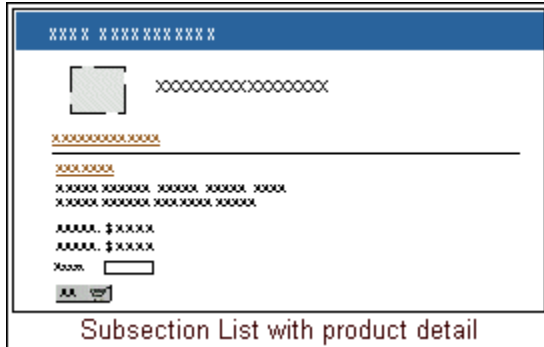
- Parent section name
- Parent section short description
- Parent section small image content component
- Subsections and their product details
- Subsection short description
- Subsection small image content component

Programmatic access name --- STORE_CTLG_DRILL_LEAF

Default mapped JSP --- ibeCCtpDrillLeaf.jsp

The following graphic shows how the template appears in the gallery.

Subsection List with Product Detail Section Display Template



Subsection List with Product Pull-Down List

This template shows:

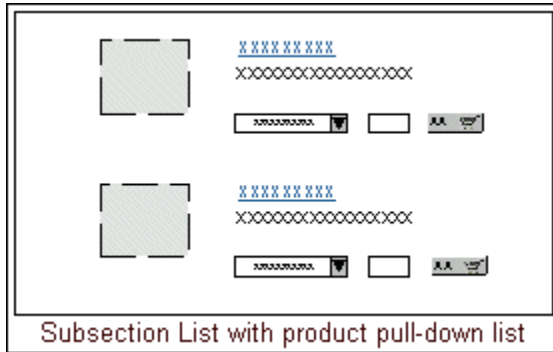
- Subsection names
- Subsection short descriptions
- Subsection images mapped to section small image content component
- Product pull-down list

Programmatic access name --- STORE_CTLG_SUBSCT_DPDN_ITEMS

Default mapped JSP --- ibeCCtpChStDdIts.jsp

The following graphic shows how the template appears in the gallery.

Subsection List with Product Pull-Down Section Display Template



Templates for Section Contains Products Only Category

The following section templates are applicable to those sections which contain only products:

- Product Detail
- Product Pull-Down
- Product Detail Multi-Select
- Product Multi-Select
- Product Multi-Select with Drill-Down

These templates are described in the sections that follow.

Product Detail

This template shows:

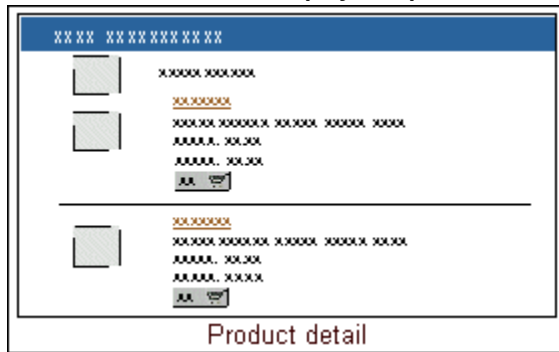
- Section name
- Section short description
- Section small image content component
- Product names
- Product small image content component
- Product descriptions

Programmatic access name --- STORE_CTLG_LEAF_SCT_SINGLE

Default mapped JSP --- ibeCCtpLeafSctSs.jsp

The following graphic shows how the template appears in the gallery.

Product Detail Section Display Template



Note: This is also the default section template for this category (Section Contains Products Only).

Product Pull-Down

This template shows:

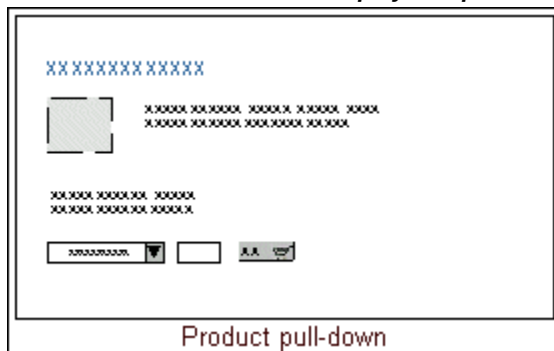
- Section name
- Section long description
- Section small image content component
- Section additional information content component
- Product pull-down list

Programmatic access name --- STORE_CTLG_SCT_DTL_DPDN_ITEMS

Default mapped JSP --- ibeCCtpStMmDtIts.jsp

The following graphic shows how the template appears in the gallery.

Product Pull-Down Section Display Template



Product Detail Multi-Select

This template shows:

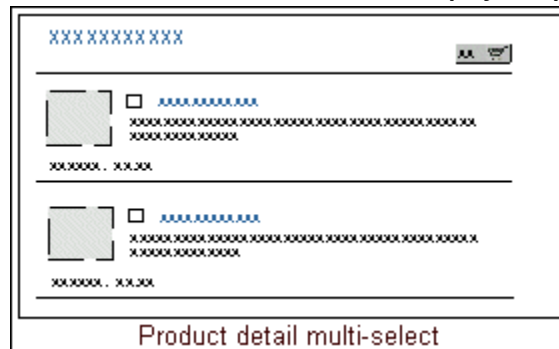
- Section short description
- Products multi-select option
- Product names
- Product small image content component
- Product descriptions

Programmatic access name --- STORE_CTLG_LEAF_SCT_ITEMS

Default mapped JSP --- ibeCCtpLfStIts.jsp

The following graphic shows how the template appears in the gallery.

Product Detail Multi-Select Section Display Template



Product Multi-Select

This template shows:

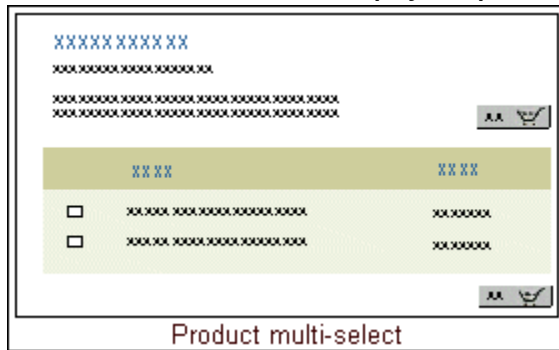
- Section short description
- Section long description
- Section additional information content component
- Products multi-select option

Programmatic access name --- STORE_CTLG_LF_SCT_MULT_NOLINKS

Default mapped JSP --- ibeCCtpLfStMs.jsp

The following graphic shows how the template appears in the gallery.

Product Multi-Select Section Display Template



Product Multi-Select with Drill-Down

This template shows:

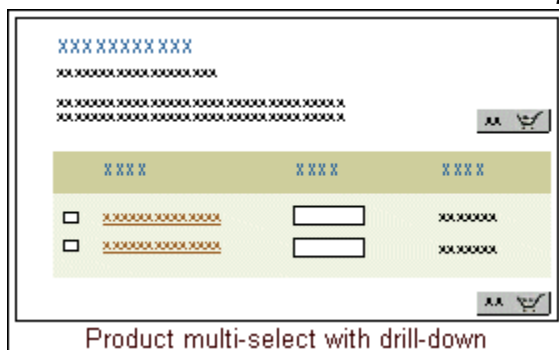
- Section short description
- Section long description
- Section additional information content component
- Products multi-select option
- Links to product detail pages

Programmatic access name --- STORE_CTLG_LEAF_SCT_MULTIPLE

Default mapped JSP --- ibeCCtpLfStMsL.jsp

The following graphic shows how the template appears in the gallery.

Product Multi-Select with Drill-Down Section Display Template



Templates for Component for Sections Contain Nav. Subsec. Only Category

Within the configurable layout option, the following section templates are applicable to those sections which contain Navigational subsections:

- **Multilevel Subsection List with Content:** This template is available for configurable layout only; see the section, "Multilevel Subsection List with Content", below, for more information.
- **Subsection List:** This template also is available for fixed layout; see the section, "Subsection List", below, for more information.
- **Subsection List 2:** This template also is available for fixed layout; see the section, "Subsection List 2", below, for more information.
- **Multilevel Subsection List:** This template also is available for fixed layout; see the section, "Multilevel Subsection List", below, for more information.
- **Subsection List with Product Pull-Down List:** This template also is available for fixed layout; see the section, "Subsection List with Product Pull-Down List", below, for more information
- **Subsection List with Product Detail:** This template also is available for fixed layout; see the section, "Subsection List with Product Detail", below, for more information.

Multilevel Subsection List with Content

This template is specifically designed to show subsections within a section, along with content mapped to content components at the section level. This template shows:

- Subsection name
- Subsection image -- This is the image mapped to Section Small Image content component at the section level.
- Subsection short description
- Subsection additional information -- This is HTML content mapped at the section level to the Section Additional Information content component.
- Subsubsection names -- All child sections within the subsection will display in column format; sub-subsection names are drill-down hyperlinks.
- Content items mapped to sub-subsections -- A list of content items (as defined by any of the content components Section Additional Information 1 through 5 mapped to the child section) display under the subsubsection name; content item names are

drill-down hyperlinks.

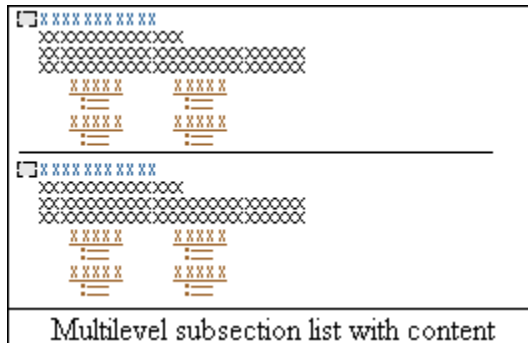
- Detail areas showing subsection names and additional information mapped to the subsection

Programmatic access name --- STORE_SECT_MULTILEVEL_SUBSECT_INCL

Default mapped JSP --- ibeCCtdStMlSubStI.jsp

The following graphic shows how the template appears in the gallery.

Multilevel Subsection List with Content Section Display Template



Templates for Component for Sections Containing Products Only Category

Within the Configurable Layout option, the following section templates are applicable to those sections which contain only products:

- **Product Detail:** This template also is available for Fixed Layout; see the section, "Product Detail", below, for more information.
- **Product Pull-Down:** This template also is available for Fixed Layout; see the section, "Product Pull-Down", below, for more information.
- **Product Detail Multi-Select:** This template also is available for Fixed Layout; see the section, "Product Detail Multi-Select", below, for more information.
- **Product Multi-Select:** This template also is available for Fixed Layout; see the section, "Product Multi-Select", below, for more information.
- **Product Multi-Select with Drill-Down:** This template also is available for Fixed Layout; see the section, "Product Multi-Select with Drill-Down", below, for more information.
- **Section Detail:** This template is only available for Configurable Layout; see the section, "Section Detail", below, for more information.

Section Detail

This template is specifically designed to show section details, along with content mapped to content components at the section level. This template shows:

- Section name
- Section image -- This is the image mapped to Section Small Image content component at the section level.
- Section short description
- Subsection additional information -- This is HTML content mapped at the section level to the Section Additional Information content component.
- Content items mapped to sub-subsections -- A list of content items (as defined by any of the content components Section Additional Information 1 through 5 mapped to the child section) display under the subsection name; content item names are drill-down hyperlinks.
- Detail areas showing sub-subsection names and additional information mapped to the sub-subsection

Programmatic access name --- STORE_SECT_DETAIL_INCL

Default mapped JSP --- ibeCCtdStDetI.jsp

The following graphic shows how the template appears in the gallery.

Section Detail Section Display Template



Product Templates

Within the Oracle iStore Display Templates are those that display products. Of course, since products only appear within the context of a section, the overall structure around the product display is affected by the section Display Templates.

This section lists the seeded templates for products:

- Product Additional Information
- Product Basic Information
- Product Basic Information with Image
- Product Detail with Image
- Product Detail without Image
- Product Detail with Services

These templates are described in the sections that follow.

For information on how to assign templates, see the "Setting Display Templates for Products", below.

Product Additional Information

Use this template to display Featured products in a Featured section.

Programmatic access name --- STORE_CTLG_ITEM_INFO

Default mapped JSP --- ibeCCtdItemInfo.jsp

Note: This is a migrated Display Template which appears in the Custom Display Template LOV in the Template Gallery of the Products, Display Template page. No image of this template displays in the Template Gallery.

Product Basic Information

This template shows:

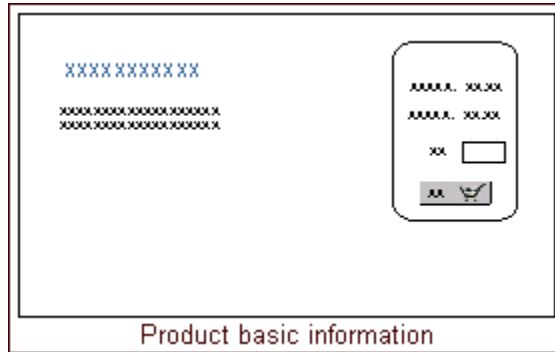
- Product name
- Product description
- Add to Cart bin

Programmatic access name --- STORE_CTLG_ITEM_DESC

Default mapped JSP --- ibeCCtdItemDesc.jsp

The following graphic shows how the template appears in the gallery.

Product Basic Information Display Template



Product Basic Information with Image

This template shows:

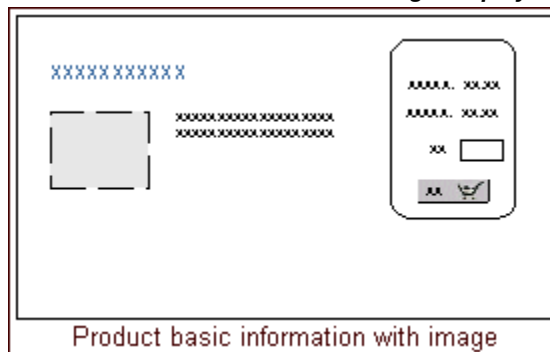
- Product name
- Product description
- Product large image content component
- Add to Cart bin

Programmatic access name --- STORE_CTLG_ITEM_DESC_AND_IMG

Default mapped JSP --- ibeCCtdItemDescImg.jsp

The following graphic shows how the template appears in the gallery.

Product Basic Information with Image Display Template



Product Detail with Image

This template shows:

- Product name
- Product description
- Product large image content component
- Product additional information content component
- Add to Cart bin
- Product descriptive flexfields
- Related products

Programmatic access name --- STORE_CTLG_ITEM_DETAILS

Default mapped JSP --- ibeCCtdItemDetail.jsp

Note: This also is the default Display Template for products.

The following graphic shows how the template appears in the gallery.

Product Detail with Image Display Template



Product Detail without Image

This template shows:

- Product name
- Product description
- Product additional information content component
- Add to Cart bin
- Product descriptive flexfields

- Related products

Programmatic access name --- STORE_CTLG_ITEM_DETAILS_NO_IMG

Default mapped JSP --- ibeCCtdItemDtlNoImg.jsp

The following graphic shows how the template appears in the gallery.

Product Detail without Image Display Template



Product Detail with Services

This template is specifically designed to display service items. This template shows:

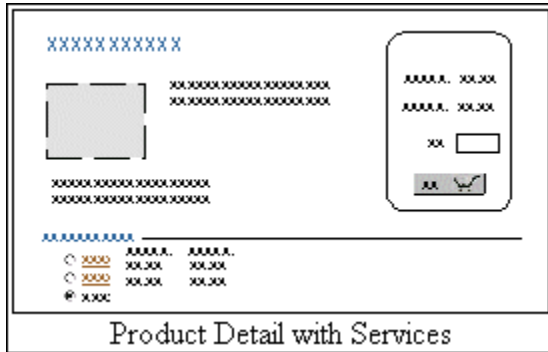
- Product name
- Product description
- Product large image content component
- Product additional information content component
- Add to Cart bin
- Descriptive flexfields
- A "Services" area listing:
 - Services associated to the serviceable product as mutually exclusive radio buttons (default selection is "None")
 - Prices for each of the services, including "List/Retail Price" and "Your Price" support

Programmatic access name --- STORE_CTLG_SVA_SVC_LIST

Default mapped JSP --- ibeCCndSvaSvcList.jsp

The following graphic shows how the template appears in the gallery.

Product Detail with Services



Creating and Maintaining Sections

This section contains information on section creation and maintenance.

See the section, "Configuring Bin Placement and Content", within this chapter, for information on how you can implement bins to surround your section Display Templates with additional JSPs and content.

Note: All of the steps in this section assume you will log in to the Oracle iStore Site Administration Application as the iStore administrator.

For product maintenance tasks in the context of sections, see the section, "Maintaining Products in Sections", within this chapter.

Note on Categories page within the Section pages: The Categories page within the Sections menu is used for Oracle iStore's Product Autoplace functionality only. See the chapter, Implementing Products, page 7-1, for more information.

Creating Sections

Using the Sections pages within the Site Administration Application Catalog tab, you can create as many sections as you wish. In the Sections summary page, Catalog Hierarchy, you can use the Focus icon located next to section names to focus in on and work with a particular section or a section and its children.

To create a section, log in to the Site Administration Application and select Catalog, then Sections , then Create Section icon (in the Sections column).

Create Section Icon



Guidelines

The following guidelines can assist you when creating sections:

- Remember, only sections which have no products (Navigational sections) can contain subsections.
- When you select the Create Section icon, the section in the row you selected will be the parent section for the section you are creating.
- If you select a section containing products, you will get an error message saying that the section already contains products and that you cannot add subsections under this section. Sections can only contain subsections or products. You should use featured subsections to have sections and products at the same level.
- Section Name field -- This name will appear in the Customer Application.
- Section Code field -- Currently, section code is used only for your internal business purposes. Some of the section search screens allow you to search on this field. In addition, this code may be useful if you intend to customize iStore templates. For example, you could specify a section code to use as a name for the section in a customized JSP. The code in this custom template could then refer to the section and access its information directly by using its section code.
- Short Description field -- This text will display in the Customer Application underneath the section name, if being used by a template which can display this information.
- Long Description field -- This text will display in the Customer Application underneath the section short description, if being used by a template which can display this information.
- Keywords field -- After you enter them in the system, you can search by keywords using the search utility. Separate multiple keywords with commas.
- Parent Section field -- When creating sections, this field will default to the parent section chosen in the Catalog Hierarchy page. To assign a new parent section, use the flashlight icon to launch the Search and Select: Catalog Sections page
- Search and Select: Catalog Sections page -- This page lists sections alphabetically by name. Sections of both published and unpublished statuses will display in this page. Featured sections and Navigational sections with products will not display, as these types of sections cannot have subsections.
- Apply status to all descendant sections checkbox -- Select this checkbox to have all descendent sections of this section use the same published/unpublished status. Deselect to allow each descendant section to have its own status values defined.

- **Start Date:** Specify the start date for the catalog section. The system date is the default start date for the section. You can select the desired date using the Calendar icon or enter a date value.
- **End Date:** Specify the end date for the catalog section. You can select the desired date using the Calendar icon or enter a date value.
- **Enable Product Comparisons check box:** The Oracle iStore Administrator selects the Enable Product Comparisons check box while creating iStore Catalog sections to enable product comparison. If the Enable Product Comparisons check box is selected, then all iStore users accessing the catalog section can compare products.

Deleting Sections

You can delete a section at any time by selecting the section in the Catalog Hierarchy page and then pressing the Delete button. When you delete a section, all children (subsections or products) are removed.

Note: You cannot delete a section from the section hierarchy if that section or its child sections are being used as a root section for a site.

Duplicating Sections

The Catalog Hierarchy page within the Sections menu features the ability to duplicate any existing section or subsection.

To duplicate a section, log in to the Site Administration UI and select Catalog, then Sections; select a section and press Duplicate.

Important: If you try to duplicate a section that has more than 1,000 subsections as children, Oracle iStore does not complete the process and displays an error message. If you have more than 1,000 subsections, use the iStore Duplicate Section concurrent program. After running this concurrent program, you can then run the iStore Section Layout Mapping program to copy the content mapping of the newly duplicated section to all of its child sections. See the "iStore Duplicate Section Concurrent Program" and "iStore Section Layout Mapping Concurrent Program" sections, below, for more details.

Guidelines

- When you duplicate a section, all data associated with the original section -- including parameters, children (subsections or products), templates, site assignments, and content -- are copied to the new section.
- If the original section from which the copy was made is deleted, Oracle iStore can

still access the products, content items, and templates data.

- **New Section Name field:** While functionally the name for the new section need not be unique, as a best practice, it is recommended that you do not use identical names for your sections.
- **Parent Section field:** If you do not select a new parent, the original section's parent section will be the parent section.
- **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.

iStore Duplicate Section Concurrent Program

Use this program to copy a section which has a large number (e.g., more than 1,000) children sections. Following are the parameters:

- **Duplicate Source Section:** This LOV displays all sections in your implementation, along with their section codes (if any) and parent section name. From the list, select the section to be copied.
- **New Parent Section:** This LOV displays all sections in your implementation, along with their section codes (if any) and parent section name. From the list, select the desired parent section for the copied section.
- **New Section Name:** Enter a name for the newly copied section.

Remember to submit the request after entering parameters.

iStore Section Layout Mapping Concurrent Program

The iStore Section Layout Mapping concurrent program lets you copy all of the layout mappings (bins) from a Configurable Layout parent section to its children. To run this program, in the Section Name field, enter the name of the section whose layout bins content will be mapped to the child sections.

Additional Information: This concurrent program only works with sections using Configurable Layout.

Remember to submit the request after entering parameters.

Example

Cascade Section Layout Mapping to Children Example

Section A has multiple bins mapped using Configurable Bin Layout. You wish to copy these bin mappings to all of its child sections. Log into Oracle Forms and run the iStore Section Layout Mapping concurrent program, choosing the parent section in the Section Name field. After the concurrent program is run, all of the bins mapped to the parent

section will be mapped to the children sections.

Adding Products to Sections Using the Sections Pages

Within the Site Administration Application Catalog tab, you can add products to a section either through the Sections pages or through the Products pages. This section contains information about adding products to sections in the Sections pages. For instructions on how to assign sections to a single product using the Products pages, see the section, "Adding Products to Sections Using the Products Pages".

You also can use Oracle iStore's Product Autoplacement feature to automatically add products to leaf sections; see the chapter, *Implementing Products*, page 7-1, for details.

To add one or several products at once to a single section, log in to the Site Administration Application and select Catalog, then Sections > (select section), then Update, then Add Products icon.

Add Products Icon



Guidelines

- To add products to a section, the section to which products are being added cannot have subsections.
- If you attempt to add products to ineligible sections, an error message displays saying that the section already contains subsection(s) and that you cannot add products under this section. Sections can only contain subsections or products. You should use featured subsections to have sections and products at the same level.
- For configured items, including telecommunications service ordering items, you may wish to utilize the Usage field to assign a usage to a product. Note that only configurable products (set up through Oracle Configurator) will display the Usage field. Refer to the *Oracle Telecommunications Service Ordering Process Guide* for more information.
- Product Number relates to Item field in Oracle Inventory forms.
- Product Name relates to Description field in Oracle Inventory forms.
- The Start Date field will automatically set to system date. If you change this value, the date is stored in iStore schema; it indicates the start date for the association of section and product. It is not the product creation date in Oracle Inventory.

Assigning Sections to Sites

A section must be assigned to a site in order to display in the Customer Application.

To assign a section to a site, log in to the Site Administration Application and select Catalog, then Sections (select section), then Update, then the Sites hyperlink.

Guidelines

- By default, when you create a section, it will be included in the sites that its parent section is included in. However, you can choose which sites the section should apply to.
- When you navigate to the Site, Update page to associate a catalog root section, all the site-section associations are rebuilt in the database, and the old associations are cleaned up.
- 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.
- If the selected site has a parent section, only the sites to which this parent section belongs are candidates for inclusion. To include the section in other sites not in the list (sites to which the parent doesn't belong), you must change the parent section's site assignments or change the parent section assignment for this section.
- Include this section in all future sites whose root section is an ancestor of this section checkbox - Selecting this will make this section automatically included in other sites that you create whose root section is an ancestor of this section.
- Remember that each site is linked to a single parent section. If you wish a specialty site's top level navigation to be driven from a specific section, you must select that section as the Catalog Root Section in the Update Site: Details page. See the section, "Create a Site: Getting Started and Entering Basic Information", within the chapter, Implementing Site Management, page 5-1, for more information.

Adding Content to Sections

You can use Oracle iStore's content components and media object functionality --- in combination with your own content source files --- to add content to sections. See the chapter, Implementing Content, page 10-1, to learn the basics of how Oracle iStore can display content in your specialty sites.

To add content to a section, log in to the Site Administration Application and select Catalog, then Sections (select section), then Update, then the Content hyperlink.

Guidelines

- The Update Section: Content page lists existing (seeded and non-seeded) content components that can be used for sections. Content components names appear in the Select Media area. See the chapter, *Implementing Content*, page 10-1, for a list and descriptions of seeded content components.
- If you use a non-seeded content component, you must modify the Display Template to use the new content component. See the section, "Advanced Content Tasks", in the chapter, *Advanced Display*, page 36-1, for more information.
- In the Search and Select: Media Object page, search for and then select a media object. To select a media object, activate the radio button of the object and press the Select button.
- For more information about media objects classes, see the chapter, *Implementing Content*, page 10-1. For a list of the seeded media objects, see the appendix, *Seeded Display Data*, page C-1.
- You also can create a new media object in the Update Section, Content screen by selecting the Create Media Object icon and entering the new object information
- Also in the Update Section, Content screen, you can show the site/language mappings for the content and add more content items by selecting the Show Details hyperlink. In Show mode, you can:
 - Select View Mapping to view any site/language mappings for the content associated to the media object, in the Media Object Details page. If no site/language mappings exist, then this button is de-active. A content file must be mapped to the media object before site/language mappings can be established.
 - Select Add Content to add a content item to the media object in the Update Section: Add Content page. If no media object has been selected, then this button is de-active.
- Remember, you must map a content source file to the media object. You can do this from the Update Section, Content page (select Add Content button). You also can map content from the Content, Media Objects pages.

Selecting Layout and Setting Display Templates for Sections

Display Templates control the appearance of your site sections, and each section can have its own Display Template mapping.

To set the Display Template for a section, log in to the Site Administration Application and Select Catalog, then Sections (select section), then Update, then the Templates

hyperlink. Within section templates functionality, you have the choice of using either Fixed or Configurable layout -- first you choose the layout type, then select a template from the gallery available within each layout type.

Guidelines

- See the sections, "Process Flow for Building Section Structure" and "Fixed Versus Configurable Layout with Section Display Templates", for more information. When using Configurable Layout, you also can set bins to display for the section you're updating - see the section, "Using Configurable Bin Layout".
- Though Oracle iStore does allow switching from Configurable to Fixed layout after components have been mapped, it not advisable to do so.
- Two sub-pages are included within the Templates link: Layout and Display Template. After you select the layout type, you then use the Display Template link to select a Display Template that fits the *Applicable To* category of the section you are updating.
- Optionally, you can map a custom Display Template for a section. Any custom Display Templates that you have created will display in the Custom Display Template LOV. Previously migrated templates also will display in this LOV. In the case of fixed layout, the custom display template can be one that customizes not only the central part of the layout but also the page layout.

Setting the Display Order of Section Descendants

You can set the display order of a section's descendant sections -- whether subsections or products. This allows you to re-arrange the order of subsections or products in the Customer Application without customization.

To set the display order for a section or product, log in to the Site Administration Application and select Catalog, then Sections (select section), then Update, then the Display Order hyperlink.

Guidelines

- The Display Order pages change depending on which type of children a section has. 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. If the section has products only, then the products will display in the re-order window, and the Advanced SQL option is available.
- You cannot enable the reordering of both products and sections simultaneously.
- The option: *Or use the reordering shuttle table below* will be the only option available if the section's descendants are subsections and not products.

- Advanced users can use an SQL statement to order the products in the UI as well. See the section below for details.

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.

To re-order a section's descendants using an SQL clause, log in to the Site Administration Application. Select Catalog, then Sections (select section) , then Update, then the Display Order hyperlink.

Guidelines

- Ensure that radio button is enabled for the option: *Advanced SQL*. Note that this option will not be available if the section's descendants are subsections and not products.
- The SQL order by clause is used at runtime by the Customer Application, allowing the products to be displayed within the section template that you specify.
- The SQL script can only contain subsets of the column attributes of the MTL_SYSTEM_ITEMS_B and MTL_SYSTEM_ITEMS_TL tables.
- The order by clause must contain a list of columns with the sorting order, ascending or descending, for each column. The syntax is as follows: "COLUMN1 [ASC | DESC], COLUMN2 [ASC | DESC], ..." Other syntaxes are not supported and will generate an error message in the specialty site.

Example -- A Section's Order By Clause

The following order by clause sorts items by creation date in descending order and description in ascending order: CREATION_DATE DESC, DESCRIPTION ASC

Using the Section Search Utility

Using the section search utility, you can perform Simple or Advanced searches of the section hierarchy.

To use section search, log in to the Site Administration Application. Select Catalog, then Sections. Select the Advanced button for advanced search.

Guidelines

- Keywords field -- These are keywords you have entered and saved.
- Status field -- Enter Published or Unpublished.

- In the search textbox, enter all or partial values. The search utility is case-insensitive. You may use % symbol as a wildcard if desired.

Maintaining Products in Sections

This section contains information on maintaining products within the section hierarchy. This section assume you will log in to the Oracle iStore Site Administration Application as the iStore Administrator.

Product implementation and limited maintenance information can be found in the chapter, Implementing Products, page 7-1.

Optional integration with Oracle Marketing can provide enhanced product functionality. See the chapter, Integrating Oracle iStore with Oracle Marketing, page 26-1, for details.

Previewing Products

Oracle iStore's Preview mode allows site administrators to preview products in the context of the specialty site(s) that include the products. Typically, Preview mode is accomplished by pressing the Preview button on applicable screens in the Site Administration Application.

All products -- whether of published or unpublished status --- will display in Preview mode. You cannot perform any transactions while in Preview mode.

Note: In Preview mode, only specialty sites which support the administrator's current session language will display. Also, Preview mode is not supported when accessing the Customer Application through Oracle Application Server Web Cache. See the chapter, Verifying the Implementation, page 19-1, for more information.

Updating Product Details

In the Site Administration Application, you can update a product's basic information and set the Web Status (Published/Unpublished) flag.

To update a product, log into the Site Administration Application and select Catalog, then Products (select product), then Update.

Adding Products to Sections Using the Products Pages

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

To add a product to section(s), log in to the Site Administration Application and select Catalog, then Products, (select product), then Update, then the Sections hyperlink.

Guidelines

- In the Search and Select: Catalog Sections page, only those sections who are candidates for product assignment will display.
- For configured items, including telecommunications service ordering items, you may wish to utilize the Usage field to assign a usage to a product. Refer to the *Oracle Telecommunications Service Ordering Process Guide* for more information.

Including or Excluding Products from Sites

By default, products are included in all sites which their parent section belongs to. However, you can exclude or include a product in specific site(s).

To include/exclude products from sites, log in to the Site Administration Application. Select Catalog, then Products, then the Sites hyperlink.

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.

Setting Content at the Product Level

Just as you can with sections, you can add content to a product template using Oracle iStore's content component and media object functionality. Content mapped at the product level overrides all other mappings.

See the chapter, Implementing Content, page 10-1, for more information on content concepts.

To add content at the product level, log in to the Site Administration Application and select Catalog, then Products (select product), then Update, then the Content hyperlink.

Guidelines

When adding content to products, the same basic guidelines that apply to section content apply as well. See the section, "Adding Content to Sections", within this chapter, for more information.

For the types of templates that can display product information, see the section, "Product Templates", within this chapter.

Setting Display Templates for Products

Just as with sections, you can assign Display Templates to products to determine the layout and display elements surrounding the product.

To assign a Display Template to a product, log in to the Site Administration UI and select Catalog > Products > (update product) > Display Template hyperlink.

Searching for Products

Site administrators must search for products before they display in the Products Summary page. Both Simple and Advanced product searches are available.

To Log into the Site Administration Application and select Catalog, then Products.

Guidelines

- The product database in the Site Administration Application is based on products within the Inventory Organization that matches the value of the profile option, IBE: Item Validation Organization, and from categories within the default category set, specified by the profile option, IBE: Category Set.
- You can enter partial values and perform a search without using a wildcard, and the system will append the value you enter with a wildcard. Or you may use the percent sign (%) as a wildcard if desired, and the system will append another wildcard.
- The search textbox is case insensitive.
- If the search textbox is left blank and the Go button is selected, a search for all values will be performed.

Configuring Bin Placement and Content

The Oracle iStore Customer Application 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, bottom, and in some cases, middle page area). Some of the bins by default are mapped to supplied 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.

Bins Overview

Page types that have bins include:

- Section display pages (See "Section Page Bins", below)
- Item (product) detail display pages (See "Item Detail Page Bins", below)
- Shopping cart display page (See "Shopping Cart Page Bins", below)
- User registration display pages (See "Registration Page Bins", below)

- Site Selection Page (See the chapter, Implementing Initial Customer Application Pages, page 6-1)

For a complete list of supplied bins, see the appendix, Seeded Display Data, page C-1.

All bins are separate logical Display 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 (the JSP file).

Other Guidelines

Keep the following additional guidelines in mind:

- The bin template, functioning as a placeholder, determines the size of the bin. The content (or JSP file), when mapped to the template, conforms (or attempts to conform) to the template size. Therefore, be sure to map JSP files to templates designed to match size of bin that the template displays. For example, you would not wish to map the seeded Welcome Bin JSP (ibeCAcdWelcome.jsp), which is meant to display in a single column, to a top or bottom page bin Display Template, since these templates are designed to span multiple columns.
- Content must be mapped to the bin for it to display properly. See the section, "Mapping Source Files to Display Templates", within this chapter, for steps.
- 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.

Configurable and Fixed Layout Available

Section page bins can be configured in two ways -- using Fixed Layout, where every catalog section page using the same Display Template shows the mapped bins in the same location on every page, or using Configurable Layout, where bins can be placed on the page of a specific section and in a specific location.

See the following topics within this section for more information:

- "Summary of Options for Changing Bin Placement and Content"
- "Using Fixed Bin Layout"
- "Using Configurable Bin Layout"

Summary of Options for Changing Bin Placement and Content

You can change bin placement or content in the following ways:

- **Profile Options:** Change the profile options related to the catalog bins. Several

profile options are supplied which alter the appearance and placement of sections and items. Note that section profile options control bins only when using Fixed Bin Layout. See the appendix, Profile Options, page A-1, for a list of these profile options.

- **Fixed Bin Layout:** Use bin Fixed Layout functionality, and associate your own JSPs with the seeded logical bin templates. See the section, "Using Fixed Bin Layout", within this chapter, for details.

Note: Several bins are seeded for the Site Home Page. For information on Site Home Page configuration options, see the "Implementing Initial Customer Application Pages" chapter.

- **Configurable Section Bin Layout:** - Use Configurable Layout for section bins, and associate targeted bin content to specific sections. This functionality is especially useful if using sites integrated with Oracle iSupport and/or Oracle Partner Management.

Note: Configurable Layout for bins is only available for the section pages -- not for shopping cart, product detail, or registration page bins. See: the section, "Using Configurable Bin Layout", within this chapter. When you use Configurable Layout for bins, you automatically will be choosing from a slightly different section Display Template gallery -- see section, "Fixed Versus Configurable Layout with Section Display Templates", within this chapter, for information.

Using Fixed Bin Layout

With Fixed Layout, all sections using the same Display Template share the same bin layout. For example, if you map the section bin, STORE_CTLG_BIN_LEFT_1 template, to a JSP, then all section pages using the same template show the mapping for this bin in the same location. Of course, you can map different JSPs to site-language combinations to vary the content by site and language.

Section Page Bins

In addition to the seeded Browse Bin, Global Bin, Welcome Bin (which have seeded content and display automatically), the section pages contain seven bins to the right and seven bins to the left of the center display page, as well as a top bin and a bottom bin. These bins do not have seeded content.

Following is a summary of the section bin layout:

- **Left bins:** The following seven bins display to the left of the center display page, if mapped to source files: STORE_CTLG_BIN_LEFT_1 through STORE_CTLG_BIN_LEFT_7.
- **Right bins:** The following seven bins displaying to the right of the center display page, if mapped to source files: STORE_CTLG_BIN_RIGHT_1 through

STORE_CTLG_BIN_RIGHT_7.

- **Top bin:** Following is the name of the top section bin template, which displays across the top of the section pages -- STORE_CTLG_SECTION_BIN_TOP.
- **Bottom bin:** Following is the name of the bottom section bin template, which displays across the bottom of the section pages -- STORE_CTLG_SECTION_BIN_BOTTOM.

The section bins with seeded content can be turned on or off through profile options, when using fixed section layout.

To copy bin mappings from a parent section to all of the children of the section, use the iStore Section Layout Mapping concurrent program, page 9-35.

Item Detail Page Bins

Item bins display along the sides, top, and bottom of the web page when a user views an item detail template. All seeded item bin templates share the same layout. You can customize the common item layout through profile option settings and template setup (in addition to this section, see the sections, "Section and Product Display Profile Options", and "Product Templates"). None of the item bins has a seeded JSP mapped.

Following is a summary of the item bins:

- **Left bins:** The following seven bins display by default along the left side of the item detail display page: STORE_CTLG_ITEM_BIN_LEFT_1 through STORE_CTLG_ITEM_BIN_LEFT_7.
- **Right bins:** The following seven bins display by default along the right side of the item detail display page: STORE_CTLG_ITEM_BIN_RIGHT_1 through STORE_CTLG_ITEM_BIN_RIGHT_7.
- **Top bin:** STORE_CTLG_ITEM_BIN_TOP displays above the item detail display page.
- **Bottom bin:** STORE_CTLG_ITEM_BIN_BOTTOM displays below the item detail display page.

Shopping Cart Page Bins

The Shopping Cart page contains bins which you can customize. None of the cart bins has a seeded JSP mapped.

Following is a summary of the shopping cart page bins:

- **Left bins:** The following seven bins display by default along the left side of the shopping cart display page: STORE_CART_BIN_LEFT_1 through STORE_CART_BIN_LEFT_7.

- **Right bins:** The following seven bins display by default along the right side of the shopping cart display page: STORE_CART_BIN_RIGHT_1 through STORE_CART_BIN_RIGHT_7.
- **Top bin:** STORE_CART_ITEMS_BIN_TOP displays above the cart display page.
- **Bottom bin:** STORE_CART_ITEMS_BIN_BOTTOM displays below the cart display page.

Registration Page Bins

The New User Registration page (ibeCRgdRegContainer.jsp) and subsequent registration information pages contain bins which you can customize. None of the registration page bins has a seeded JSP mapped.

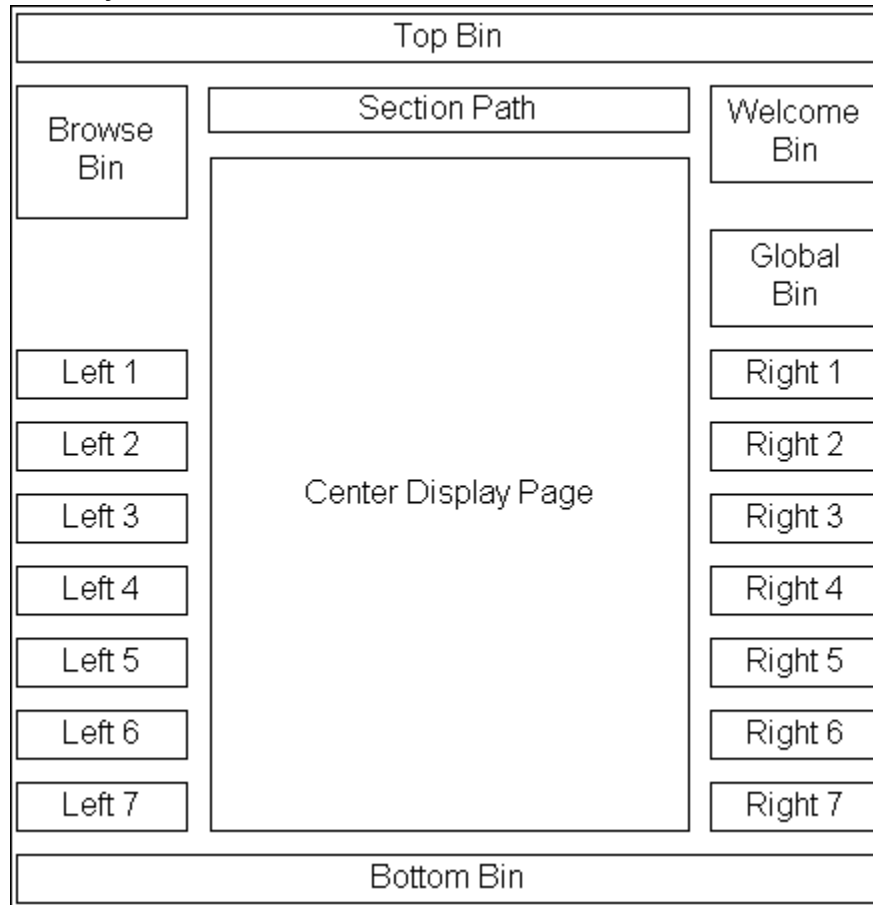
Following is a summary of the registration page bins:

- **Left bins:** The following three bins display by default along the left side of the registration display pages: STORE_REG_LEFT1_D through STORE_REG_LEFT3_D.
- **Right bins:** The following three bins display by default along the right side of the registration display pages: STORE_REG_RIGHT1_D through STORE_REG_RIGHT3_D.
- **Top bin:** STORE_REG_TOP_D displays above the registration display pages.
- **Bottom bin:** STORE_REG_BOTTOM_D displays below the registration display pages.

Fixed Layout Bin Locations

The following graphic shows the default location for the Fixed Layout bin locations.

Fixed Layout Bin Locations



Using Configurable Bin Layout

Oracle iStore's Configurable Layout functionality allows you to display targeted bin content in different sections. See also: "Fixed Versus Configurable Layout with Section Display Templates" within this chapter.

Configurable Bin Layout Benefits and Behavior

The following points describe Configurable Layout benefits and behavior:

- For Oracle iSupport and Oracle Partner Management applications integrating with Oracle iStore's site management, this functionality allows implementers to map Partner Management-specific section page bins to Partner Management content, and support-specific section page bins to Oracle iSupport content.
- When you use configurable section layout you map layout components to seeded or custom templates. The templates that you map to the layout components must be

linked to source JSP files, and their site-language mappings must be established.

- The Configurable Layout for bins feature provides additional customization abilities that allow you to provide your own templates and link them to sections through layout components. This cannot be done using Fixed Layout; with Fixed Layout, you must change the JSP mapping for hard-coded bins.
- Only bin templates within the Components for Section category are candidates for use with this functionality.
- If you create custom bin templates for use in Configurable Layout, be sure to save them to the Components for Section category.

Remember, you can associate a Display Template to a section only through the Display Template gallery.

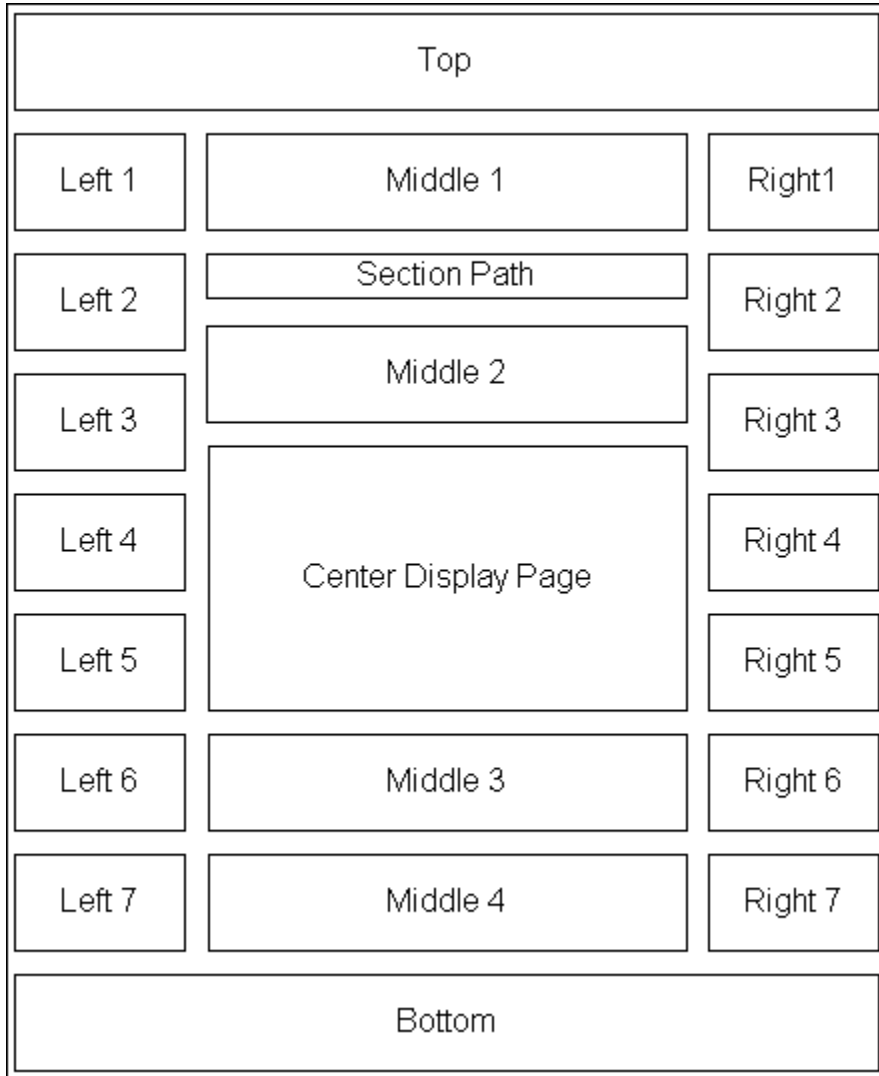
Layout Components for Configurable Bin Layout

Following are the layout components available in Configurable Layout:

- **Left components:** Seven layout components are available for display to the left of the section display page. In the layout component mapping pages, these are known as Left 1 through Left 7 layout components.
- **Right components:** Seven layout components are available for display to the right of the section display page. In the layout component mapping pages, these are known as Right 1 through Right 7 layout components.
- **Middle components:** Four middle bins are available as layout components. In the section template setup pages, these are known as Middle 1 through Middle 4. Middle 1 displays just below the Top bin, but above the Section path. Middle 2 displays just below the Section path but above the center display page. Middle 3 and 4 display below the center portion of the page.
- **Top component:** A single top section layout component is available across the top of the section pages.
- **Bottom component:** A single bottom section layout component is available across the bottom of the section pages.

The following figure shows the location of the components available in Configurable Layout.

Component Locations in Configurable Layout



Configurable Bin Layout Steps

Use the following procedure to set up a section using Configurable Layout components. See the section, "Selecting Layout and Setting Display Templates for Sections", for information on using the Fixed Layout feature.

Log in to the Site Administration Application and select Catalog, then Sections (select section), then Templates, then Layout, then Configurable Layout.

Guidelines

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

- Each bin template must also have a source file (JSP) mapped to it. For more information, see the section, "Mapping Source Files to Display Templates", within this chapter.

Group Bins

After assigning specialty sites to groups, you can set up bins which allow navigation to the specialty sites within the groups, by mapping the bins to the section pages of your choice using Configurable Layout. Oracle iStore seeds a group bin for each of these groups: Stores, Support, Partners.

Following is the high-level process:

- Ensure that at least one specialty site has been assigned to a seeded group for the bin you wish to display.
- Map one of the seeded group bins to the section of your choice using Configurable Bin Layout (see the section, "Using Configurable Bin Layout", within this chapter, for more information).

See also: Integrating Oracle iStore with Oracle iSupport, page 25-1, and Integrating Oracle iStore with Oracle Partner Management, page 27-1

The following figure shows an example of how the Stores group bin might look in an implementation of Oracle iStore.

Stores Group Bin Example



Custom Group Bins

If you have created a custom group, you can set up a bin for the custom group.

Following is the high-level process.

- Create a new group by modifying the Oracle AOL lookup code. For example, create NEW_GROUP. See the chapter, Implementing Messages and Prompts, page 16-1, for more information.

- Create a new Display Template for the new group, and register it in Template Manager. See the following sections of the chapter, *Advanced Display*, page 36-1, chapter for more information: "Creating New Templates", and "Registering New Templates in the Template Manager".
- Re-use the existing out-of-box group bin JSP, `ibeCAcdGroupSiteBin.jsp`, and append the new group code parameter to this JSP (as `ibeCAcdGroupSiteBin.jsp?groupCode=NEW_GROUP`).
- Map the new JSP file with the parameter to the new template, setting up specific site-language mappings if desired. See the section, "Mapping Source Files to Display Templates", within this chapter, for more information.
- Map the new template (bin) to the desired location in the catalog, using Configurable Layout fir bins. See the section, "Using Configurable Bin Layout", within this chapter, for more information.

Mapping Source Files to Display Templates

Each template or bin used in the Customer UI must be mapped to a source JSP in order for it to display content.

To map JSP content to existing templates, log in to the Site Administration Application and select *Advanced*, then *Template Manager*, then *Update* icon, then *Add Source File*.

Prerequisites

- An appropriate template has been created. You can use the seeded templates or create templates of your own.
- JSP source files have been created for each site-language combination that you wish to enable. Note that the mapping process will be easier if you have recorded the names of the source files you will enter in the Source File Name field, and have them readily available before this procedure.
- Store all of your source JSPs in the server's `/OA_HTML/` directory.

Guidelines

- Remember, many of the Display Templates have seeded JSPs mapped to *All sites* and *All languages*. For these templates, you can still map additional files and configure the files to display by site-language combination.
- Only JSP files are supported in this context. If you map other types of files, for example image files, the Customer UI will not function properly.

- 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. 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.

Setting up Section Display Templates Text Messages

Two seeded Oracle iStore section Display Templates come with three non-usable FND_MESSAGES seeded as part of their display. If you use either of these section templates and their associated JSPs in a specialty site, you will want to change the seeded text messages.

The template gallery in the Sections pages display these templates as:

- Product Multi-Select
- Product Multi-Select with Section Links

If not altered, the seeded text messages will appear in these two templates as:

- Enter product header 1 alternative 1
- Enter product header 1 alternative 2
- Enter product header 3 alternative 1

The following table summarizes the names of the template JSP source files, their programmatic access names, and their descriptions.

Section Templates Requiring Text Message Setup

Source File (JSP)	Programmatic Access Name	Description
ibeCCtdFSuStMs2I.jsp	STORE_CTLG_FSUBSCT_MU LT_2COL_INCL	Non-leaf section featured products with multiple select two columns
ibeCCtdFSuStMs3I.jsp	STORE_CTLG_FSUBSCT_MU LT_3COL_INCL	Non-leaf section featured products with multiple select three columns

The following table summarizes the referenced source files (JSPs), the seeded message display text, and the seeded programmatic access names for the seeded messages.

Text Messages for Section Templates Requiring Text Message Setup

Seeded Message(s) Display Text	Source File (JSP)	Programmatic Access Name
Enter product header 1 alternative 2 (Displays at the top of the left-hand column.)	ibeCCtdFSuStMs2I.jsp	IBE_PRMT_CT_PRODUCT_HDR1_ALT2
Enter product header 1 alternative 1 (Displays at the top of the left-hand column.)	ibeCCtdFSuStMs3I.jsp	IBE_PRMT_CT_PRODUCT_HDR1_ALT1
Enter product header 3 alternative 1 (Displays at the top of the right-hand column)	ibeCCtdFSuStMs3I.jsp	IBE_PRMT_CT_PRODUCT_HDR3_ALT1

Stored in Oracle Applications Message Dictionary, these messages are seeded in the FND_NEW_MESSAGES table. See the chapter, Implementing Messages and Prompts, page 16-1, for steps to modify the messages.

Using Product Relationships

Product relationships potentially allow you to increase sales by creating associations between products. You can use the seeded relationship type, Related, to offer a related product to a customer. In the Customer UI product detail pages, the relationships show up near the product they are related to.

Without customization, you can set up any combination of Related relationships between products, sections, and categories. To use any of the other relationship types, you must customize the JSPs. See the chapter, Advanced Display, page 36-1, for more information.

List View for Related Products

The List view allows the iStore user to view related products vertically. By default related products are displayed in the List view. The iStore user can perform the following actions in the List view:

- Scroll up and scroll down to view the related product details
- Click on the Add to Cart button to add a product to the shopping cart
- Enter the Quantity for a product

Additionally based on the IBE: Enable Shopping List Management and the IBE: Enable Product Details Pop-up Dialog Profile Option, page A-1, settings you can:

- Use the Shopping List Management drop-down menu
- Click on the Item Details icon to view the Item Details pop-up window

Note that when you create associations between products and sections or categories, you are actually relating only the products within these categories and sections, not the categories or sections themselves. For example, if you set up a relationship between Product A and Section 1, Product A will be related to all of the products within Section 1. Likewise, if you set up an association between Category A and Category B, then it is the products within these categories that are associated in the Customer UI, not the categories themselves. If you wish to exclude some of the products within a related category or section, then you must use the exclusion feature. See the section, "Using Relationship Product Exclusion/Inclusion Functionality", within this chapter, for more information.

Carousel View for Related Products

The Carousel view enables the iStore user to view related products horizontally. The Carousel view provides an alternate way of displaying long lists of related products by introducing a sliding carousel control. The user can toggle between the List view and the Carousel view. The Carousel view is available on the product detail page and the shopping cart page when there are items that have been set up to have a related relationship with one another.

Display Templates to Show the Related Products

You must use one of the following seeded product Display Templates to display the Related relationship type:

- Product Detail Without Image
- Product Detail With Image

See the section, "Product Templates", within this chapter, for more information.

How to Map the Relationships

You can map relationships using one of two methods:

- **Relationship rules** created using the Oracle iStore rule builder --- See the section,

"Creating Relationships Using Mapping Rules", below, for instructions.

- **SQL rules** to define relationships by querying the database on particular fields --- See the "Advanced Display" chapter for instructions.

Note: You cannot use both methods in a single relationship. Additionally, if you set up an SQL rule with a relationship type, you cannot delete it. You can, however, remove any mapping rules that you have set up.

Using the Relationships pages within the Site Administration UI, you can accomplish the following:

- Search for existing relationship types.
- View a list of all relationship types which exist in your organization's implementation.
- Access the Create Relationship page, where you can create a new relationship type.
- Access the Relationship Details page, where you can update existing relationship types and their mappings.
- Delete non-seeded relationship types.

Creating Relationships Using Mapping Rules

For the seeded Related relationship type, you can set up mapping rules.

To set up mapping rules, log in to the Site Administration Application and select Catalog, Relationships.

Guidelines

- The mapping rules define relationships in a From - To form. The types of From and To objects can be: Oracle Inventory categories within the default category set; Oracle Inventory products within the default category set; Any type of Oracle iStore section
- Oracle iStore evaluates each mapping rule you set up and then populates database table rows where the relationships are maintained. For example, if you have a category with two products assigned in your From list and a section with four products assigned in your To list, then Oracle iStore creates a total of eight product relationships.
- Currently, only the Related relationship type is supported out-of-the-box.
- In order to display the Related relationship type, products in the relationship must be mapped to one of the following seeded product Display Templates: Product

Detail Without Image or Product Detail With Image.

- To set up mapping with the Related relationship type, an SQL rule cannot have already been mapped to the seeded Related relationship type.
- In the Add Rules page, in the From and To LOVs, you must select the desired category, product, and section mappings, using the information below as a guide:
 - Category --- Rule starts/ends at an Inventory category within the default category set. Use the flashlight icon to launch the Search and Select: Categories page.
 - Product --- Rule starts/ends at a product. Use the flashlight icon to launch the Search and Select: Products page.
 - Section --- Rule starts/ends at a section. Use the flashlight icon to launch the Search and Select: Catalog Sections page.
- Remember, you are creating associations between only the products within the categories and sections, not the categories or sections themselves.
- From the Relationship Details page, you also may select View Results to view a list of all product-to-product relationships that exist for the relationship type. In the Product Relationships page that appears, you can exclude specific products from the mapping or include products that have previously been excluded. See the section, "Using Relationship Product Exclusion/Inclusion Functionality", below, for more information.

Using Relationship Product Exclusion/Inclusion Functionality

Once you have set up a mapping rule for a relationship type, you may wish to exclude specific products from the rule.

To exclude product(s) from a rule, log in to the Site Administration UI and select Catalog, Relationships, Update icon, View Results, Include/Exclude.

Guidelines

- Prerequisite: A mapping rule has been created in which multiple products are captured.
- Example: You have set up a mapping from Product A to Category 1. Since the mapping will create relationships from Product A to all of the products in Category 1, you may wish to flag certain products as excluded from the relationship mapping rule.

Direct Punchout Catalog

This section describes the Direct Punchout Catalog functionality with Oracle iStore.

Additional Information: Oracle Procurement uses the term, *zones*, for catalogs.

Overview of Direct Punchout Catalog

Implementing Oracle iStore as a direct punchout catalog allows companies to use Oracle iStore as an online catalog accessible from Oracle iProcurement or other third-party procurement systems. The Oracle iStore administrator manages the direct punchout catalog independent of the procurement site. In this type of implementation, buyers navigate from their companies' procurement systems to the Oracle iStore Customer Application online catalogs, then browse for and select items for purchase. Buyers submit their requisitions, which can be tied to a purchase order, into the procurement system. Oracle iStore's support of multiple storefronts, built-in security mechanisms, and support for customer-negotiated pricing allow easy setup and administration of Direct Punchout Catalog.

Additional Information: Out-of-box integration is provided for Oracle iProcurement only, using OAG XML and CXML protocols. Alternatively, any other protocols can be supported by implementing the exposed interfaces and registering them with Oracle iStore.

User Roles

The following user roles for Direct Punchout Catalog will be used throughout this section:

- **Buyer (Procurement User):** This is the user in the procurement system (a B2B user) who makes purchases from the Oracle iStore catalog and creates a requisition in the procurement system. Typically, this user will have a relationship with an organization defined in Oracle Trading Community Architecture (TCA). He will use the iStore Customer Application to select items for requisition, but will not place the order in iStore; instead, he'll add items to the requisition in his company's procurement system.
- **Procurement Administrator:** This is the administrator of the procurement system at the buyer organization.
- **iStore Administrator:** This is the Oracle iStore implementer or administrator who uses Oracle iStore to host the catalog.

Direct Punchout Process Flow

Following is the high-level process flow when using Oracle iStore Direct Punchout Catalog functionality:

1. A buyer logs into a procurement application and starts a new purchase requisition. The procurement system may or may not provide its own catalog, but will have links to one or more supplier catalogs.
2. When the buyer selects an Oracle iStore catalog link, the procurement application sends the login request document to Oracle iStore. Oracle iStore validates the user credentials and sends a login response document to the procurement system. If the login was successful, the procurement system redirects the buyer to the Oracle iStore catalog URL available in the login response document. If the buyer has access to only one site, he will be redirected to that site's catalog (this is standard, non-punchout behavior in Oracle iStore).
3. The buyer browses and/or searches the catalog and selects items to purchase. These items are temporarily stored in an Oracle iStore shopping cart.
4. When the buyer is finished shopping, he selects the Checkout button.
5. The items in the shopping cart are carried to the procurement application in real-time, and those items appear in the shopping cart in the procurement application. The shopping cart's quote status is updated to Store PunchedOut.
6. The buyer checks out with his shopping cart in the procurement application to complete a purchase requisition.

Oracle iStore Site Setup

In a typical implementation, the Oracle iStore administrator sets up one or more sites where buyers from one or more procurement systems may select products. These storefronts are invisible to "regular" customers. Conversely, sites accessible to regular customers are invisible to buyers from procurement systems. The supplier can, however, implement common sites for procurement users and regular customers.

Some features available in customer sites will be disabled in sites meant for procurement users (these changes are discussed later in this section).

Note: Although the Oracle iStore administrator can set up separate sites for procurement users, it is not a mandatory setup. User interface functionality and flows will vary for procurement users and regular customers, but it will be done programmatically, specifically by checking the user type in the session context (see "Procurement User Session", below).

Procurement User Account

In Oracle iStore, a proxy user account (one for each buyer organization) is used to display the catalog and conduct transactions. Therefore, there is not a one-to-one match between the buyers (procurement users) and the Oracle iStore users. The proxy user is set up by the Oracle iStore administrator. Self-service registration is disabled in punchout mode.

In the recommended setup, the proxy user is a standard B2B user. He has a "employee of" relationship with the organization in Oracle TCA and an entry in the FND_USER table in Oracle Applications. The proxy user is always a local user, even if integrating with Oracle Single Sign-On Server (SSO).

The buyer will see the site picker page as the start page in Oracle iStore. Of course if the buyer has access to only one site, he will be redirected to the site catalog, which is current behavior in Oracle iStore.

Setting up of the Punchout Session

Setting up of the punchout session works as follows:

1. The procurement user logs into the procurement system. When he chooses an Oracle iStore online catalog for shopping, a login request document is sent to Oracle iStore for authentication. If the credentials are correct, iStore generates a success login response document and sends it to procurement system. The procurement system obtains the catalog URL from this document and redirects the procurement user.
2. The supplier site returns a punchout setup response, in the form of an XML document, containing a URL that informs the procurement application of the start page for a browsing session on the supplier site.
3. If there is a login or authentication error, an appropriate message will be sent back in the punchout setup response. Since the procurement system is responsible for any error message shown, Oracle iStore doesn't send a specific error to be displayed; the procurement system generic login failure error will display by default.

See "XML Documents", below, for more information on the documents.

User Session Behavior

Oracle iStore Customer UI behavior and the behavior of certain flows are different when the user is recognized as a procurement buyer. Oracle iStore uses the *user type* parameter in the session context to identify its standard users. The user type, *procurement user*, in the session context identifies buyers coming in from procurement systems.

Although only one proxy user account is stored in the database in the supplier site, multiple sessions are supported. Each session has a separate shopping cart, and the cart ID also is stored in the session context. The return URL will be stored in the session context.

In the event of Oracle Web Cache integration, different versions of pages will be cached for procurement users (the procurement user type is already added to the Web Cache version cookie).

Session time-out behaves similarly to any other user (customer, internal user, etc.) in the system. No special handling takes place for procurement users.

Oracle iStore recognizes the buyer's language (available in the punchout setup request), provided the language is supported by the site. If not, the default language of the supplier site will be used.

Customer Application Page Display

Following are the changes for the Customer Application display pages when the user is recognized as a procurement buyer.

- The global links for Order Tracker, Profile, Login/Logout are removed throughout.
- The Help link is removed.
- Within the Cart menu, the links to Carts, Shopping Lists, and Quotes are removed.
- A new navigation link, Return to Procurement, is enabled, allowing the buyer return to the procurement system without selecting any item.
IBE_PRMT_PO_LOGOUT_G is the FND_MESSAGE code which is used to display Return to Procurement text.
- The shopping cart actions -- Express Checkout, Share Cart, Save Cart, Save to List, Pricing Agreement, Additional Information, Attachments, and Request Assistance -- are removed.
- The Checkout action in the shopping cart enables the buyer to return to procurement system with selected items.
- Tips regarding cart expiration are removed.
- No tax information or shipping/handling information displays in the cart.
- The Welcome Bin links -- Login/Logout, Saved/Shared Carts, Quotes, Express Checkout, and Call Me Back -- are removed.
- The person name in the Welcome Bin is replaced with the name of the procuring organization.

Support for Items

Oracle iProcurement currently does not maintain relationships between items; therefore, by default, certain restrictions exist on the types of items that can be purchased via catalog punchout, as shown below.

Supported Items

- Configured items are supported. In this case, Oracle iStore sends the configuration reference of the configuration in the shopping cart to the procurement system during checkout. For cXML, the reference is stored at the `supplierAuxillaryID` field; for OAG XML, it's the `supplierReferenceNumber` field. The reference key is of the format, `:ConfigHeaderId-RevisionNumber`.
- In the case of configured items, only the top model line is returned in the catalog and shopping cart.

Unsupported Items

- Items that have a dependency on other items cannot be used in punchout. Examples of such items are: Extended warranties, bundles or kits, and promotional items (buy one get one free). See "Special Rules for Promotional Items", below, for additional information on promotional items.
- Telecommunications service orders (so-called *MACD*) scenarios are not supported because the associated business processes (recurring billing, change/termination of service, etc.) are not supported by existing protocols.

Special Rules for Promotional Items

- Oracle iStore does not maintain relationships between a qualifying promotional item and the free item in punchout flow (i.e., if the qualifying item is added and then later removed, iStore cannot detect this action and remove the free item). However, to accomplish a buy-one get-one-free setup, implementers can utilize pricing modifiers to avoid the automatic addition of the free item to the cart when the qualifying item is added. For example, a pricing qualifier attribute such as Quote Source Code can be used (e.g., `Quote_Source_Code <> iStore Punchout`), along with other qualification rules.

Note that programmatically, Oracle iStore does not enforce the restrictions on item types.

Send Shopping Cart

In a catalog punchout session, the checkout button in the shopping cart is a link to a processing page that creates an XML document with the shopping cart items and sends it to the procurement system. (See "XML Documents", below, for more information on the documents.) If there are two shopping carts in two different operating units in two

different specialty sites, only the cart in the current operating unit will be sent. The shopping cart sender page is a status page that will temporarily appear on the browser and then automatically redirect to the procurement system. The message that appears is "Sending shopping cart to procurement system...". This message can be modified by modifying the following FND message: IBE_PRMT_PO_CHKOUT_WAIT.

If the buyer decides to return to the procurement system without selecting any item, he can do so by selecting the Return to Procurement global navigation link. In this case, an XML document with no items will be sent to the procurement system. Refer to the section, "Customer Application Page Display", above, for more information on the Return to Procurement global navigation link.

Hand-off from iStore happens when the shopping cart is sent to the procurement site. How the procurement system sends the purchase order to the order management system of the supplier site is determined by the implementer outside of the Oracle iStore implementation, as is the freezing of prices in the purchase order.

The shopping cart contains several attributes whose values are certain codes. These are unit of measure (UOM) codes, currency codes, categories, languages codes, etc. All of these codes, except language, will be sent in Oracle E-Business Suite-supported codes. Language will be sent in ISO language code.

Cart (Quote) Status Transitions

When a buyer creates a cart in Oracle iStore by adding an item to the cart, the Oracle Quoting source code will be iStore ProcPunchout, and the quote status will be Store Draft. When the buyer checks out, the quote status will change to Store Punchedout. The source code will remain iStore ProcPunchout.

Security and Privacy

Procurement users can access catalog pages (including the Specialty Site Page) and shopping cart pages only. Forced browsing to other pages is disallowed.

Note: If you use Oracle iStore as an online catalog from Oracle iProcurement, then Oracle iStore and Oracle iProcurement must be deployed on different application servers. Due to technical reasons, they cannot be deployed on the same application server. This restriction does not apply if you use third-party procurement systems with Oracle iStore.

XML Documents

The following table describes the Oracle Native XML document and cXML documents for the setting up of the punchout session and send shopping cart events.

XML Documents Involved in Catalog Punchout

Document Purpose	Oracle Native XML Document	cXML Document	Comments
Setting up of the Punchout Session	loginRequest, loginResponse	PunchOutSetupRequest, PunchOutSetupResponse	Procurement system generates an XML document, which includes a base set of user details and the return URL for the procurement instance. The supplier generates an XML document accepting the requester's logon.
Send Shopping Cart	shoppingCart	PunchOutOrderMessage	iStore sends the shopping cart information to the procurement system in a URL-encoded XML document.

Display Templates

The following Customer Application Display Templates are involved in the Direct Punchout Catalog functionality:

- Punchout Login Page
- Punchout Logout
- Punchout Page

By default, these templates are mapped to supplied JSPs. For more information on these templates, see the Seeded Display Data, page C-1, appendix.

Oracle iStore Implementation Tasks for Direct Punchout Catalog

This section describes the Oracle iStore implementation steps required for the functionality. Following are the steps:

1. Step 1 - Set Profile Options
2. Step 2 - Create Buyer Organization and User

3. Step 3 - Create Oracle iStore Sites
4. Step 4 - Send Information to Procurement Organization

For more information, see *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout* and the *Oracle Procurement Supplier's Guide to Punchout and Transparent Punchout*.

Step 1 - Set Profile Options

Set the profile option, IBE: Merchant DUNS Number, to the supplier's DUNS number at site level. If supplier has multiple DUNS numbers, set at responsibility level.

Set the profile option, JTF_UM_MERCHANT_NAME, to the merchant name (e.g., Oracle iStore) at site level.

Step 2 - Create Buyer Organization and User

Create the buyer organization as a customer and create a proxy contact for the organization (if the buyer organization already exists, there is no need to create a new organization):

1. Log in into Oracle Forms and select Trading Community Manager responsibility.
2. Navigate to Customers, Standard.
3. Enter customer data:
 - **Name:** Enter procuring organization name
 - **Address:** Enter procuring organization address
 - **Contact:** Enter a customer contact
4. Save the changes.

Create a username and password for the buyer proxy contact:

1. Switch Responsibility to System Administrator.
2. Navigate to Security, User.
3. Enter user data:
 - **User Name:** Enter the proxy user's username.
 - **Password:** Enter the proxy user's password.
 - **Customer:** Bring up the LOV and search for the contact of the procuring organization; select the contact.

4. Save the changes.

Step 3 - Create Oracle iStore Sites

Create Oracle iStore sites where the buyer will purchase items. Dedicated sites can be created, or existing sites can be utilized.

To restrict a site to the procurement organization, you may use the organization access restrictions functionality and restrict the site to only the procurement organization (also disallow the buyer organization from all other sites). If a dedicated site is not required, this step is not required.

See the chapter *Implementing Site Management*, page 5-1, for more information.

Step 4 - Send Information to Procurement Organization

As the host of the Oracle iStore catalog, send the following information to the procurement organization:

- **Merchant Name:** This is the same value set in the profile option, JTF_UM_MERCHANT_NAME.
- **DUNS Number:** This is the same value set in the profile option, IBE: Merchant DUNS Number.
- **List of Item Categories:** A list of item categories can be obtained by running the script, `ibevpocgrs.sql`, which is shipped out-of-the-box.
- **List of UOMs implemented**

If Using Oracle Native XML Protocol

If using Oracle Native XML protocol for the messaging, send the following:

- **Company Name:** This is the proxy user's username.
- **Password:** This is the proxy user's password.
- **URL:** `<scheme>://<hostname>:<port>/OA_HTML/ibeCPopLoginA.jsp?prtcl=OAG_XML`

If Using cXML Protocol

If using cXML protocol for the messaging, send the following:

- **Domain:** This is the proxy user's username.
- **Identity:** This is the proxy user's username.
- **Password:** This is the proxy user's password.

- **URL:** <scheme>//<hostname>:<port>/OA_HTML/ibeCPopLoginA.jsp?prctl=CXML

Oracle iProcurement Implementation Tasks for Direct Punchout Catalog

If using Oracle iProcurement for the procurement system, complete the implementation steps in this section. Following are the high-level steps:

1. Step 1 - Set up Data Mapping
2. Step 2 - Create Punchout Catalog
3. Step 3 - Publish Catalog

For more information, see *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout* and the *Oracle Procurement Supplier's Guide to Punchout and Transparent Punchout*.

Step 1 - Set up Data Mapping

Item categories and units of measure (UOM) used at the supplier site may not match those at the procurement site. Oracle iProcurement leverages Oracle XML Gateway's capability to transform this data when a shopping cart is received from supplier.

Define the mapping in Oracle XML Gateway:

1. Log in to Oracle Self Service Web Applications.
2. Select eCommerce Gateway, Vision Enterprises responsibility.
3. Navigate to Setup, Code Conversion, Define Code Conversion Values.
4. For each item category in the supplier's inventory database, enter the following:
 - **Category:** ITEM_CATEGORY
 - **Direction:** IN
 - **Internal Value:** Category value used in iProcurement
 - **External:** Category value returned in shopping cart by the supplier
5. For each UOM in the supplier inventory, enter the following:
 - **Category:** UOM
 - **Direction:** IN
 - **Key1:** Same key as above ("Supplier1")

- **Internal Value:** UOM value used in iProcurement
- **External:** UOM value returned in shopping cart by the supplier

Step 2 - Create Punchout Catalog

Create the punchout catalog:

1. Log in to Oracle Self Service Web Applications.
2. Select the iProcurement Catalog Administration responsibility.
3. Navigate to Manage Content, Catalogs, Create.
4. Enter the following data for the catalog:
 - **Type:** Punchout catalog
 - **Source:** Supplier
 - **Access Method:** Direct punchout (Oracle native XML), or Direct punchout (cXML)
 - **If Oracle Native XML, Company Name:** The proxy user's username
If cXML, Domain: username; Identity: The proxy user's username
 - **Catalog Name:** Any Name
 - **Key 1:** Key entered in XML Gateway ("Supplier1")
 - **If cXML, Supplier Name:** Supplier Name
 - **If Oracle Native XML, Punchout URL:** <scheme>//<hostname>:
<port>/OA_HTML/ibeCPopLoginA.jsp?prtcl=OAG_XML
If cXML, Punchout URL: <scheme>//<hostname>:
<port>/OA_HTML/ibeCPopLoginA.jsp?prtcl=CXML
 - **Password:** The proxy user's password
 - **All prices are negotiated:** Check
5. Submit the configuration.

Step 3 - Publish Catalog

In Oracle iProcurement, publish the catalog:

1. Navigate to Manage Content, Stores, Create Store (an existing store can also be used instead).
2. Enter the store information:
 - **Store Name:** Any Name
 - **Store Type:** Catalog
 - **Add Catalog:** Select the catalog created earlier
3. Submit.

Implementing Content

This chapter covers the following topics:

- Overview of Implementing Content Chapter
- Content Overview
- Understanding Content Components
- Copying Content Components
- Understanding Media Objects
- Using the Content Repository

Overview of Implementing Content Chapter

This chapter contains information on how implement content display in the Oracle iStore Customer Application pages, without customization.

Advanced display techniques --- including limited customizing information --- can be found in the chapter, *Advanced Display*, page 36-1.

Content Overview

Oracle iStore features reusable content tools which allow you to present content in the Customer Application. These content tools let you map content source files which appear in the Customer Application, allowing you to provide more than just the section or product description information. The content you present in the Customer Application can be images, HTML files, or text messages.

The content tools also allow you to set default content based on Oracle Inventory categories.

The following content functionality is available in Oracle iStore:

- **Content Components:** These are logical placeholders in the Display Templates for content associated to media objects. See the section, "Understanding Content

Components", within this chapter, for more information.

- **Media Objects:** Media objects are logical bridges that connect content component placeholders with source files to present images or HTML content in the Customer UI. Some media objects do not need to be linked to content components in order to be useful. See the section, "Understanding Media Objects", within this chapter, for more information.
- **Content Repository:** The Content Repository allows you to view and upload the actual files that provide the content for your specialty site pages. See the section, "Using the Content Repository", within this chapter, for more information.

Integration with Oracle Content Manager can provide additional content capabilities. This optional integration is discussed in the chapter, Integrating Oracle iStore with Oracle Content Manager, page 24-1.

How Oracle iStore Determines Which Content to Display

In some cases, the content you map for display in your specialty sites can overlap with content set at other levels. For example, you may set category-level default content, but then also set product-level content for a specific product. Oracle iStore follows certain rules for determining which content to display, based on the following three main levels:

- Product-Level Content
- Category-Level Content
- Site- and Section-Level Content

Oracle iStore checks for and then prioritizes the content display as follows:

- If iStore finds content defined at the product-level, it displays it first. If no product-level content is found, category-level default content is used.
- If iStore finds content defined at section-level, it displays it. Otherwise, site-level content is used.
- If no content exists for any of the other levels, then site-level default content is used.

Note: Only the content components whose Class designation is Section will show in the Section Content page, and only those content components whose Class designation is Product will show in the Product Content page. Normally, the media object associated with a content component in Sections page cannot be used by a product.

Product-Level Content

Product-level content occurs when, in the Products, Content page, you link content components to media objects, which are in turn mapped to content files. Oracle iStore

always uses the product-level content in favor of any other associations to content defined at other levels.

Category-Level Content

Content associated with a product category will use the category-level mapping instead of site-level.

Site- and Section-Level Content

The rules that determine the display of section-level content has two levels: site-level and section-level.

- **Section-Level Content:** Section-level content occurs when, in the Sections, Content pages, you create an association between a section content component and a media object. Again, the content that actually displays in the Customer Application is determined by the content files linked to the media object and any site/language mappings for the content files. If this level of association is not made, then Oracle iStore uses the site-level content.

The content components available in the Sections, Content page are those that apply to section display.

- **Site-Level Content:** When you map a content component to a media object in the Advanced, Content Component screens, you are choosing a default media object at site level. Of course, the content that actually displays in the Customer Application is determined by the content files linked to the media object and any site/language mappings for the content files.

Site-level content is only presented if no product, category, or section associations exist.

Media Objects and Content Components Classes

Media objects and content components are categorized by **Class**, based on their content purpose. For lists of the classes, see the following sections within this chapter:

- "Seeded Content Component Classes"
- "Seeded Media Object Classes"

Content components of any class can be associated to any class of media object, and vice versa. Oracle iStore does not perform any validation of the classes; however, as a best practice, it is recommended that you use matching classes together.

By default, when the Search and Select: Media Objects page is retrieved from the content component mapping screens, the media objects LOV contains media objects of the same class as the content component being mapped.

Seeded Content Component Classes

The class designation of content components can be updated **only** for non-seeded content components for which there are no existing media object assignments.

Seeded content components classes are:

- **Product:** For content components which display product content
- **Section:** For content components which display section content
- **Section and Product:** For content components which display both product and section content

Seeded Media Object Classes

The class designation of media objects can be updated **only** for non-seeded media objects -- i.e., media objects that you create. For seeded media objects, the class is read-only.

Seeded media objects classes are:

- **Product:** For media objects which display product content
- **Section:** For media objects which display section content
- **Section and Product:** For media objects which display both product and section content
- **Message:** For media objects which are text messages

Note: Seeded message-class media objects can be called directly from some Display Templates, without having to first be mapped to a content component

- **Others:** For all other classes of media objects, and for backward compatibility
- **Logo:** For the display of logo-type elements of the Web pages

Media Object Classes and iStore JSP Calls

All classes of the media objects can be called directly from the template by using the API, `DisplayManager.getMedia(<accessName>)`. This, however, requires customizing the JSPs.

As a best practice, to avoid having to customize the JSPs, use the seeded media objects with class of Product, Section, or Section and Product, with the seeded content components that match these categories.

The seeded media objects of classes, Others and Logo, are called directly from the JSPs. Therefore, for these classes, you do not need to map them to content components in

order for them to display.

The media objects of class, `Message`, are called directly by using the API, `DisplayManager.getTextMediaOrFndMsg()`.

A list of seeded media objects can be found in the appendix, *Seeded Display Data*, page C-1.

Class Name and Description Lookup

The class name for media objects and content components is defined as extensible lookup in Oracle Application Object Library (AOL). This means you can add additional lookup names and definitions, or change the existing ones, through the Oracle Forms interface.

The name of the lookup is `IBE_M_MEDIA_OBJECT_APPLI_TO`. For directions on how to modify seeded lookups, see the chapter, *Implementing Messages and Prompts*, page 16-1.

Understanding Content Components

Oracle iStore's seeded Display Templates contain programmatic access names of specific content components. The content components are placeholders in the templates that expect a certain type of content. Content components define the types of media objects that can display on a Web page. All but the `Message`, `Other`, and `Logo` classes of media objects must be linked to a content component in order to present content in the Customer Application. A template's category or type determines which of the seeded content components it may call.

You can set up content component-media object mappings using the following paths:

- Catalog: Sections: Content
- Catalog: Products: Content
- Advanced: Content Components
- Advanced: Categories: Assign Content

Each media object also must link to at least one content source file.

Seeded Content Components

The following are the seeded content components:

- Product Large Image
- Product Small Image

- Product Additional Information
- Section Small Image
- Section Additional Information
- Section Additional Information 1 Through 5
- Section Attributes

See the relevant sections below for information about each of these content components.

Remember, out-of-the-box, all of the content components must be linked to media objects -- which in turn must be mapped to content files -- to present content.

Product Large Image

Use this content component to display a product large image in templates that display this content component. The templates that display this content component are the following **product** display templates:

- Product Basic Information with Image
- Product Detail with Image
- Product Detail with Services

As a best practice, use with product-class media objects. The programmatic access name is STORE_PRODUCT_LARGE_IMAGE.

See the chapter, *Implementing the Catalog*, page 9-1, for more information about these templates.

Product Small Image

Use this content component to display a product small image in templates that display this content component. The templates that display this content component are the following **section** display templates within the Section Contains Products Only and Section Contains Featured Subsection categories:

- Product Detail
- Product Detail Multi-Select (only within Section Contains Products Only category)
- Product Detail with Image
- Product Detail with Services

As a best practice, use with product-class media objects. The programmatic access name is STORE_PRODUCT_SMALL_IMAGE.

See the chapter, *Implementing the Catalog*, page 9-1, for more information about these templates.

Product Additional Information

Use this content component to display additional information for a product in templates that display this content component. The templates that display this content component are the following **product** display templates:

- Product Detail with Image
- Product Detail without Image
- Product Detail with Services

As a best practice, use with product-class media objects. The programmatic access name is `STORE_PRODUCT_ADDTL_INFO`.

See the chapter, *Implementing the Catalog*, page 9-1, for more information about these templates.

Section Small Image

Use this content component to display a small image for a section in templates that display this content component. The templates that display this content component are the following **section** display templates:

- Subsection List with Product Detail within Section Contains Navigational Subsections Only
- Subsection List with Product Pull-Down within Section Contains Navigational Subsections Only
- Product Detail within Section Contains Products Only
- Product Pull-Down within Section Contains Products Only
- Multilevel Subsections List with Content within Component for Section Containing Navigational Subsections Only (configurable layout)
- Section Detail with Content within Components for Section Containing Products Only (configurable layout)

As a best practice, use with section-class media objects. The programmatic access name is `STORE_SECTION_SMALL_IMAGE`.

See the chapter, *Implementing the Catalog*, page 9-1, for more information about these templates.

Section Additional Information

Use this content component to display additional information at the section level, in templates that display this content component. The templates that display this content component are the following **section** display templates:

- Section Contains Featured Subsection category:
 - Product Detail
 - Product Multi-Select
 - Product Multi-Select with Section Links
- Section Contains Navigational Subsections Only category:
 - Subsection List
 - Subsection List 2
- Section Contains Products Only category:
 - Product Pull-Down
 - Product Multi-Select
 - Product Multi-Select with Drill-Down
- Component for Section Containing Navigational Subsections Only (configurable layout) category:
 - Multilevel Subsections List with Content
- Components for Section Containing Products Only (configurable layout) category:
 - Section Detail with Content

As a best practice, use with section-class media objects. The programmatic access name is `STORE_SECTION_ADDTL_INFO`.

See the chapter, *Implementing the Catalog*, page 9-1, for more information about these templates.

Section Additional Information 1 Through 5

The content components, Section Additional Information 1 through Section Additional Information 5, display in the following two section templates:

- Multilevel Subsections List with Content

- Section Detail

Programmatic access names:

- STORE_SECTION_ADDDTL_INFO1
- STORE_SECTION_ADDDTL_INFO2
- STORE_SECTION_ADDDTL_INFO3
- STORE_SECTION_ADDDTL_INFO4
- STORE_SECTION_ADDDTL_INFO5

Item Details and Product Comparison Content Components

To customize the default Item Details content or the default Product Comparison content, the Oracle iStore Administrator accesses and changes the content components that manage section content and product content. By adding or changing the XML definitions values the Oracle iStore Administrator can assign additional content at the section and product levels in a XML file.

The following are the available Item Details and Product Comparison Content Component predefined values:

Section Level Content Component:

- Content Name: Section Attributes
- Content Class: Section
- Programmatic Access Name: STORE_SECTION_COMPARISON
- Content Description: XML content includes the Extended Attribute information used for the product comparison at the Section level
- Content Default: None
- Update Flag: Enabled

Product Level Content Component:

- Content Name: Extended Attributes
- Content Class: Product
- Programmatic Access Name: STORE_PRODUCT_EXT_ATTRIBUTES
- Content Description: XML content includes the Extended Attribute information used for the product comparisons at the Product level.

- Content Default: None
- Update Flag: Enabled.

Copying Content Components

Oracle iStore allows the iStore Administrator to copy seeded and custom product content components from a source product to multiple products. The seeded product content components include the Product Large Image, Product Small Image, Extended Attributes, Thumbnail, and Product Additional Information. The iStore Administrator can also select custom content components and copy them to other products.

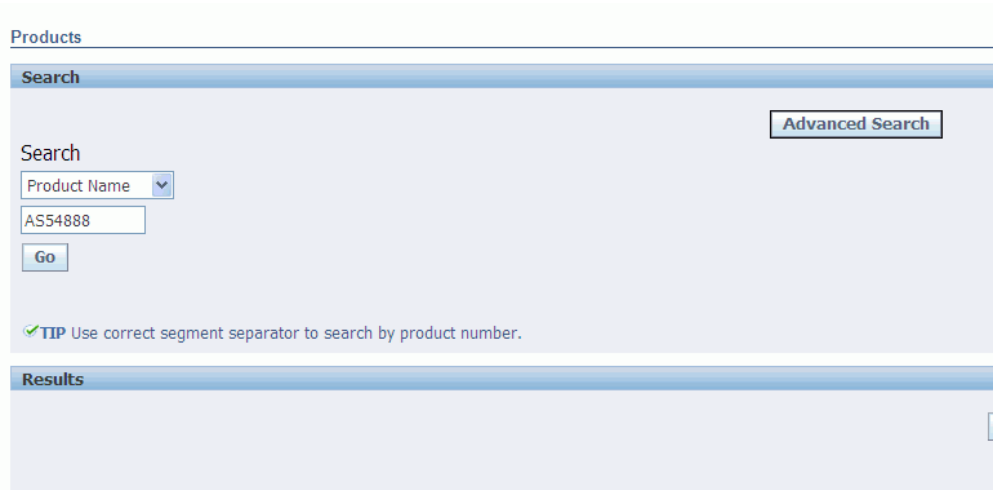
Note: Section content components cannot be copied.

The iStore Administrator can select the Copy From product list by performing a search and selecting a single product. The iStore Administrator selects the Copy To product list by performing a search and selecting multiple products.

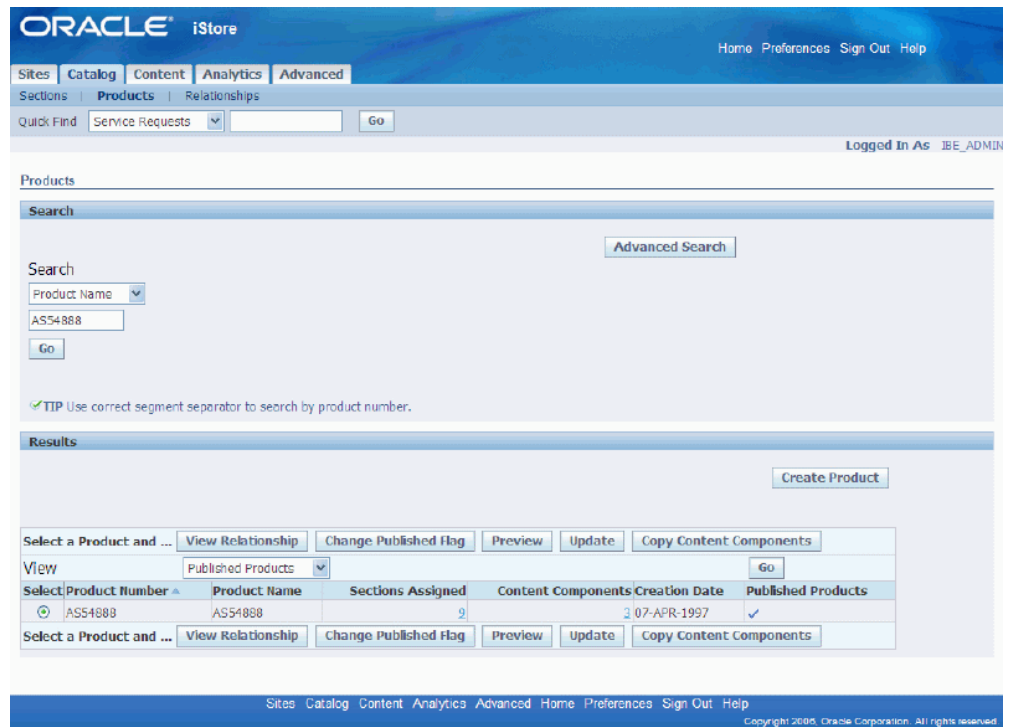
After selecting the Copy To products list, the iStore Administrator reviews the parameters for the content components to be copied and removes any of the Copy To products from the list. The source product content components marked by the iStore Administrator are copied to each target product selected in the Copy To step.

To use the Copy Product Content Components feature:

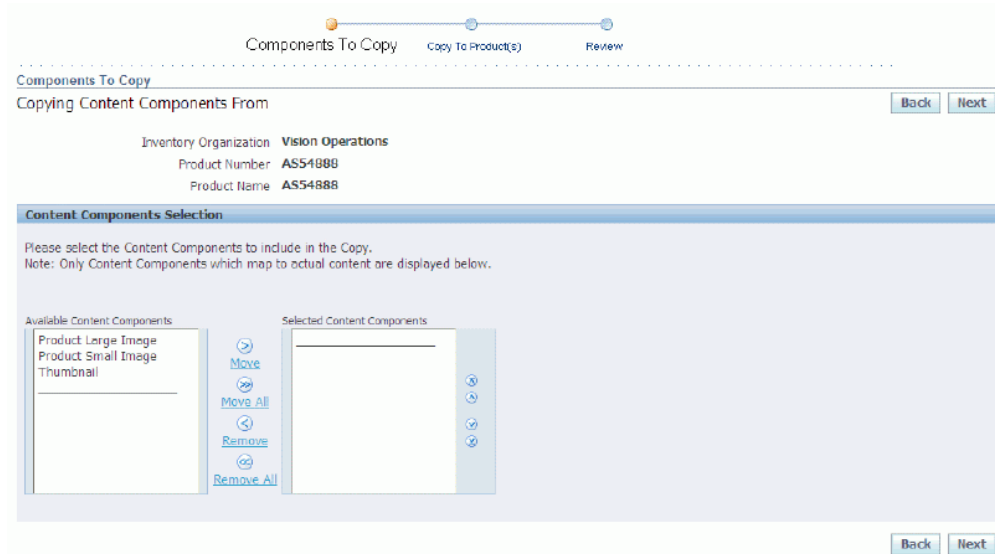
1. Navigate to the Catalog tab and select the Products subtab. The Products page appears.



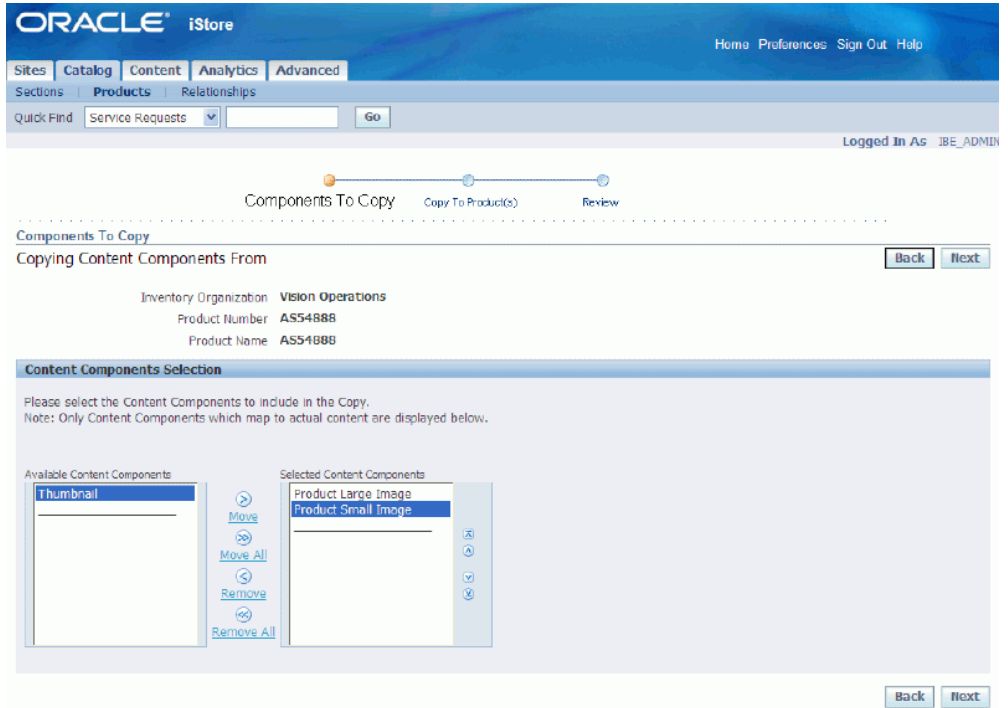
2. Search for a source product that contains the content components and select it.



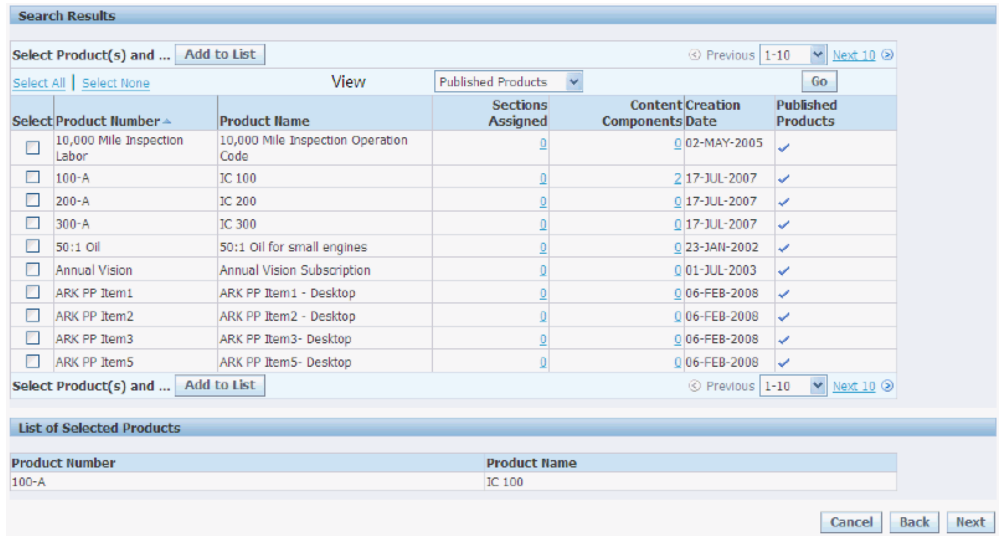
3. Click on the Copy Content Components button. The Components to Copy page appears. This page displays all the available content components to copy.
4. Select a content component from the Available Content Components region and click on the Move link to move it to the Selected Content Components region.



5. Click on the Move All link to move all content components to the Selected Content Components region. When finished, click on the Next button. The Copy To Products page appears. You can remove content components from the Selected Content Components region if needed by selecting content components and clicking on the Remove or the Remove All link.



6. Search for the target products that will receive the content components from the previous step and click on the Add to List button to add the products to the List of Selected Products region.



7. Repeat step 6 to add more target products to the List of Selected Products. When finished, click on the Next button. The Review and Submit page appears. In this page, the iStore Administrator can review the Copying Content Components From (source), Selected Content Components, and Copying Content Components To

(target) details. You can remove target products if needed by selecting a target product and clicking on the Remove button.

Components To Copy Copy To Product(s) Review

Review and Submit

Cancel Submit Back

Copying Content Components From

Inventory Organization: **Vision Operations**
Product Number: **AS54888**
Product Name: **AS54888**

Selected Content Components

Product Large Image
Product Small Image

Copying Content Components To

Select Product(s) and ... Remove

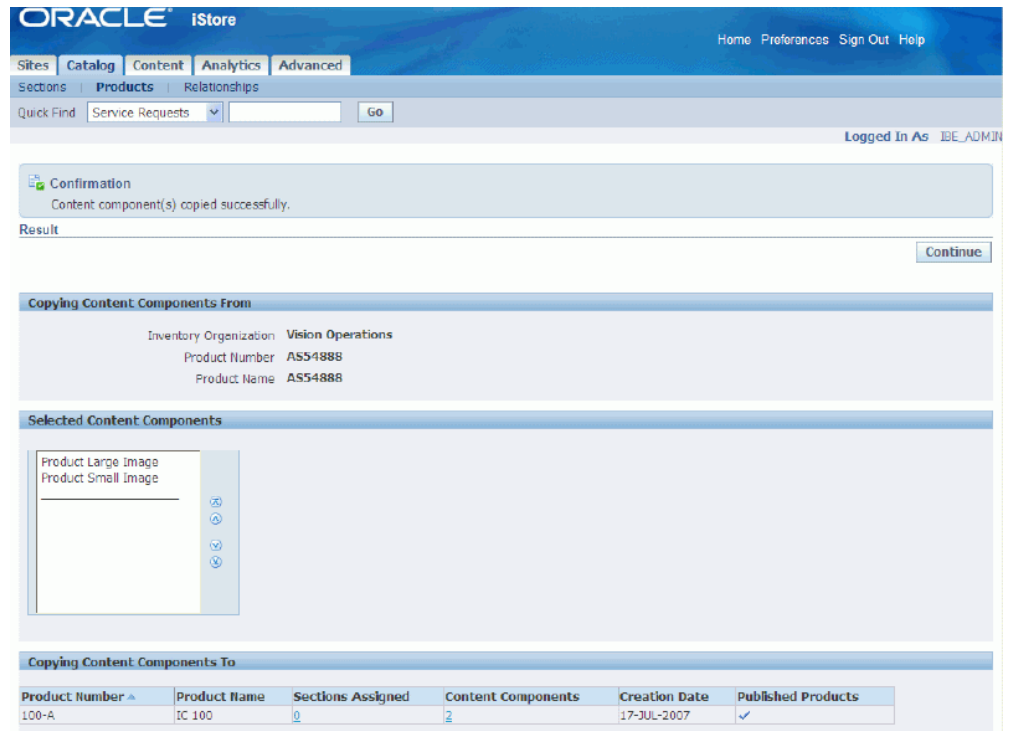
Select All | Select None

Select Product Number	Product Name	Sections Assigned	Content Components	Creation Date	Published Products
<input type="checkbox"/> 100-A	IC 100	0	0	17-JUL-2007	✓

Select Product(s) and ... Remove

Cancel Submit Back

8. Click on the Submit button to copy the content components. The Result page appears, displaying a message confirming that the product content components were copied successfully.



- Click on the Continue button to return to the Products page.

Understanding Media Objects

In Oracle iStore, media objects allow you to present content in the Customer Application, beyond the name and description information provided through the section and product catalog functionality. For example, to present an image for a product, you can map an image file to a media object, and then link the media object to a content component at the product level. The template that includes the content component then displays the image.

Types of content allowed include image files, HTML files, and text messages. You can configure the content to display at the product or section level. You also can set up content to display at the Inventory category level, or at the site level.

The multi-layer structure allows you to reuse a single media object in several different areas, by associating different content source files to different combinations of sites and languages.

Media Objects Guidelines and Behavior

Following is the behavior of media objects, and some guidelines:

- Each media object links to at least one content source file. This source file presents

the content. For example, you link an image file such as a .gif to a media object, and the .gif provides the actual content, while the media object provides the display logic. In addition to this association, the template must be able to find the media object to display the content. Templates can find media objects either directly or through content components, depending on the media object used.

- Most of the commonly used media objects (all but Message-class, Other-class, and Logo-class media objects) must be linked to a content component to be usable in the Customer UI.
- Media object associations can be made at the site, section, product, or Inventory category levels.
- By default, a media object's content source file is linked to All sites and All languages. However, in the case of a multi-site and/or multi-language implementation, content items can be mapped to site and language combinations to present specific content for different sites and languages.
- Media objects can use as their source files the following file types:
 - image files -- examples include: .jpg, .gif, .bmp
 - HTML files -- examples include: .htm, .HTML
 - text messages
- Each seeded media object has a programmatic access name. For media objects called directly from the templates, the templates use this programmatic access name to call the media object and display its content. In the case of a media object linked to a content component, the template calls the content component's programmatic access name, not the media object's --- so in this case, a media object's programmatic access name is not used.
- During upgrades, Oracle iStore does not alter custom media objects and their file mappings. In the event a default (All sites-All languages) mapping has been changed for a media object by implementers, Oracle iStore's patching script uses the last_updated_by data (which is generated whenever seeded data is altered) to avoid overwriting custom data.

The section, "Assigning Content Items to Media Objects", within this chapter, contains additional information about how to associate content items (files) to media objects.

Using Media Objects to Present Message Text

Oracle iStore ships with hundreds of Customer UI text messages, and several of these text messages are presented in the Media Objects pages as messages that you can map as content to individual sites.

Text messages for Oracle iStore are stored in the Oracle Application Object Library (AOL) schema. More information about these can be found in the chapter, *Implementing Messages and Prompts*, page 16-1.

You map new content for the message-class media objects in the same way as other media objects, although the behavior is somewhat different.

The following table shows the AOL messages that are also media objects.

Oracle AOL Text Messages Seeded as Media Objects of Message Class

Media Object Name	Programmatic Access Name	Description	Default Text
Tax Message 1	IBE_PRMT_ORD_IS_I T_TAXABLE	Prompts the user to indicate whether the order is taxable or not. Located in <i>ibeCPmdPmtOptions.jsp</i> , Payment and Billing Information Page.	Is this Order Taxable?
Payment book PO message	IBE_PRMT_PMTBK_ PO_MSG	Payment book PO message. Located in <i>ibeCPmdPmtOptions.jsp</i> , Payment and Billing Information Page (purchase order payment option).	If you have a purchase order, please enter Purchase Order Number:
New credit card message	IBE_PRMT_ORD_NE W_CREDIT_CARD	New credit card message. Located in <i>ibeCPmdPmtOptions.jsp</i> , Payment and Billing Information Page (new credit card payment option).	New Credit Card
Payment book fax credit card message	IBE_PRMT_PMTBK_ FAX_CC_MSG	Payment book fax credit card message. Located in <i>ibeCPmdPmtOptions.jsp</i> , Payment and Billing Information Page (fax credit card payment option).	Print and fax your completed Order Confirmation page to 123-456-7890

Media Object Name	Programmatic Access Name	Description	Default Text
Order Confirmation Message 1	IBE_CHKOUT_ORD_CONFIRM_TEXT	Prompts the user to note order information.	Please print this page and keep it for your records. If you are faxing your credit card number or purchase order, remember to complete the Faxed Order section below before faxing.
Order Confirmation Message 2	IBE_CHKOUT_ORD_FAX_PO_MSG	Prompts the user on the Order Confirmation page for Purchase Order and fax.	Please fill in the blanks and fax us this Order Confirmation page and Purchase Order.
Help message	IBE_PRMT_HELP_MESG_G	<p>Message for online help. Located in <code>ibeCZzdHelp.jsp</code>, Help Desk Index Page (can be used to show customer service contact information).</p> <p>You can customize <code>ibeCZzdHelp.jsp</code> or create a new JSP and map it to the template, <code>STORE_CUSTOM_HELP.ibeCZzdHelp.jsp</code>; it includes the template, <code>STORE_CUSTOM_BOTTOM</code>.</p>	This is the help area to be customized by merchant.
iStore System Saved Cart Name	IBE_PRMT_SC_DEFAULTNAMED	<p>Default cart name for system-saved carts.</p> <p>Displays in cart-related JSPs.</p>	Store Saved

Media Object Name	Programmatic Access Name	Description	Default Text
iStore Unnamed Cart Name	IBE_PRMT_SC_UNN AMED	Default name for unsaved carts. Displays in cart-related JSPs.	Store

Message-Class Media Objects Guidelines and Behavior

Following are guidelines and behavior for message-class media objects:

- If you associate a message-class media object with a source file and map it to All sites and All languages, you override the Oracle AOL text mapping for the message. To avoid this, you can associate the message-class media object with a source file and map it to a specific site-language combination. In this case, the Oracle AOL text mapping will still remain at the All Sites-All Languages level.
- When providing different message content for sites in different languages, several content files can link to one media object to present the messages in different languages. For example, if you are using a text file, `text_eng.txt`, mapped to All sites/English language, and `text_kor.txt` mapped to All sites/Korean language, you only need to use one media object for both source files.
- The tables that contain the message-class media object information and the AOL text messages are not synced. Therefore, if you update AOL messages in Forms, they will not appear as updated in the Site Administration UI Media Object pages, and vice versa.
- Message-class media objects do not need to be associated with content components in order for them to display in the Customer UI.
- Each message-class media object has a programmatic access name which the Display Template uses to display the message.

Seeded Media Objects

For a list of seeded media objects, see the appendix, Seeded Display Data, page C-1.

Media Objects Search Utility

In the media objects search utility, you can search by Name, Programmatic Access Name, Keywords, Description. Keywords must be entered for a media object by the user before they are available in the search mechanism. The search utility is available

from the pages mentioned in the section, "Creating New Media Objects", below.

Creating New Media Objects

You may wish to create new media objects, if the seeded ones do not meet your business requirements.

To create a new media object, 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

After arriving at the Create Media Object page, select the Create Media Object icon.

Create Media Object Icon



Directions on how to assign Section and Product content components to media objects can be found in the chapter, *Implementing the Catalog*, page 9-1.

Guidelines

- Media Object Name field -- This name will not appear in the Customer Application.
- Programmatic Access Name field -- Use the following naming guidelines: If this will be a media object used with a content component, then the value entered here will be used for your own internal business purposes. If this will be a media object used without a content component (e.g., called directly from a Display Template), then this name must be unique and entered into the Display Template call to the media object. See the chapter, *Advanced Display*, page 36-1, for details on how to customize the Display Templates.
- Keywords field -- Separate multiple keywords by commas. After you enter them in the system, you can search by keywords using the media object search utility.
- Description field -- This description will not appear in the Customer Application; it is for your internal business purposes only.

- Select a class for the media object, based on its display purpose. See the section, "Media Objects and Content Components Classes", for guidelines.

Assigning Content Items to Media Objects

Each media object you use in your sites must link to at least one content item. Additionally, you can create site/language mappings linking different content items to different sites and their supported languages.

To assign a media object a content item and map a site and language combination to the content item, log in to the Site Administration Application and select Content, then Media Objects (select media object), then Update, then Add Content.

Guidelines

- If you have not yet uploaded your source files (content items) 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. See the section, "Using the Content Repository", within this chapter, for more information.
- Mapping content to specific sites/languages -- Map to site: In the Add Content page, in the Source File Mapping area, select from the Site LOV the site that this source file should be mapped to. To map the content to all sites and all languages, select All. Once you have selected a site, the Language LOV in the table will become available, showing all languages supported by the selected site. Use the Language LOV to select the appropriate language for the source file.
- If your instance is already integrated with Oracle Content Manager, then the above guidelines are not valid. See the chapter, Integrating Oracle iStore with Oracle Content Manager, page 24-1, for more information.

Using the Content Repository

Oracle iStore's Content Repository is a tool that allows source files to be readily available to you for use as content for media objects. You must first upload files from your local file system to the database before they become available in the repository. The files are uploaded into the database (FND_LOBS table), not to the file system of the server.

Note: The functionality of the Content Repository is impacted by a profile option -- See the section, "Understanding IBE: Use Database for Media Storage", below, for details.

Content Repository Overview

The Content Repository page lists the source files in your content repository, and allows you to preview the files. It also allows access to other pages where you can upload and

update source files.

In the Content Repository page you can:

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

Understanding IBE: Use Database for Media Storage

The profile option, IBE: Use Database for Media Storage, should be set to Yes at site level in order to enable certain functionality in the Content tab, as described below:

When set to Yes:

- In the Add/Update Source File page, the flashlight icon (used to launch the LOV for content repository) is displayed.
- In the Add/Update Source File page, the Upload File button is displayed.
- The Content Repository tab is displayed, and you can use it to upload source files.

When set to No:

- In the Add/Update Source File page, the flashlight icon (used to launch the LOV for content repository) is NOT displayed.
- In the Add/Update Source File page, the Upload File button is NOT displayed.
- The Content Repository tab is still displayed. But when user selects the tab, an error message displays.

Note: The profile options IBE: Use Content Management Integration and IBE: Use Database for Media Storage should be set to "Yes" since integration with Oracle Content Manager is mandatory.

Updating Source Files

After a source file has been uploaded to the Content Repository, you can update it (replace it) with a newer version.

To update a source file, log in to the Site Administration Application and select Content, then Content Repository (select source file), then Update, then Browse for the file.

Note about Secured checkbox: This optional field applies security to the attachment. 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.

Uploading Source Files

To upload a new file to the Content Repository log in to the Site Administration Application and select Content, then Content Repository, then Upload Source File, then Browse for the file.

See the section above for information about the Secured checkbox.

Implementing Pricing

This chapter covers the following topics:

- Overview of Implementing Pricing Chapter
- Pricing Functionality Overview
- Price Lists Overview
- Pricing Qualifiers Overview
- Pricing Modifiers Overview
- Pricing Agreements
- Customer Account Price Lists
- Creating Price Lists

Overview of Implementing Pricing Chapter

This chapter contains information on how to implement price lists and other pricing features for an Oracle iStore implementation.

Pricing Functionality Overview

Oracle iStore displays prices for site products in both the catalog pages and the shopping cart. All item prices are retrieved from price lists; thus, every Inventory item for sale in your sites must appear on at least one price list. You can create price lists in Oracle Order Management Suite's Basic Pricing module, which is included in your purchase of Oracle iStore. Using Oracle Advanced Pricing, a separately licensable product, you can enhance the range of pricing functionality in your sites. In addition, you can use qualifiers and modifiers to alter the list price of items based on specific parameters. By setting a profile option, you can specify whether the Pricing Engine retrieves site-specific price lists or retrieves the best price from any available price list.

Oracle iStore caches prices in the catalog for site-based price lists and guest users. In the

shopping cart, which retrieves prices through Oracle Order Capture, prices are not cached.

Note that this guide contains summarized pricing information and data specifically related to Oracle iStore. For complete pricing information, consult the following guides:

- Basic Pricing - *Oracle Order Management Implementation Manual*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

Pricing Terminology

The following definitions of common pricing terms can assist your understanding of Oracle Pricing functionality.

- **Best Price:** The best price is determined when the pricing engine searches through all qualifying price lists to find the best price for the customer (could either be lowest price or lowest precedence price). To use best price in Oracle iStore, set the IBE: Use Price List Associated with Specialty Site profile option to No.
- **Context:** A data source used by Oracle Advanced Pricing to obtain attributes. For example, Oracle Advanced Pricing considers the customer order itself to be a context. Various attributes from the order, such as order date, can be used by Pricing to control the selection of a price or modifier.
- **List Price:** The base price per unit of the item, item category, or service offered. You define the list price on a price list. All price adjustments are applied against the list price.
 - Note that through the use of the permission, IBE_VIEW_NET_PRICE, you can control whether B2B users see only List Price or also prices with discounts and net prices; see the appendix, Seeded User Data, page B-1, for details.
- **Modifier:** Modifiers enable you to set up price adjustments (for example, discounts and surcharges), benefits (for example, coupons), and freight and special charges that the pricing engine applies immediately to pricing requests or accrues for later disbursement.
- **Precedence:** Used by Oracle Pricing to resolve Incompatibility. Precedence controls the priority of modifiers and price lists. If a customer qualifies for multiple modifiers that are incompatible with each other, precedence determines the discount that the customer is eligible for based on the precedence level of the modifier. The lowest level (lowest number) precedence receives the highest priority.
- **Pricing Event:** A point in the process flow of a pricing line (for example, an order or a contract) at which a call is made to the pricing engine to fully or partially price the order.

- **Qualifier:** A pricing attribute which the pricing engine uses to determine who can receive a particular price, discount, promotion, or benefit. Qualifiers and qualifier groups can be linked to price lists and modifiers.
- **Request Type:** Used to identify the transaction system that calls the pricing engine for price calculations (for example, Oracle Order Management or Oracle Order Capture).
- **Selling Price:** Price derived after applying price adjustments to the list price. In the Oracle iStore Customer Application, this can display as "Your Price" in the catalog.
- **Sourcing Rules:** Sourcing rules are used by Oracle Pricing for binding attribute values for attributes defined in a qualifier or pricing context.

Basic Pricing Versus Advanced Pricing with Oracle iStore

Using Basic Pricing a price list can contain:

- Pricing formulas
- Pricing agreements
- Basic discounts
- Freight and logistic charges

Using Advanced Pricing, a price list can contain:

- Volume breaks
- Item or item hierarchy structure
- Simple or complex formulas
- Dynamically calculated prices
- Percentage, fixed and/or lump sum discounts and/or surcharges
- Customized qualifiers
- Qualifier sourcing rules
- Deals
- Promotions

Best Price and Site-Based Price List Scenarios

Oracle iStore retrieves price list information in one of two scenarios, depending upon the value of the profile option, IBE: Use Price list Associated with Specialty Site.

- If the profile option is set to Yes, Oracle iStore retrieves prices from the site-based price lists specified in the Site Administration Application Pricing page for four main user types: B2C, B2B, Guest, and Partners. This is also called site-based pricing. In this case, Site ID is passed to the Pricing Engine.
- If the profile option is set to No, Oracle iStore passes a null price list, with Party ID, Account ID, and Site ID to the pricing engine. In this case, the pricing engine searches through all eligible price lists to determine the "best price" for which the user qualifies.

See the appendix, Profile Options, page A-1, for more information on this profile option.

Note that when using this method, prices are not cached in the catalog -- therefore performance will diminish.

The only exception to this rule is for walk-in/guest users. Regardless of the value set for IBE: Use Price List Associated with Specialty Site, for walk-in users, the default price list is always determined by the price list set in the Site Administration UI. In addition, guest users always see the cached prices.

Note: Depending on the Incompatibility Resolve Code setup in the Event Phases, the pricing engine uses either the lowest price or the lowest precedence (lowest number) value per item to get the best price.

Other Pricing Profile Options

For details on other profile options used in the pricing process, see the following sections of the appendix, Profile Options, page A-1: "Customer UI Pricing Profile Options" and "Customer UI Mandatory Setup Profile Options".

Price Lists Overview

Price lists are essential to ordering products because each item entered on an order must have a price, and item prices always come from some price list. Each price list contains basic list information and one or more pricing lines, price breaks, pricing attributes, qualifiers, and secondary price lists. Basic price list information includes the price list name, effective dates, currency, pricing controls, rounding factor, and shipping defaults, such as freight terms and freight carrier.

Price lists can be tied to modifiers and qualifiers, giving you the ability to offer discounts, promotions, and deals to your customers -- or to automatically add freight charges or surcharges to an order.

You can define the following types of prices on price lists:

- **Unit price:** A fixed price
- **Percent price:** A price which is a percent of the price of another item
- **Formula:** Multiple pricing entities and constant values related by arithmetic operators. For example, you define the price of an item to be a percentage price of another price list line.
- **Price break:** If the price of an item varies with the quantity ordered, you can define bracket pricing or price breaks.

Multiple-Currency Price Lists

In addition to single-currency price lists, Oracle iStore supports price lists in multiple currencies. Multiple-currency price lists reduce maintenance costs if you are doing business in more than one currency, because all items in all currencies can be contained and maintained within a single source price list.

Following are some key points of multiple-currency price list support:

- When the merchant creates a price list, he specifies one *base currency* for the price list, and any number of *converted currencies*. All of the converted currencies use the base currency as their basis.
- In Oracle iStore, when a pricing request is made, the pricing engine converts the price on the base price list to the ordering currency and returns the new price in the ordering currency to the Customer Application.
- Oracle iStore supports catalog caching of both prices in the base currency and the other currencies on the price list.
- When a user changes the currency in the Customer Application, the catalog gets refreshed with the prices in the selected currency (known as *session currency*), and the shopping cart also is re-priced in the session currency. This scenario works both in site-based pricing, as well as best pricing.
- In the Site Administration Application Search and Select: Currencies page, Oracle iStore retrieves not only base currencies, but also the converted-to currencies based on the currency conversion setup, providing multi-currency price lists are enabled.
- In the Site Administration Application Search and Select: Price Lists page, Oracle iStore retrieves all price lists which have the selected currency either as a base currency or converted-to currency, providing multi-currency price lists are enabled.

The Global Bin is used in the Customer Application to allow switching of currencies -- see the chapter, *Implementing Initial Customer Application Pages*, page 6-1, for more

information on the Global Bin.

High-Level Steps to Set up Multi-Currency Price Lists

Important: Once you convert your data structure to enable multi-currency price lists, you cannot revert back to single-currency price lists.

To set up multiple-currency price lists:

1. Ensure that each currency you plan to use has been set up. See the *Oracle General Ledger User Guide* for more information.
2. Set the Oracle Pricing profile option, QP: Multi-Currency Installed, to Yes at the site level.
3. Run the Oracle Pricing concurrent program to convert existing single-currency price lists to multi-currency: Run (one time) the concurrent program, Update Price Lists with Multi-Currency Conversion Criteria. The program creates a currency conversion list for each combination of price list currency and rounding factor, and attaches a currency conversion list to each price list and agreement. This is a mandatory step, since without this the pricing engine cannot use the current price lists as multi-currency price lists.

Note: You only need to run this program if you are **not** implementing a fresh install of Oracle Applications.

4. Set the profile option, QP: Multi-Currency Usage, to Yes at iStore application level.
Note: Ensure that other Oracle applications which use price lists and which you are integrating with also have the same setting for this profile option.
5. Create or update a base currency price list and attach the conversion list to it. In Oracle Pricing, set up Currency Conversion Rates (Price Lists > Multi-Currency Conversion Setup) and, optionally, currency specific markup/markdown equations.

For information about how to set up price lists, see the "Creating Price Lists" section, in this chapter.

1. After you set up price lists, you must assign price lists to specific sites using the Oracle iStore Site Administration Application. Assigning price lists is covered in the chapter, *Implementing Site Management*, page 5-1.

Refer to the *Oracle Advanced Pricing Implementation Guide* for additional information on the pricing functionality described above.

Pricing Qualifiers Overview

Pricing qualifiers can modify an item's price based on various criteria, such as site name, item number, or quantity. Once the qualifiers are set up and associated to a price

list, in most cases, the price change is automatically applied by the pricing engine, either in the Customer Application catalog or the shopping cart.

After you tie qualifiers to price lists, the attributes are used to pass specific data (for example, information about a customer, an item, or an order) to the pricing engine, and then to apply the price change. Qualifiers also can be tied to modifiers to provide List Price/Your Price discounts. In addition, pricing qualifiers can be grouped into *qualifier groups* and these groups also can be tied to price lists.

See the following sections within this chapter for more information:

- "Pricing Qualifiers Supported by Oracle iStore"
- "Oracle iStore Site as Pricing Qualifier"

For detailed information on pricing qualifiers, see the *Oracle Advanced Pricing User Guide*.

Pricing Qualifiers Supported by Oracle iStore

All of the pricing qualifiers that are supported by Oracle iStore are supported at the shopping cart level -- but in the catalog pages, a only subset these supported attributes are available to the pricing engine.

The following table shows the pricing attributes supported in the Customer Application. The table also shows the context for the attributes, whether they are supported in the catalog in addition to the shopping cart, and whether they are supported at item level (also known as line level) or cart level (also known as order or header level). Remember, all of the following are supported in the shopping cart; some are only supported in the catalog. Customer contexts are supported in a Best Price scenario only.

Oracle iStore Supported Pricing Qualifiers

Context	Attribute	Catalog Support?	Supported Level(s)
Customer	Customer Name	Yes	Item and Cart levels
Customer	Customer Class	Yes	Item and Cart levels
Customer	GSA	Yes	Item and Cart levels
Customer	Account Type	Yes	Item and Cart levels
Customer	Party ID	No	Item and Cart levels

Context	Attribute	Catalog Support?	Supported Level(s)
Customer	Sales Channel	Yes	Item and Cart levels
Customer	Agreement Name	No	Item and Cart levels
Customer	Agreement Type	No	Item and Cart levels
Customer	Bill To (site)	No	Item and Cart levels
Customer	Invoice to Party Site	No	Item and Cart levels
Customer	Ship To (site)	No	Item and Cart levels
Customer	Ship To Party Site	No	Item and Cart levels
Customer	Site Use	No	Item and Cart levels
Item	Item Number (inventory_item_id)	Yes	Item level only
Item	ALL_ITEMS (all items being priced)	Yes	Item level only
Item	Item Category (determined by inventory_item_id)	No	Item level only
Item	iStore Section	No	Item level only
Item	Segments 1-20 (key item flexfield segments)	No	Item level only
Minisite	Minisite_ID	Yes	Item and Cart level
Modifier List	Price List	Yes	Item and Cart levels
Modifier List	Promotion Number (Promo Code)	No	Item and Cart levels
Order	Line Category	No	Item level only

Context	Attribute	Catalog Support?	Supported Level(s)
Order	Line Type	No	Item level only
Order	Customer PO	No	Item and Cart levels
Order	Order Category	No	Item level only
Order	Order Type	No	Item and Cart levels
Order	Request Date	No	Item and Cart levels
Order	Pricing Date	No	Item and Cart levels
Order	Shippable Flag	No	Item and Cart levels
Pricing Attribute	Parent List Price	No	Item level only
Pricing Attribute	Model ID	Yes	Item level only
Segment	Market Segment	No	Item and Cart levels
Segment	Target Segment	No	Item and Cart levels
Terms	Shipping Terms	No	Item and Cart levels
Terms	Payment Terms	No	Item and Cart levels
Territory	Sales Territories	No	Item and Cart levels
Volume	Line Volume	Yes	Item level only
Volume	Line Weight	Yes	Item level only
Volume	Order Amount (sum of the list prices on all active order lines)	No	Cart level only
Volume	Item Amount	No	Item level only
Volume	Item Quantity	No	Item level only

Context	Attribute	Catalog Support?	Supported Level(s)
Volume	Period1 Item Quantity	No	Item level only
Volume	Period2 Item Quantity	No	Item level only
Volume	Period3 Item Quantity	No	Item level only
Volume	Period1 Item Amount	No	Item level only
Volume	Period2 Item Amount	No	Item level only
Volume	Period3 Item Amount	No	Item level only

Oracle iStore Site as Pricing Qualifier

You can use an Oracle iStore site as a pricing qualifier, with the following features:

- Different sites can have different prices, discounts, or promotions for the same Inventory item, while utilizing the same price lists
- Supported in single-organization as well as multiple-organization scenarios
- Supported in both best price and site-based price list scenarios

Using site as a qualifier is supported at cart and item levels, and is supported both in the catalog and cart/checkout phases of an order.

Setting up Site as Pricing Qualifier

You set up this qualifier in pricing just as you would any other qualifier, selecting Minisite as the Context and Minisite_ID as the Attribute. Minisite_ID will be the Site ID of the site.

To enable the use of site as a pricing qualifier, you must also set the profile option, IBE: Use Site As Pricing Qualifier, to Yes, at the iStore application level. The default value is No.

Other Guidelines

Here are some other guidelines to keep in mind:

- With the exception of merged items, qualifier prices are based on the price list in the

site where the item was added to the cart.

- In a multiple-site situation, if IBE: Merge Shopping Cart Lines profile is enabled, Oracle iStore will merge the lines and apply the price of the product from the site most recently accessed. See the chapter, *Implementing Carts and Orders*, page 13-1, chapter for more information on this profile option.
- B2B users must have the IBE_VIEW_NET_PRICE permission in their user role in order to see discount prices. See the appendix, *Seeded User Data*, page B-1, for details on this permission.
- If a user accesses the shopping cart from any other site except where it was created, the prices in the shopping cart will not be updated by the pricing engine unless the user performs some activity which causes cart to get updated/activated. See chapter, *Implementing Carts and Orders*, page 13-1, for more information about how a cart can be updated.
- In the case of site-published quotes that can be modified by a user, if no site name is known at item level, the site name will be populated at cart level based on the site where the quote was published.

Use Cases

The following use cases can aid your understanding of this functionality.

Use Case 1

- **Business Justification:** Site for Web specials
- **Setup:** One operating unit (OU), one site

Discount is defined as a modifier and site name as a qualifier defined in Pricing.

- **User Flow:**
 - User adds items to shopping cart from catalog.
 - All items use the same price list (site-based price list) except for the ones for which any pricing agreements have been applied in the shopping cart.
 - The site name is stored at the item (line) level. Item-level site name is passed to Pricing as a qualifier, and discounts will be applied as set up in Pricing.

Use Case 2

- **Business Justification:** One price list (potentially); different discount schedules per site
- **Setup:** Multiple OUs, one site per OU

Discount is defined as a modifier and site name as a qualifier defined in Pricing.

- **User Flow:** Same as in Use Case 1.

Use Case 3

- **Business Justification:** Site for specials: one regular site and one refurbished site. Refurbished site has X percent off. User can place items from both sites in one order. Promotion goods are applicable to selected sites. Site can be used as a qualifier, where certain promotions are not valid in some sites (e.g., a buy-1-get-1 free promotion may be allowed in B2C site but not in B2B site).
- **Setup:** Multiple sites per OU

Discount is defined as a modifier and site name as a qualifier defined in Pricing.

- **User Flow:**
 - User adds items to cart from Site A, which offers 10 percent off.
 - Site name is populated at cart (header) as well as item (line) level. Site price list is used for all lines, unless a pricing agreement is specified.
 - User adds items to cart from Site B (zero percent off).
 - iStore passes the item (line) level site name and Site B price list to Pricing, which results in 10 percent off on items which were from Site A and zero percent off on products from Site B.

Preconditions ---

- Price lists can be same/different; all items can be on one or both price lists.
- Site A has 10 percent off, for Site B, either it didn't qualify for any discounts or there were no modifiers setup for it
- Items published are mutually exclusive to Site A and Site B.

Use Case 4

- **User Flow ---**
 - User adds items X1 and X2 to cart from Site A, which offers 10 percent off.
 - Site name is populated at cart (header) as well as item (line) level. Site price list is used for all lines (unless pricing agreement is specified).
 - User adds X1 and Y1 to cart from Site B (offering 5 percent off) and Merge lines in shopping cart profile is set to Yes.

- Assume the price is different in both the sites for the X1. iStore will pass (via ASO) to QP: Site B minisite for the combined X1s (hence, quantity is 2).
- User will see following:
 - X1, quantity 2, Site B, price list 2, discount of 5 percent
 - X2, quantity 1, Site A, price list 2, discount of 10 percent
 - Y1, quantity 1, Site B, price list 2, discount of 5 percent
- **Preconditions** ---
 - All items are on both price lists.
 - Site A has 10 percent off, Site B has 5 percent off

Use Case 5

- **Business Justification** --- Sites with "best pricing" options

All the above scenarios are valid. Users can add items to shopping cart; all items can have the different/same item level price list. In this case, discount will be calculated based on site from where the item was added. In this scenario, guest user will see list price in catalog, as best price is calculated after the user signs in.

Pricing Modifiers Overview

Modifiers are pricing actions that drive your pricing processes in addition to price lists, formulas, and agreements. Modifiers can adjust net price either up or down. Modifiers enable you to set up price adjustments (for example, discounts and surcharges), benefits and promotions (for example, coupons) and freight and special charges that the pricing engine applies immediately to pricing requests or accrues for later disbursement.

To create a price list that contains a discount, use the Discount List Modifier. This enables you to display a different price for List Price/Retail Price and Your Price in the Customer Application. These prices appear next to the product in the catalog pages. The value for List Price is from the basic price list, while the value for Your Price is the basic price list plus the associated discount list modifier. For steps detailing how to set up a 0discount modifier, see the section, "Creating Price Lists with Discount Modifiers", within this chapter.

Pricing modifier functionality also can be used to set up promotion codes in Oracle iStore. See the chapter, *Implementing Carts and Orders*, page 13-1, and the *Oracle Order Management Implementation Manual* for complete details.

Order Management Suite's Basic Pricing module includes discount list modifier functionality. Although the discount is created using basic pricing, it must contain specific attributes to function properly in Oracle iStore.

For more information, see the *Oracle Order Management Implementation Manual* and the Oracle Advanced Pricing documentation.

Promotion Code Modifiers

Setting up promotion codes for Oracle iStore involves the following high-level process:

1. **Set up promotion code in Oracle Order Management:** Set up a modifier of type "Promotion". The modifier must also be marked as "Automatic" and "Ask for". See the *Oracle Advanced Pricing Implementation Guide*, "Modifier Type Setup" section, for more information.
2. **Set iStore promotion code profile option:** The profile option, IBE: Use Promotion Code, enables/disables the appearance of the Promotion Codes link in shopping cart. For more information on this profile option, see the appendix, Profile Options, page A-1, in this guide. More information on cart behavior and promotion codes can be found in the chapter, Implementing Carts and Orders, page 13-1.
3. **Ensure setting of B2B user permission:** B2B users must have the IBE_VIEW_NET_PRICE permission to use promotion code functionality.

Promotional Goods Modifiers

Promotional goods (PRG) modifiers allow you to automatically add buy-one-get-one-free items when users purchase another item. They also allow you to offer discount products in your sites.

PRG Terminology

The following PRG terminology may aid your use of this feature:

- **Promotional Good (PRG):** The item that is automatically added to the cart if the qualifying item is added to the cart
- **Qualifying Item(s):** The item that must be added to the cart in order for the PRG to be received

Setting up PRGs

In addition to the Oracle Pricing setups, the following are the steps/guidelines specific to Oracle iStore:

1. **Ensure Pricing Event Phase:** When setting up PRGs, ensure that they are in the pricing All Lines Adjustment event phase.
2. **Modifier Level Setting:** Be sure to set the modifier at the Line Group level. If set at the Line Level, when a customer splits a qualifying item, the quantities of the

promotional item and the qualifying item will not remain consistent.

3. **Point or Range Setup:** Implementers can set up the PRG modifier in Oracle Pricing in two ways:
 - Point --- Irrespective of quantity of qualifying item, always give x quantity of PRG.
 - Range --- Depending on quantity of the qualifying item, give y quantity of PRG. For example: If a user buys item A, he will get 2 of PRG item B. If the user buys 2 of item A, he will get 4 of PRG item B.
4. **Add PRG Information to Products or Sections:** By default, the Oracle iStore catalog does not differentiate between promotional/qualifying goods and non-promotional/non-qualifying goods in terms of how these items display. Therefore, if you wish customers to recognize a PRG/qualifying item in the catalog, you must manually tell customers that such an item exists. One way to do this is to add the PRG/qualifying information directly into the item name or description. Another way would be to create a specific section populated with the applicable PRG/qualifying items and then label the section accordingly.

PRG Rules, Guidelines, and Behavior

The following rules, guidelines, and behavior apply to PRG functionality with Oracle iStore:

- Display in carts: PRGs are always the last set of line items in the cart, with a visual indicator that resembles a price tag. When a user does a mouse-over, the PRG displays its information -- for example, "Promotional item for qualifying item 1, item 2". PRG items appear in saved carts, shared carts, and order review pages with the visual indicator and mouse-over information.
- Order Tracker display: In Order Tracker, PRG items appear as any other item.
- Qualifying products: Qualifying products can be an item, item category, or all items. Merchants can define a single qualifying item as an item, an item category defined in Inventory, or any item added to the shopping cart.
- Ability to get PRG by having sum of quantity of qualifying items in cart: The customer can add qualifying items from the catalog to the cart multiple times with different quantities. The sum of the quantity of qualifying items determines if the PRG criteria are met or not. If yes, the PRG is added to the cart.
- When are PRG items added to the cart: If the modifier is set to be automatic in Oracle Pricing, then as soon as user adds the qualifying item to the cart, a new cart line is created for the PRG. If the modifier is set up as "ask", then only when the end user provides the promotion code is the PRG added to the cart.

- To enable the Promotion Code link in the Your Shopping Cart page, set the profile option, IBE: Use Promotion Code. Note that in addition to any required merchant setups, B2B users must have the IBE_VIEW_NET_PRICE permission in their user roles to access promotion code functionality.
- Add/Remove promotional goods from cart as quantity of qualifying items changes: If the quantity of the qualifying item is changed, then the PRG is added/deleted as per the definition in the Oracle Pricing modifier screen. See Scenario 4, under the section, "PRG Use Cases", below, for an example.
- Configured items as qualifying items: When the pricing engine is called from Oracle Configurator, PRGs are not returned to the cart at that time. When the configured item is a qualifying item, only when the user completes the configuration session are the configuration items added to the cart. At this time, a full pricing call is made. The PRG will not be part of the configuration, but will be a separate line.
- Configured items as PRGs: Users can add a qualifying item to the cart (for example, flowers). A PRG (for example., a birthday card) can be added to the cart, and the user can select Reconfigure to add text to the card; however, he cannot delete or add new components to the configuration. If the user adds a qualifying product, and a configurable product is the PRG, the user can reconfigure the product and get x percent off the whole configuration.
- Price list of PRG line: Merchants can select the price list for the PRG in the Define Modifier screen. The price list for the cart line is the price list set for the PRG in Oracle Pricing. The list price on the cart is the price from this price list. No issues arise with site-based pricing, nor with best pricing, as Oracle iStore always uses the price list as defined in the modifier definition.
- Restrict changes to item information: Customers cannot change the item, quantity, or UOM of the PRG line.
- Pricing agreements: Oracle iStore does not apply any pricing agreements to PRG lines. Since pricing agreements can be attached to commitments, customers cannot pay for PRGs with commitments. Oracle iStore does not show PRGs in the pricing agreements screen in the shopping cart, nor in the commitments screen from the billing page during checkout.
- Deletion of PRG items: Customers can delete PRG items, just as with any other item in the cart. Once the user has deleted the PRG, it will not automatically appear again. The customer must delete the qualifying line and then add the same again to retrieve the PRG item again. However, if the user deletes the PRG for a qualifying line and adds a new qualifying line, and the profile option, IBE: Merge Shopping Cart Lines, is No, then the PRG will also get added to the qualifying item.
- Automatic removal of PRGs: If a customer deletes the qualifying item, the PRG is automatically removed from the cart. If more than one required qualifying item

exists and the user deletes any of them, the PRG also is automatically removed from the cart.

- Available To Promise (ATP) checks: Customers can do ATP checks on PRG items.
- Descriptive Flexfields (DFFs): PRG items can be used with DFFs.
- Entering bill-to information: Customers can enter item-level bill-to information for PRGs.
- Ability to enter line-level ship to information: Customers can enter line-level ship to information for PRGs, provided the functionality is set up.
- Returns: Customers can search for and select items which were received as PRGs. For a referenced return, Oracle Order Management doesn't enforce that the PRG line must be returned with the buy line. Also, Oracle Order Management allows the return of PRG lines. Oracle iStore allows users to return qualifying items as well as PRGs, providing merchants have set up the functionality appropriately. Merchants can determine their own rules for returning PRGs and qualifying items. Users can order qualifying as well as promotional goods and may need to return one or more items. Depending upon merchant policy of returns, there can be various scenarios.
- Viewing tax information: Customers can view line-level tax information with PRGs.
- Promotions: Cart-level adjustments can be applied to PRGs. Item-level adjustments will be applied to PRGs only if they are defined in a pricing phase with the Freeze Override flag as Yes. Currently, line-level adjustments are done as a result of deep linking.
- Service items: Merchant can define a service item as the qualifying good for a serviceable item that is the PRG. However, as Oracle Pricing does not currently support it, merchants cannot offer service items as the PRGs in an order.
- Shopping lists: PRG items cannot be copied to shopping lists.
- Express Checkout: If a user does an Express Checkout for a qualifying item, the related PRG will also get ordered and will be visible on the Express Checkout pending orders page.
- Merging items: The profile option, IBE: Merge Shopping Cart Lines, is ignored for PRG items. PRG lines are read-only and can have prices different from normal lines -- therefore, PRG lines and non-PRG lines items for the same item are not merged.
- Validate PRG quantity in cart as set up in PRG modifier: Customers can add qualifying items to a cart. Based on the setup in Oracle Pricing for the PRG (either for point or range) the correct quantity for promotion good will be shown in the cart. The same check occurs when the items in the cart get merged.

- Restrict PRGs by sites: Merchants can set up some promotions to not apply in some sites. Site as a pricing qualifier can be used in this scenario.
- Expired modifiers: PRGs are deleted from the cart if the modifier is expired. If a user adds a qualifying item to the shopping cart and a PRG also is added, but later the user updates the cart and the PRG is no longer active, the PRG is deleted from the cart.
- Currency re-pricing: On a change of currency, PRG items also are re-priced in the new currency. For example, a user adds items to a cart with a session currency of USD. When the user changes the currency to Euro, all items in the cart (including PRGs) will be re-priced in the new currency.
- Navigation to catalog: PRG items expose a hyperlink that allows the user to navigate to the catalog.

PRG Use Cases

The following use cases can aid your understanding of the PRG feature:

- **Scenario 1: Buy one computer, receive one free mouse:**

If the customer adds a computer to the cart, as soon as the pricing engine is called, a new line is created for the free mouse item. The user should not be able to change the item, quantity, or UOM of the PRG.

The price list for the line should be the price list set for the PRG in Oracle Pricing. The list price on the cart should be the price from this price list.

The user should be able to delete the PRG.

Any freight charges for the PRG should be returned by pricing and added to the cart.

If the user deletes the computer, the mouse should automatically be removed from the cart.

- **Scenario 2: Buy one computer and one keyboard and receive one free monitor:**

All requirements from Scenario 1 are valid for this scenario. In addition, if the user deletes either the computer or the keyboard, the monitor should be automatically removed from the cart.

- **Scenario 3: Buy a telephone and one year of phone service and receive one free cell phone:**

All requirements from Scenario 1 are valid for this scenario. Currently, the pricing engine doesn't support attaching services to PRGs, and Oracle iStore currently only allows users to buy services for a serviceable item with a reference to an existing order line. Hence, merchants can implement this functionality as, "Buy 1 computer and 1 year extended warranty" and get a printer for a 50 percent discount. In this case, the computer and extended the warranty together are the qualifying items.

Note that Oracle iStore must have the quantity of the qualifying item and promotion item the same.

- **Scenario 4: Add/Remove promotional goods from cart as quantity of qualifying items changes:**

For example, if the merchant has set up the following:

Qualifying item: Computer (Quantity: 2)

PRG item: Printer (Quantity: 1)

Steps:

1. The user adds one computer to the shopping cart.
2. The user increases the quantity of computers to two. Printer gets added to cart.
3. User decreases the quantity of computers to one. Printer gets deleted from the cart.
4. User increases the quantity of computers to two. Printer gets added to cart.

Pricing Agreements

Pricing agreements define the price list of the items in the cart and provide mechanisms to derive discounts. Agreements can be universal or customer-specific -- however, Oracle iStore does not support universal agreements unless previously added to a quote through an integration with Oracle Quoting.

Oracle iStore makes pricing agreements available as an action from the shopping cart. The Pricing Agreements action retrieves the Pricing Agreements page, where customers can assign available pricing agreements at the cart or item level. For information on how agreements display in the shopping carts, see the chapter, Implementing Carts and Orders, page 13-1.

General Pricing Agreement Guidelines

Consider these guidelines as you implement pricing agreements:

- When a pricing agreement is retrieved in the Customer Application, only the price list attribute is passed in with the agreement. In addition, agreements will only display which are in the customer's session currency and Account ID.
- Each pricing agreement can only have one price list assigned to it. However, one price list can be linked to multiple agreements.
- Oracle iStore supports two types of agreements:
 - **Standard Agreements:** Standard Agreements use standard price lists. Price list

lines are set up and maintained through the Price List setup form. Use Standard Agreements to define special terms and conditions that are defaulted onto the order, but that use prices available to other orders. Standard Agreements can be generic or can be specific to a customer or customer group.

- **Pricing Agreements:** Pricing Agreements use Agreement Price Lists. These price lists are set up and maintained through the Agreements form. Use Pricing Agreements to set up special pricing arrangements with either a customer or a group of customers. This type of agreement also supports special terms and conditions that are defaulted onto the order.
- B2B users must have the IBE_USE_PRICING_AGREEMENT and IBE_VIEW_NET_PRICE permissions to use agreements.

For information on implementing pricing agreements, see the *Oracle Order Management Implementation Manual* .

Item-Level Agreements

B2B customers can select pricing agreements in a shopping cart at item level. To enable item-level agreements for B2B users, set the profile option, IBE: Use Line Agreements, to Yes at iStore application level.

If a B2B user is assigned the permission, IBE_USE_PRICING_AGREEMENT, and the profile option, IBE: Use Line Agreements, is set to Yes, the user can set cart and item-level agreements.

Note that service items and promotional items are not candidates for item-level agreements.

If a pricing agreement is assigned at the item level, the price will be retrieved by the corresponding price list. Otherwise, Oracle iStore will use the price list associated to the pricing agreement assigned at the cart level.

Commitments

In a B2B scenario, users can use commitments to complete the billing process. To enable commitments in your sites, set the profile option, IBE: Use Commitments, to Yes at the iStore application level.

Commitments can be associated with an agreement. Thus, the agreement and corresponding price list can get pulled for the line, even if users do not have permission and the agreement profile is turned off. If those are off, then users will not be able to set agreements on the commitment page, but the agreements tied to commitments will still be pulled in, and so will the corresponding price list.

Customer Account Price Lists

The Customer Account Price Lists feature allows implementers to display, in the Customer Application catalog, products and prices from price lists tied to a customer. This feature is implemented as an iStore profile option, along with Oracle Pricing setups.

Customer Account Price Lists Functional Flow

Following is the functional flow for catalog logic when using the customer account price lists feature:

1. If the customer account profile option is Yes and the price list can be located, the application retrieves and caches the account-level price list, and displays these prices in the catalog.
2. However, if the price list cannot be located, the application checks the value of the site-based price lists profile, IBE: Use Price List Associated with Specialty Site.
 - If the site-based price lists profile is Yes, the application retrieves and caches the price list specified for the site, and displays these prices in the catalog. If it cannot retrieve this price list, the application sets the price list to null, and no prices are retrieved.
 - If the site-based price lists profile is No, the application sets the price list to null, and no prices are retrieved.

Implementing Customer Account Price Lists

Use the following steps to implement customer account price lists:

- Step 1 - Set Profile Option
- Step 2 - Link Customer to Price List

Step 1 - Set Profile Option

The profile option, IBE: Use Customer Account Price List, controls whether the customer account price lists feature is available to the runtime catalog. Set at site level to Yes to use the feature. The default value is null, which is treated as No.

Note that specific behavior is exhibited when using this profile option with the site-based price lists profile option, IBE: Use Price List Associated with Specialty Site. See the following table for more information.

Behavior of Customer Account and Site-Based Price Lists Profile Options

IBE: Use Price List Associated with Specialty Site is. . .	And IBE: Use Customer Account Price List is. . .	Effective Price List will be. . .
Yes or Null	Yes	Customer account price list if existing, otherwise, site-based price list
Yes or Null	No or Null	Site-based price list
No	Yes	Customer account price list
No	No or Null	Best price from Pricing Engine

Note: Best price search should be enabled only when both of the above profile options are set to No. For other combinations of the above two profile option values, best price search is not supported and should not be enabled.

Step 2 - Link Customer to Price List

Steps

1. Set up a price list.
2. Link a customer to the price list. Refer to the *Oracle Advanced Pricing Implementation Guide* for steps.
3. Bounce the middle-tier and Web Cache servers.

Creating Price Lists

This section contains quick steps for creating price lists. See the pricing documentation listed in this section's Reference area for complete information.

Prerequisite

- Required currencies and languages are installed. See the chapter, *Verify Mandatory Dependencies*, page 2-1, and the *Oracle General Ledger User Guide*.

Steps

1. Log in to Oracle Forms as a user with access to the Pricing menus and navigate to the Price List Setup menu.

2. Navigate to the Price List form and enter required values. Use the points below as a guide; for complete information, see the Oracle Order Management and Oracle Pricing documentation.
 - Price List Name: Use a name that reflects the site implementation. For example, VISION_US_PL.
 - Description: Include a short description of the price list. For example, Euro price list for VISION_US implementation.
 - Currency: Choose a default currency. For example, choose DOL for the VISION_US_PL.
 - Multi-Currency Conversion: If multiple-currency price lists have been implemented, select the conversion price list for the price list you are creating.
3. Navigate to the List Lines tab and add products to the price list:
 - Enter Items in the Product Context field.
 - Search for and select products in the Product Value field.
 - Enter Prices in the Value field.
4. Save your work.

Guidelines

- Remember, if you are using different price lists for different sites, you should ensure that all items are listed on all price lists being used across your instance. Pricing errors will occur if a user places an item in a cart in one site, navigates to another site, and attempts to check out with an item which is not on the price list of the site where he is checking out.
- If you set up a price list to be operating unit specific, be sure to associate this price list only to sites whose associated customer responsibilities are linked to the OU where the price list is enabled.

Reference

- Basic Pricing - *Oracle Order Management Implementation Manual*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

Creating Price Lists with Discount Modifiers

This section contains quick steps for creating price lists with discount modifiers. See the pricing documentation listed in this section's Reference area for complete information.

Prerequisites

- Required currencies and languages are installed. See the chapter, *Verify Mandatory Dependencies*, page 2-1, and the *Oracle General Ledger User Guide*.
- Price list for discounts must contain:
 - Product Attribute value - **ALL_ITEMS**
 - Default currency reflecting the currency of site implemented

Steps

1. Log in to Oracle Forms as a user with access to the Pricing menus.
2. Navigate to the Define Modifier Form.
3. In the Main tab, enter the following fields:
 - In the Type field, enter Discount List.
 - In the Name field, enter a user-friendly name.
 - In the Currency field, choose a default currency for the modifier.
 - Check Active and Automatic.
4. In the Modifiers Summary tab, enter the following values:
 - In the Level field, choose Line.
 - In the Modifier Type field, choose Discount.
 - In the Start Date field, pick the start date that applies.
 - Check Automatic.
 - In the Pricing Phase field, choose List Line Adjustment.
 - In the Product Attribute field, choose ALL_ITEMS.
 - In the Volume type field, choose Item Amount.
 - In the Break Type field, choose Point.
 - In the Operator field, choose Between.
 - In the UOM field, choose Ea.

5. In the Discounts/Charges tab, enter the following values:
 - In the Formula field, choose Handling.
 - In the Application Method field, choose Percent.
 - In the Value field, enter your discount percentage amount.
For example, enter 10.
6. Save your work.
7. After creating the pricing modifier, to generate and display the correct prices, run the pricing concurrent program, Build Attribute Mapping Rules. Bounce the Application server after the concurrent program completes.
8. After running the Build Attribute Mapping Rules concurrent program, the price list is available in the Site Administration UI. Associate the discounted price list to a site. For more information, see the chapter, Implementing Site Management, page 5-1.

Reference

- Basic Pricing - *Oracle Order Management Implementation Manual*
- Advanced Pricing - *Oracle Advanced Pricing Implementation Guide*

Implementing Payment Types and Shipping Methods

This chapter covers the following topics:

- Overview of Implementing Payment Types and Shipping Methods Chapter
- Oracle iStore Payment Types Overview
- Credit Card Processing
- Payment Types Business Flows
- Credit Card Verification Number Support
- Credit Card Risk Management Support
- Credit Card Authorization for Entered or Booked Orders
- Statement Billing Address for Credit Cards
- Setting up Payment Types
- Using Payment Types Threshold
- Setting up Item-Level Billing
- Setting up Payment Commitments
- Setting up Shipping Functionality

Overview of Implementing Payment Types and Shipping Methods Chapter

This chapter contains information on how to implement payment types and shipping methods in Oracle iStore.

Oracle iStore Payment Types Overview

Oracle iStore allows you to configure several payment types for your sites. Each site can use different payment types. After being enabled in Oracle Payments and Oracle iStore,

site administrators select the desired payment type for each site in the Oracle iStore Site Administration Application. Following are the seeded payment types:

- CASH - Cash
- CHECK - Check
- CREDIT_CARD - Credit Card
- INVOICE - Invoice

Other seeded values (not payment types, but attributes of payment types) include:

- FAX_CC - Fax Credit Card
- PO - Purchase Order

The seeded values for credit card payment types are:

- AMEX - American Express
- CARTE - Carte Blanche
- DINERS - Diner's Club
- DISCOVER - Discover
- ENROUTE - Enroute
- JCB - JCB
- MASTERCARD - Master Card
- VISA - Visa

Note: Any payment method (channel) enabled on an Oracle iStore site must also be enabled as a payment channel within Oracle Order Management, for the operating unit against which the order will eventually be placed.

The Oracle Payments Role in Payment Methods

Oracle Payments (previously Oracle iPayments) centralizes the storage of payment information, including payment methods (e.g., credit cards, checks, etc.) and payment instruments (e.g., credit card numbers). Since Oracle iStore supports a few methods (PO*, Invoice and Fax_CC) that are outside the purview of Oracle Payments, the payment types used in Oracle iStore cannot be based solely on an Oracle Payments table/lookup. Thus, Oracle iStore uses its own lookup, IBE_PAYMENT_TYPE, to store the additional payment types that are unique to Oracle iStore but not present in Oracle Payments, *and* the payment types implementers wish to use in the sites. Implementers

must follow these rules when setting up payment types:

*PO is not an actual payment method, but rather an attribute of the payment.

- IBE_PAYMENT_TYPE is **not** intended to be user extensible. Custom payment types should not be added.
- Any Oracle iStore payment types defined in IBE_PAYMENT_TYPE must match those set up in the Oracle Payments (stored in the table, IBY_FNDCPT_ALL_PMT_CHANNELS_V).
- Any payment method enabled/disabled in Oracle Payments must also be reflected in the Oracle iStore lookup.
- For manual payment types (e.g., Cash, Check) the Oracle iStore lookup must also be in sync with the Oracle Payments lookup. An exception to this rule is the PO payment type, which is specific to Oracle iStore and hence will be present in the IBE_PAYMENT_TYPE lookup.

Note: At the end of the installation patching process, Oracle Payments automatically runs an Oracle iStore concurrent program, iStore Program to Migrate Credit Card Data to Oracle Payments. This concurrent program migrates the iStore data for primary and preferred credit card to the Oracle Payments model.

See the *Oracle Payments Implementation Guide* for additional information. Information on selecting payment types for sites can be found in the chapter, *Implementing Site Management*, page 5-1.

Credit Card Processing

Oracle Order Management, Oracle Payments, Oracle Receivables, and Oracle iStore work together to enable credit card processing. When a customer attempts to use a credit card in Oracle iStore, the system checks the value of the profile option, IBE: Perform Payment Authorization in iStore. When the profile is set to Yes, Oracle iStore calls an Oracle Payments API to authorize the credit card before creating the order.

If credit card authorization fails, Oracle iStore displays an error message and the order won't be created. If the authorization is successful, an order will be created.

If the profile is set to No, payment authorization is not done through Oracle iStore; rather, credit card authorization is performed in Oracle Order Management.

See the appendix, *Profile Options*, page A-1, for more information on the profile option.

Credit Card Processing Rules and Behavior

The following rules and behavior apply to this functionality:

- In the (rare) case when credit card authorization (handled within iStore) is a success, but Oracle Order Management order placement fails, there won't be a re-authorization when the order is placed again for the same shopping cart.
- The payment method for the shopping cart cannot be changed once the credit card associated with the shopping cart has been authorized. The cart could either be ordered or saved.
- If credit card authorization happens in Oracle iStore, risk validation checks will not be performed.
- The error message displayed when credit card authorization fails (based on the error code, Decline, from Oracle Payments) is: *Your credit card authorization was declined. Please contact customer service.* For all other error codes (for example, Communication Error, System Error, Setup Error) the following message is shown: *Error while processing the credit card.*
- Set IBE: Perform Payment Authorization in iStore to No if you are planning to use the publish quote flow and implementing line level credit cards at the same time.

See the Credit Card Risk Management Support topic, below, for information about a special scenario with the profile option, ASO: Credit Card Authorization, and risk management.

Payment Types Business Flows

This section contains business flows for payment types:

- Non-Credit Card Business Flow
- Credit Card Business Flow

Non-Credit Card Business Flow

The non-credit card business flow is:

1. Customer chooses a non-credit card payment type as payment method.
2. Checkout process is finalized and the order is placed through Oracle iStore.
3. Order information is passed to Oracle Order Management via Oracle Order Capture.
4. Oracle Order Management picks, ships, and delivers the order.
5. After shipment, Oracle Receivables handles payment remittance for applicable payment types.

Credit Card Business Flow

Credit card business flow is:

1. Customer chooses a credit card payment type as payment method.
2. Checkout process is finalized, and the order is placed through Oracle iStore.
3. Oracle iStore passes order information to Oracle Order Management.
4. Oracle Order Management can interface with Oracle Payments or other applications for credit card processing.

Oracle Payments integrates with third-party payment providers to authorize the credit card, and passes transaction results back to Oracle Order Management. See the *Oracle Payments Implementation Guide* for additional information.

5. If approved, Oracle Order Management picks, ships, and delivers the order. See the *Oracle Order Management Implementation Manual* for additional information.
6. After shipment, Oracle Receivables processes payment remittance. See Oracle Receivables documentation for more information.

Credit Card Verification Number Support

In today's e-commerce environment, companies are increasingly seeking ways to reduce credit card fraud and ensure secure online ordering for their customers. To address this need, Oracle iStore features close integration with Oracle Payments to provide merchants with the ability to require that their customers enter a Card Verification Value 2 (CVV2) during checkout.

Overview of CVV2

CVV2 is a 3- or 4-digit number printed on the back of credit cards. Requiring that customers enter this number during checkout helps ensure that the credit card is on hand during the order placement process.

CVV2 Process Flow

The business process flow is as follows:

1. A customer logs into an Oracle iStore site, adds items to shopping cart, and proceeds to checkout to place the order.
2. In the Payment and Billing Information page, the user enters the CVV2 number in the CVV2 field, located next to the credit card selection field.

3. The value the user enters is passed to an Oracle Payments API, along with the card number, name, address, and relevant information.
4. If the user inputs an invalid CVV2 number, the transaction fails and an error message displays in the Review and Submit Order page.

The following graphic shows how the CVV2 field might appear in the Payment and Billing Information page in an implementation of Oracle iStore.

CVV2 Field in Payment and Billing Information Page

The screenshot shows a web form titled "Payment". It has two radio buttons: "Invoice" (unselected) and "Credit Card" (selected). Below the "Credit Card" radio button is a dropdown menu with the text "Credit Card, xxxxxxxxxxxx1111, Expires 01/2006". To the right of the dropdown is a small icon of a card and the text "* CVV2:". Below the dropdown and icon is a text input field with a placeholder "0000".

Implementing CVV2

The CVV2 feature is implemented using Oracle Payments, a mandatory dependency for this feature. Implementers can set the field to be mandatory or optional. If CVV2 is mandatory, the Oracle iStore Customer Application displays an asterisk (*) next to CVV2 number field. Use the following steps to set up CVV2.

1. Ensure that credit card authorization is set up. See the *Oracle Payments Implementation Guide* and the "Credit Card Processing" and the "Credit Card Business Flow" sections within this chapter.
2. **To implement CVV2 as mandatory:** In the Oracle Payments Setup, System Security Options page, in the Credit Card Owner Verification Control area, set the Require Security Code Entry to Yes.
3. **To implement CVV2 as optional:** Set the Require Security Code Entry in Payments to No.

Additional Information: The CVV2 text field will always display in the Customer Application billing section, regardless of whether it is marked as optional or mandatory in Oracle Payments.

Rules and Guidelines for CVV2

Keep the following rules and guidelines in mind as you implement and use the feature:

- If CVV2 is mandatory, a credit card number does not get defaulted in the checkout flow. If CVV2 is optional, per Oracle iStore defaulting rules, a credit card number is defaulted into the cart when the cart is created.

- If CVV2 is mandatory, implementers should disable Express Checkout functionality, since Express Checkout places the order in one click, and the user will not be able to input the CVV2 number.
- If the user inputs the CVV2 number and navigates to any other page, and then comes back to billing page, the system will show the CVV2 number as masked. The user will be able to overwrite the CVV2 number in this case.
- The CVV2 number is encrypted and thus cannot be copied from one transaction to another. For this reason, when a user who has credit card information in the cart duplicates the cart or uses the Copy to Cart function from a quote, the following will happen:
 - If CVV2 is mandatory, then the credit card details and the CVV2 details will not be copied to the newly created cart. The payment type will be cleared as well.
 - If CVV2 is optional, then the credit card details will be copied to the newly created cart. The CVV2 details will not be copied to the newly created cart.

Refer to the *Oracle Payments Implementation Guide* for more information.

Credit Card Risk Management Support

With increasing numbers of credit card transactions online, merchants need a way to detect fraudulent transactions. Oracle iStore meets this need with its integration to the Oracle Payments Risk Management functionality.

Overview of Risk Management

Risk Management functionality allows businesses to have any number of predefined risk factors to verify the identity of their customers and assess their customer credit and risk ratings in a secure environment during real-time credit card authorization. Authorization returns an authorization code, and if Risk Management is enabled, a risk score. Risk scores range from zero to 100, with zero meaning a risk-free transaction and 100 meaning a high-risk authorization. If the risk score exceeds the risk threshold merchants have set up, the order is automatically placed on credit card high risk hold.

Risk Management Process Flow

The business process flow is as follows:

1. A user adds items to a shopping cart, proceeds to checkout, and places the order.
2. As part of credit card payment authorization, an Oracle Payments API is called to authorize the payment. At this time, Oracle Payments checks if risk management is enabled and evaluates the risk formula associated with the payee (customer). If the

credit card authorization fails, the order will not be placed, and the user is shown an error message -- if the credit card authorization is done by Oracle iStore. If the credit card authorization is done by Oracle Order Management and the authorization fails, then the order will be created and put on "payment hold". A message saying that the order has been put on hold will be displayed.

3. If the authorization succeeds, Oracle Payments returns the risk score obtained after evaluation, taking into account the threshold value implemented by the merchant. If the risk score is more than the threshold value, the payment request is deemed too risky, and the order is put on "payment hold". A message saying that the order has been put on hold will be displayed.

Implementing Risk Management

Risk Management functionality requires integration with Oracle Payments. Assuming Oracle Payments is implemented along with Oracle iStore, following is the high level process flow for implementing risk management:

1. Step 1 - Set Profile Options
2. Step 2 - Set up Risk Factors
3. Step 3 - Set up Risk Formulas

Step 1 - Set Profile Options

Set the profile option, ASO: Enable Risk Management on Credit Card Authorization, to Yes to enable the feature in Oracle iStore. See the appendix, Profile Options, page A-1, for more information on the settings of the profile option.

In addition, if business requirements dictate, set ASO: Credit Card Authorization to Yes and IBE: Perform Payment Authorization in iStore to No. Refer to the section, "Behavior Involving ASO: Credit Card Authorization Profile", below.

Note: Setting the profile options IBE: Perform Payment Authorization in iStore and ASO: Credit Card Authorization to Yes results in duplicate authorization. The values of these two profile options must be unique to avoid this behavior. If you have set the ASO: Credit Card Authorization profile option to Yes, then you must set the IBE: Perform Payment Authorization in iStore profile option to No.

Step 2 - Set up Risk Factors

Set up risk factors (e.g., time of purchase, transaction amount, ship-to/bill-to address, payment history) in Oracle Payments. See the *Oracle Payments Implementation Guide* for more information.

Step 3 - Set up Risk Formulas

Set up risk formulas based on above defined risk factors and a threshold value for the formula in the Oracle Payments Payee screen. The risk score is a value between 1 and 100, and represents the cutoff point, where the orders that get authorized with a higher risk factor will be placed on credit card high risk hold. The default is 50. For example, assume an order authorizes successfully, but returns a risk factor of 51. Since its risk code is above the threshold of 50, it will be placed on hold. See the *Oracle Payments Implementation Guide* for more information.

Express Checkout Integration

Express checkout orders also do the risk management checks, and if the risk score is more than the threshold, the order will be put on hold. In case of express checkout orders, profile options values used are for the iStore concurrent programs administrator. Hence, implementers should set the risk management profile values accordingly for the iStore concurrent programs administrator.

Refer to the *Oracle Order Management Implementation Manual* and the *Oracle Payments Implementation Guide* for more information.

Behavior Involving ASO: Credit Card Authorization Profile

Specific behavior occurs when the profile option, ASO: Credit Card Authorization, is Yes.

Scenario 1

- ASO: Enable Risk Management on Credit Card Authorization = No.
- ASO: Default Order State = Entered
- IBE: Perform Payment Authorization in iStore = No

When the above conditions are set, an order will be created in entered mode and authorization is performed at order creation time without risk validation.

Scenario 2

- ASO: Enable Risk Management on Credit Card Authorization = Yes
- ASO: Default Order State = Entered
- IBE: Perform Payment Authorization in iStore = No

In this case, credit card authorization will be performed with risk validation.

Credit Card Authorization for Entered or Booked Orders

By setting two profile options, merchants can configure Oracle iStore's integration with

Oracle Payments and Oracle Order Capture to specify whether credit card authorization occurs during the order state of Entered or Booked. These are discussed below.

1. To enable credit card authorization for orders created in Entered status, set the profile options as follows:
 - ASO: Credit Card Authorization = Yes
 - ASO: Default Order State = Entered
2. To enable Credit Card Authorization for orders created in Booked status, set the profile options as follows:
 - ASO: Credit Card Authorization = No
 - ASO: Default Order State profile = Booked

Guidelines

- If credit card authorization has been implemented, credit card authorization is always run when an order is booked into Oracle Order Management. Step 1, above, provides a provision to have the credit card authorization run up front when the order is created in Entered status.
- For a brief discussion of the difference between Booked and Entered orders, see the "Orders Business Flow" section in the chapter, *Implementing Carts and Orders*, page 13-1. For additional information other than that found in this guide, see the *Oracle Order Management Implementation Guide*.

Statement Billing Address for Credit Cards

Merchants have the option to specify (through a setup in Oracle Payments) whether the statement billing address is required information to store a credit card number to use during checkout. As an aspect of fraud prevention, statement billing address information is used for the credit card payment verification service, Address Verification Service (AVS); this service verifies that the credit card is valid and that the address information matches the data that the credit card issuer has on file for the card (the billing address of the card). When implementers mark a credit card statement address as mandatory in Oracle Payments, Oracle iStore also marks this as mandatory information customers must select as part of credit card data in the following areas:

- Payment Book
- Express Checkout Preferences
- Payment and Billing Information Page during checkout

If credit card statement address is not mandatory in Oracle Payments, Oracle iStore does not expose credit card billing statement address anywhere in the Customer Application.

Note: This functionality applies only to newly created credit card data, or to updated credit card data. Data from previously entered credit cards will not be affected, unless the customer attempts to update an existing credit card; in this case, if the billing statement address is mandatory, during update the customer will be required to select the statement address.

Implementing Mandatory Credit Card Statement Address

This functionality requires integration with Oracle Payments. To implement the mandatory credit card statement address, in the Oracle Payments System Security Options page, set the Require Statement Billing Address Entry field to Yes and save changes. There are no setups required within Oracle iStore. See the *Oracle Payments Implementation Guide* for more information on the setup.

Setting up Payment Types

See the following to set up either non-credit card or credit card payment types:

- "Setting up Non-Credit Card Payment Types"
- "Setting up Credit Card Payment Types"

Setting up Non-Credit Card Payment Types

To set up non-credit card payment types in Oracle iStore:

1. Perform the required payment types setups listed in the *Oracle Receivables User Guide*.
2. Enable the payment types in the Site Administration Application. See the chapter, *Implementing Site Management*, page 5-1, for details.
3. If enabling Purchase Order, for each applicable site, activate the Ask for Purchase Order checkbox in the Update Site: Payments page. This will allow the appearance of the Purchase Order textbox in the Customer UI's Payment and Billing Information page.

Note: Purchase order functionality cannot be used with item-level billing. See the section, "Setting up Item-Level Billing", within this chapter, for more information.

The following figure shows how the Purchase Order textbox might display in an Oracle iStore implementation.

Example Purchase Order Number Textbox

<p>Purchase Order Information: If you have a purchase order, please enter it here: Purchase Order No: <input type="text"/></p>

Setting up Credit Card Payment Types

To set up credit cards as payment types:

1. Perform the required credit card payment types setups listed in the *Oracle Receivables User Guide*.
2. Enable the credit cards as payment types in the Site Administration Application. See the chapter, *Implementing Site Management*, page 5-1, for details.
3. Set the profile option, *ASO: Credit Card Authorization*, to Yes. See the appendix, *Profile Options*, page A-1, for more information on the profile option.

Using Payment Types Threshold

This section discusses Oracle iStore's Payment Types Threshold feature.

Payment Types Threshold Overview

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

From a functional perspective, the Oracle iStore payment detail page displays the appropriate payment types assigned to the payment method threshold. For example, if it is designated that all orders under \$2000 must be paid with a credit card, when the customer proceeds to checkout, Credit Card is the only payment method available to him.

This feature has the following functionality:

- In a multiple-site deployment, some sites can have the Payment Threshold feature enabled, while other sites do not.

- Payment Threshold can be enabled for each installed currency.
- For purchases below the payment threshold, customers will only see appropriate payment types for which their order qualifies.
- You can exclude a B2B customer, or group of B2B customers, from the threshold restriction, by assigning a user the permission, IBE_IGNORE_THRESHOLD. For more information on user permissions in Oracle iStore, see the appendix, Seeded User Data, page B-1.

Tables Involved in Payment Types Threshold

From a technical standpoint, Payment Types Threshold affects three tables in the database. The following table shows the data.

Payment Method Threshold - Database Tables

Table Name	Field Name Affecting Threshold	Comments
IBE_MSITES_B	PAYMENT_THRESHOLD_ENABLED_FLAG	Indicates if the payment threshold is enabled or not. "Y" is if it is enabled.
IBE_MSITE_CURRENCIES	PAYMENT_THRESHOLD	Holds the payment threshold value for the currency.
IBE_MSITE_INFORMATION	MSITE_INFORMATION2	Used to save the flag which indicates if this payment type can be used below the payment threshold. "Y" indicates that it can be used below the threshold.

Implementing Payment Types Threshold

To enable a Payment Threshold, follow the step below:

Prerequisite

When Express Checkout is enabled, the only payment type available to a customer using Express Checkout is credit card. Therefore, if you have set up a site to mandate that credit cards are **not** a valid payment type for purchases below the threshold amount, you should disable Express Checkout. Remember, B2B users assigned the permission, IBE_IGNORE_THRESHOLD, will not be affected by the threshold. See the "Express Checkout" section in the chapter, Implementing Carts and Orders, page 13-1,

for more information on Express Checkout.

Here are the high-level steps:

1. Log into the Site Administration Application and update a site.
2. In the Update Site page, ensure that the Enable Threshold for Payment Types checkbox is active.
3. Navigate to the Pricing page by selecting the Pricing hyperlink. 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).
4. Navigate to the Payment Types page by selecting the Payment hyperlink: In the Update Site page, select the Payment hyperlink. The Payment Types page will display all payment types currently supported by the site. To enable the payment threshold functionality for a payment type, select the Use Below Payment Threshold checkbox next to the payment type in the table.
5. Save your changes.

Setting up Item-Level Billing

B2B customers can select bill-to contacts and addresses at item level during checkout.

Note: Item-level billing is supported only with the payment types, Cash and Invoice. These two types are supported only when a purchase order is not specified. An error will occur if users attempt to use purchase orders with item-level billing.

Enable item-level billing by setting the profile option, ASO: Enable Line Level Billing, to Yes. See the appendix, Profile Options, page A-1, for more information on the profile.

Setting up Payment Commitments

A commitment is a contractual guarantee with a customer for future purchases, usually with deposits or prepayments. In Oracle iStore, B2B users select commitments during checkout. A merchant then creates invoices against the commitment to absorb the deposit or prepayment. Customers can use commitments at item level, with any cart-level payment method.

To set up Payment Commitments:

- Define Commitments -- See the "Define Commitment" section
- Enable Commitments -- See the "Enable Commitment" section.

Define Commitment

Commitments are defined with deposits or guarantees. See the *Oracle Receivables User's Guide* for information on how to set up commitments.

Enable Commitment

To enable commitments:

1. Set the following profile option at the application level for Oracle iStore: IBE: Use Commitments. Set to Yes. If set to No, commitments are not available. The profile option defaults to No if not set.
2. Set the profile Sequential Numbering to `Not Used` at the Oracle iStore application level. If you are using Sequential Numbering with Oracle Receivables and still want to use commitments, you can keep the Sequential Numbering turned on at the site level and still enable commitments at the application level.

Setting up Shipping Functionality

Shipping methods, also known as freight carriers, are defined in Oracle Forms, using any responsibility that contains the Shipping setup menus -- these responsibilities may include Inventory, Order Management Super User, or Purchasing.

Setting up Web-Enabled Shipping Methods

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

Note: All shipping methods set up in Oracle Forms will display in the Site Administration Application. But only those shipping methods set as Web Enabled and assigned to the correct item validation (inventory) organization for the user's operating unit will be available to customers in the Customer Application.

To set up shipping methods as web-enabled, log into Oracle Order Management, and, in the Carriers form, select Web Enable for each carrier you have set up. See the *Oracle Order Management Implementation Manual* for more information.

Assigning Freight Carriers to Default Inventory Organization

In addition to setting up shipping methods as Web Enabled, freight carriers (shipping methods) must be enabled for the item validation (inventory) organization that is tied to the operating unit linked to the customer responsibility being used in the Customer Application. The customer's operating unit is defined in the MO: Operating Unit profile option, set at responsibility level.

You may use the following steps:

Steps

1. Log into Oracle Forms as a user with access to the Freight Carriers menus.
2. Navigate to Setup, then Freight Carriers; query the applicable freight carrier.
3. Under the Services tab, select the Organization Assignments button.
4. Activate the Assigned checkbox for the item validation (inventory) organization that is specified for the appropriate customer responsibility.
5. Repeat for each freight carrier.
6. Save your changes.

Note: To quickly find the correct inventory organization per operating unit, log into Oracle Forms as Order Management Super User and navigate to the Setup, Parameters. The organization shown in the first field of the Parameters form is the correct item validation (inventory) organization to which you should assign the shipping methods.

Setting up Shipping by Site

You must specify the available shipping methods for each site. All shipping method lookups display to the site manager in the iStore Administration Application. However, at checkout, the Customer Application only allows customers to choose shipping methods that are:

1. Enabled for the site in which the user is shopping. See the chapter, *Implementing Site Management*, page 5-1, for directions on how to select shipping methods for a site.
2. Enabled for the Inventory Organization that is the item validation organization of the user's operating unit. See the section, "Assigning Freight Carriers to Default Inventory Organization", within this chapter, for details.
3. Flagged as Web Enabled. See the section, "Setting up Web-Enabled Shipping Methods", within this chapter, for details.

Allowing Item Level Shipping

You can allow users to enter different shipping addresses at the item level by setting the profile option, IBE: Use Line Level Shipping, to Yes. See the appendix, *Profile Options*, page A-1, for more information on the profile option.

Note that promotional goods, service items, and configurable items cannot be split with item-level shipping.

Allowing Users to Enter Shipping Information

You can allow customers to enter shipping information during checkout, by setting the profile option, IBE: Use Shipping Instructions, to Yes. See the appendix, Profile Options, page A-1, for more information on the profile option.

Implementing Carts and Orders

This chapter covers the following topics:

- Overview of Implementing Carts and Orders Chapter
- Shopping Carts
- Direct Item Entry
- Shopping Cart Sharing
- Checkout and Order Placement
- Capture End Customer Data During Checkout
- Order Tracking
- Order Cancellation
- Order Returns
- Oracle iStore and Party/Account Merge
- Shopping Cart Purge

Overview of Implementing Carts and Orders Chapter

This chapter contains information on implementing and configuring Oracle iStore shopping carts and lists, order placement, order tracking, returns, and customer contact information functionality.

Shopping Carts

Oracle iStore Customer Application shopping carts enable customers to store products for purchase and then ultimately to purchase the items using the carts. The ability to create and save shopping carts is automatically enabled in your specialty sites. Several other cart features are controlled by profile options whose setups are discussed in this chapter.

Shopping Carts Overview

For both B2B and B2C users, Oracle iStore shopping carts are characterized by the following:

- Users can add items to the active cart at any time.
- Users can maintain any number of carts.
- Users can save carts for retrieval up until the expiration date, which is specified in a profile option discussed later in this chapter, in the section, "Shopping Cart Expiration Values".
- Under various conditions, the system saves carts for users. This functionality is described in the section below, "System-Saved and Default-Named Shopping Carts".
- A full Cart menu enables self-service management of carts.
- The shared cart feature allows users to participate in collaborative shopping and purchasing. This feature can be turned on or off by setting a profile option. Oracle iStore can send e-mail messages to users involved in sharing carts.
- Carts can be saved as shopping lists and then re-utilized as carts; this functionality is controlled by a profile option.
- If integrating with Oracle Quoting, sales-representative-assisted carts become quotes that can be altered by sales representatives. These quotes appear in the Quotes Page for the user. Quotes created in Oracle Quoting can also be published to the iStore customer. See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, for details.
- Published quotes can be shared with other users. See the section, "Quote Sharing", within this chapter, for details.
- As with all Customer Application pages, the pages that display shopping cart functionality use seeded Display Templates, allowing a wide range of display possibilities. A complete list of Display Templates is contained in the appendix, *Seeded Display Data*, page C-1. For an introduction to Display Templates, see the "Display Templates Overview" section in the chapter, *Implementing the Catalog*, page 9-1. Information on configuring shopping cart bins can be found in the chapter, *Advanced Display*, page 36-1.
- Note that cart versioning does not occur in Oracle iStore.
- You can utilize several B2B user role permissions to control access to specific functionality -- see the appendix, *Seeded User Data*, page B-1, for more

information on these permissions.

- Shopping carts are tied to the operating unit associated with the site where they are created. Therefore, if a customer creates a shopping cart and then navigates to a site mapped to a different operating unit, the cart he had previously will have disappeared and he will need to create a new cart.

Types of Shopping Carts

In Oracle iStore, shopping carts are categorized as follows:

- **Active Shopping Carts:** In a user session in the Customer Application, an active cart is the cart currently being updated by the user. See the "Working with the Active Cart" section, within this chapter, for more information.
- **Saved Shopping Carts:** A saved cart is a cart which has been saved for later use. For more information, see the following sections within this chapter: "Active/Saved Carts Process Flow", "Accessing Saved Carts", and "System-Saved and Default-Named Shopping Carts".
- **Quotes:** Quotes are either sales representative-published quotes or carts for which users have requested sales assistance. Quotes can be shared. This functionality requires integration with Oracle Quoting. See the sections, "Quote Sharing" and "Requesting Sales Assistance During Checkout", within this chapter, and the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information.
- **Shared Shopping Carts:** A shared cart is a shopping cart shared with other users. See the section, "Shopping Cart Sharing", within this chapter, for more information.

Shopping Cart Menu

The Cart menu in the Customer Application allows users to manage their shopping carts. Users select the Cart icon in the Customer Application screen to access this menu. The following subtabs are available within the Cart menu:

- **Shopping Cart:** This page always shows the user's active cart. See the "Working with the Active Cart" section, within this chapter, for more information.
- **Shopping Lists:** This page contains a user's saved shopping lists, if this functionality is enabled. See the "Shopping Lists" section, within this chapter, for details.
- **Carts:** The Carts page lists all of a user's shopping carts, including shared carts. See the section, "Accessing Cart Lists in the Carts Page", within this chapter, for more details.

- **Quotes:** The Quotes page lists all of a user's quotes, including shared quotes, if Oracle Quoting integration has been implemented. See the section, "Quote Sharing", within this chapter, and the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information.

Note that the user interface of the above pages is designed with an Actions drop-list which allows users quick access to a variety of allowable actions. See the "Common Shopping Cart Elements" section, below, for more information about the actions.

Active/Saved Carts Process Flow

The following is a high-level process flow for active and saved shopping carts in Oracle iStore's Customer Application pages.

Note: Carts must be active to be modified by the user. To add an item to an active cart, the user can be a guest or a signed-in user. The user will be required to sign in when he attempts to save the cart.

1. A user enters a specialty site and adds one or more items to the shopping cart by selecting the Add to Cart button. When the user selects the Add to Cart button, if the user already has an active cart (whether an unsaved cart or a saved cart), Oracle iStore will add the items to the *existing* active cart.
2. The active cart appears within the Shopping Cart subtab in the Cart menu, with the page title, Shopping Cart.
 - **Special scenario with logged-out user having an active shared cart/quote:** If a logged-out user has a *shared* cart or quote as his active cart --- and then signs-in and presses Add to Cart --- Oracle iStore places the shared cart/shared quote into a de-active, saved state, and at the same time, adds the items to the active cart, making the guest cart the active cart. This scenario can occur if the user had been logged in, was viewing the active shared cart/shared quote, and then logged out. The user can retrieve the de-activated cart in the Carts or Quotes pages.
3. The user can select the Save Cart action and press Go in the Shopping Cart page to save the active cart. This de-activates the cart. The user can then create a new active cart and access the saved cart at a later time.

In addition, please note the following:

- The user can verify that the cart has been saved by viewing the cart name at the top of the cart.
 - A shopping cart can be saved at any time, until the order is placed with the cart. After order placement, the cart will no longer be available to the user, whether he has saved it or not.

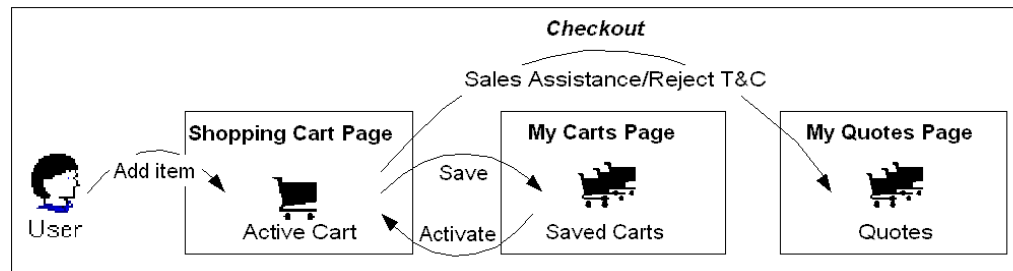
- The user does not need to save the cart to place an order with it.
- If the user attempts to save the cart and the cart does not yet have a user-defined name (it may already have a system-saved name), after selecting the option to save the cart, the user is given the following choices in the Save Cart page:
 1. **Create a new saved cart** --- To create a new cart, the user selects the Cart Name radio button. The user must then enter a name for the cart. The name does not have to be unique.
 2. **Add items to an existing cart** --- This option is only available if the user has at least one saved cart. To add items to an existing cart, the user selects the Add to Existing Cart radio button and selects an existing saved cart from the existing carts drop-list. If this option is chosen, all items added to the cart inherit cart-level information of the target cart.
- 4. If the cart already has been saved/named by the user, then the cart is simply re-saved when the user saves the cart. Performing an action that saves a cart deactivates the cart, and a new, active cart becomes available.
- 5. To complete the save process, the user selects the Apply button, and a confirmation message is displayed.

The expiration date for the cart is set to the value determined by the cart expiration profile value. The expiration date can be seen by the user in the Carts and Shopping Cart pages. See the "Shopping Cart Expiration Values" section, within this chapter, for more information.

The user can access the saved cart at any time. See the "Accessing Saved Carts" section. The user must log in to access a saved cart.

The following diagram shows the active/saved cart process.

Active/Saved Cart Process Flow



Note that the above flow does not cover the quote updates. See the "Update Quote Process Flow" in the chapter, Customer Application Process Flows, page 37-1, for this

flow.

Common Shopping Cart Elements

Following are common shopping cart elements and related behavior:

- **Actions list of values (LOV):** Shopping cart pages (including active carts, saved carts, shared carts, published quotes, and shared quotes) have an Actions LOV that allows users to perform cart activities. To engage the action, the user must press the Go button after selecting it. Not all of the actions appear on all of the pages -- this information is contained within the sections that describe the individual pages.

Following are the actions:

- **Update Cart:** This action, which activates the cart, only displays if the cart is not active. Its usage is described in the "Accessing Saved Carts" section within this chapter.
- **Express Checkout:** This action, which adds cart items to the customer's express checkout queue, only displays if Express Checkout functionality is enabled.
- **Save Cart:** This action always displays. If the cart has already been saved, selecting this action deactivates the cart.
- **Share Cart/Share Quote:** This action displays only if Cart Sharing is enabled.
- **Save to List:** This action displays only if Shopping Lists are enabled.
- **Check Availability:** This action displays only if Check Availability functionality is enabled.
- **Pricing Agreement:** This action allowing users to navigate to pricing agreements and commitments, assign pricing agreements at cart and item levels and return to the cart, is available only if pricing agreements have been set up and the user is a logged-in B2B or partner user. In addition to any required merchant setups, B2B users must have the IBE_USE_PRICING_AGREEMENT and IBE_VIEW_NET_PRICE permissions in their user roles to access pricing agreement functionality.
- **Additional Information:** This action allowing users to navigate to the Additional Information descriptive flexfield (DFFs) is available only if the Additional Information DFF has been enabled for the shopping cart.
- **Attachment:** This action, available to B2B and partner users, allows them to add an attachment to the shopping cart. The profile option IBE: Attachment Document Category must be enabled at the site level to enable this action.
- **Delete Cart:** This action, which deletes the cart, always displays if the user is

viewing an active cart. The user must confirm the deletion. Deleted carts are no longer accessible. Note: if the user is working with an active quote, the user will not be able to delete it.

- **Duplicate Cart/Copy to Cart (for quotes):** This action creates a copy of the cart or quote. The user is prompted to enter a name for the copied cart or quote and to save it. Once saved, the cart or quote behaves as any other saved cart and quote.
- **Direct Item Entry:** This action displays only if Direct Item Entry functionality is enabled and the user is a B2B or partner user. The profile option IBE: Use Direct Item Entry must be enabled at the site level to enable this action.
- **Request Help:** This action displays only when integration with Oracle Quoting is enabled. A guest user selecting this action will be required to sign in before proceeding to the next step.

Note: If there is no active cart, then the only action available in the Shopping Cart page is Direct Item Entry.

The setup information for most of the optional features listed above is contained within this chapter. Other chapters to reference within this guide include: Integrating Oracle iStore with Oracle Quoting, page 28-1, Integrating Oracle iStore with Oracle Advanced Supply Chain Planning, page 21-1 (for Check Availability), Advanced Display, page 36-1, and Implementing Pricing, page 11-1.

- **Checkout button:** Checkout is a standard button on the cart. When the customer presses the Checkout button, the cart enters the checkout phase, allowing the user to place an order with the cart. Once the order is placed, the cart is no longer available to the user. Note that B2B users must have the appropriate permissions in their user roles to check out (IBE_CHECKOUT) and place orders (IBE_CREATE_ORDER).
- **Continue Shopping button:** The other standard button on the cart is the Continue Shopping button; this button takes the user back to the catalog.
- **Recalculate button:** The user can press the Recalculate button to recalculate the cart totals.
- **Item information:** Shopping carts display the following information about items: Part number, item name, unit of measure, quantity, and price (as a hyperlink; see next bullet point). For B2B users, the pricing details hyperlink is displayed only if the user is assigned the permission, IBE_VIEW_NET_PRICE; otherwise, the price displayed in the shopping cart will be the List Price.
- **Pricing Details pop-up window:** By default, only net price is displayed in the cart. Clicking on a price link retrieves the Pricing Details page, where the user can see:

List Price and Pricing Adjustment Name of all discounts and surcharges applied at line and order level (values will be displayed in brackets if negative, and the corresponding percentage will be displayed in parentheses), Total Adjustment, and Net Price. These values will be displayed for unit and total quantities. The Pricing Details page also shows Part Number, Item Name, Quantity, and UOM of the item queried.

- **Pricing Details for configured items/models:** For configured items and models, the pricing link is shown at the parent model level. The Part Number, Item Name, ordered Quantity and UOM shown are those related to the parent model. If a model does not contain any recurring lines, prices are rolled up to the parent item. In this case, the pop-up displays the rolled-up price of the model in the same format as for a regular item, as well as the rolled-up values of all discounts and surcharges at child and parent levels. Users can select the configuration details to view the pricing details for each child of the model. The pricing pop-up for each child is displayed with the same format used for standard items. No roll up is performed at the parent model level for telecommunications service ordering (TSO) items. If the price of the model or sub-model is null, then no price is displayed, and thus no pop-up is available.
- **Item link:** Each item name is a hyperlink leading to details about the item, as defined in inventory.
- **Promotion Code field:** The Promotion Code field allows customers to enter promotion codes. To enable the Promotion Code field in the Shopping Cart page, set the profile option, IBE: Use Promotion Code. See the appendix, Profile Options, page A-1, for more information on the profile. Note that in addition to any required merchant setups, B2B users must have the IBE_VIEW_NET_PRICE permission in their user roles to access promotion code functionality.

To apply a new promotion to an item, enter a promotion code in the Promotion Code field and click the Apply button. The Promotion Codes table displays the promotion codes that have been applied. To remove a promotion code from the table, click the trash bin icon in the Remove column.

- **Remove icon:** The customer can click the Remove icon to remove items from the cart.
- **Quantity field:** The customer can enter new quantities in the Quantity fields.
- **Tax information:** Tax rates display at item or cart level, depending upon setup. B2B users must have the IBE_VIEW_NET_PRICE permission in their user role to see tax rates.
- **Add Service link:** If Service Items functionality is enabled, the customer can click the Add Service link to add services to items in the cart, where applicable. Only serviceable items with associated services display this link.

- **Model Item Details link:** A Details link in the cart takes users to details of configured items. Note: option classes are displayed only if the profile option IBE: Display Option Classes in the Shopping Cart and Order Tracker, is set to Yes.
- **Reconfigure link:** If the merchant has enabled configured items, the user can click the Reconfigure link to begin reconfiguring these items. This retrieves the Configuration Details page for the item.

Accessing Cart Lists in the Carts Page

To view a list of saved or shared carts, both B2B and B2C registered users select the Cart icon in the Customer UI, and then select the Carts subtab. In the Carts page, carts are organized by type, with the most recently created cart appearing first in its section. Shopping cart expiration dates also display. Cart names are hyperlinks which lead to the details page for the cart. Alternatively, customers can select several actions from a drop-list and then press Go to perform the action.

See also: "Working with the Active Cart" section, within this chapter

The main sections on the Carts page are:

- **Saved Carts:** This section contains a customer's saved carts. Both B2C and B2B users will see this section.
- **Shared Carts:** If the merchant has implemented this functionality, the Shared Carts section shows a user's shared carts, separated by type (note that the Shared Carts section is different for B2C and B2B users):
 - **Carts Shared By You:** This section lists carts the customer is currently sharing with other users. Both B2C and B2B users will see this section.
 - **Carts Shared With You** --- A section with this label exists only for B2B customers. It lists carts that another user is sharing with the user. In this section, users will also see carts they have re-shared. For example, if User A shares with User B and User B shares with User C: For User B, the cart will still show Carts Shared With You, even though he has re-shared the cart.
 - **Cart Retrieval Textbox** --- Instead of a Carts Shared With You section, B2C users will see a cart retrieval textbox. By entering in the box the unique cart retrieval number, B2C users can retrieve a shared cart. See the section, "Retrieving Shared Carts", within this chapter, for more information. For B2B backward compatibility options relating to Sharee Number of previous releases, see the section, "Implementing Shared Carts", within this chapter.

Additional Carts Page Behavior


Following are some additional points regarding Carts page behavior.

- Quotes never appear on this page; quotes always appear on the Quotes Page.
- If the user's active cart is a saved or shared cart, then the cart will have a graphic icon (star) next to it, to visually represent the cart. You can see an example of this icon in the Carts page figures on the following pages. All saved or shared carts show up on this page.
- Once an order is placed with a cart (whether active, saved, or shared) it no longer appears here.
- If a cart owner stops sharing a cart, it disappears from the list of shared carts on this page. It will then show up under saved carts.
- If a recipient removes access to a shared cart, the shared cart disappears from the recipient's lists of carts.

The following figure shows a typical Carts page for B2B users.

Carts Page - B2B Users

Carts

 Indicates your current cart

Saved Carts

Click on a cart name to view the details.

Select a cart and... Actions: Update Cart

Select	Cart Name	Created Date	Expiration Date
<input type="radio"/>	Printers	21-SEP-2006	20-DEC-2006
<input type="radio"/>	Office Supplies	21-SEP-2006	20-DEC-2006

Shared Carts

Click on a cart name to view the details.

Carts Shared With You

Select a cart and... Actions: Update Cart

Select	Cart Name	Created Date	Expiration Date	Shared By	Role
<input type="radio"/>	Vision Wireless Shared	21-SEP-2006	20-DEC-2006	Carmen M	Viewer

Carts Shared By You


Select a cart and... Actions: Update Cart

Select	Cart Name	Created Date	Expiration Date
<input type="radio"/>	Vision Shared Cart	21-SEP-2006	20-DEC-2006

The following figure shows a typical Carts page for B2C customers.

Carts Page - B2C Users

Carts

 Indicates your current cart

Saved Carts

Click on a cart name to view the details.

Select a cart and... Actions:

Select	Cart Name	Created Date	Expiration Date
<input type="radio"/>	Office Supplies	21-SEP-2006	20-DEC-2006
<input type="radio"/>	Computer Supplies	21-SEP-2006	20-DEC-2006

Shared Carts

Click on a cart name to view the details.

Retrieve Shared Cart

Please enter Sharee Or Retrieval Number from e-mail notification and click on 'Retrieve'

Carts Shared By You

Select a cart and... Actions:

Select	Cart Name	Created Date	Expiration Date
<input type="radio"/>	Office Supplies Shared	21-SEP-2006	20-DEC-2006

For more information, see the following sections within this chapter:

- "Accessing Saved Carts"
- "Retrieving Shared Carts"

Accessing Saved Carts

From the Carts page, customers select a saved cart name hyperlink to retrieve the Saved Cart Details page. This page shows all items in the cart, as well as item prices, sold-to customer information, and shipping/billing information. Note that users without the IBE_VIEW_NET_PRICE permission will not see discount and net prices.

Saved Cart Details Page Activities

From the Saved Cart Details page, the user can perform the following actions:

- Update Cart: Selecting the Update Cart action or Checkout buttons activates the cart. When the customer activates the cart, the following occurs:
 - If the customer already is working with an unsaved, active cart with at least one item in it, Oracle iStore automatically system-saves and de-activates this cart. (A system-saved cart displays on the Carts page, in the Saved Carts area, just as an explicitly-named cart.)
 - If the customer is working on another saved cart or shared cart, Oracle iStore saves these as well.

- The Pricing Engine verifies item prices.
- Share Cart
- Checkout
- Express Checkout
- Delete Cart
- Duplicate Cart
- View Pricing Details
- View Item Details

See the "Common Shopping Cart Elements" section, above, for more information about these actions.

Accessing Saved Quotes

From the Quotes page, customers select a saved quote name hyperlink to retrieve the Saved Quotes Details page. This page shows all items in the quotes/cart, as well as item prices, sold-to customer information, and shipping/billing information.

Important: This functionality requires integration with Oracle Quoting. Refer to the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information.

Saved Quote Details Page Activities

From the Saved Quote Details page, the user can perform the following actions:

- Checkout
- Express Checkout
- Share Quote
- Copy to Cart
- Update Quote

Note: Updating quotes is only allowed when the profile option, IBE: Allow Update for Draft Quotes, is Yes.

See the "Common Shopping Cart Elements" section, above, for more information about these actions.

Working with the Active Cart

The active cart is the cart currently being updated by the user. It always appears under the Shopping Cart subtab within the Cart menu, and has the page title, Shopping Cart. Only one cart can be active for a user at a time. To activate a saved or shared cart, the user must either update the cart or start the checkout process.

The shopping cart displays the following columns with item information: part number, item name, UOM, quantity and price (net total price). The total price hyperlink launches a pop-up window that displays list price, net price, and all discounts and price adjustments for that unit and the total quantities of the item.

Active Cart Activities

In the active cart, the user can perform the following actions:

Note: When an active cart contains no items, the user will only have the following actions available: Continue Shopping, Save Cart, Share Cart (if implemented), Delete Cart, and Direct Item Entry (B2B only).

- Continue Shopping
- Express Checkout
- Checkout
- Enter additional information
- Access pricing agreements
- Use promotion codes
- Add attachments
- Check item availability
- Save the cart
- Save the cart as a list
- Share the cart
- Delete items
- View item details
- Change item quantities
- View item prices

- View tax information
- Add services to items
- Reconfigure items
- View configured item/model bundle details
- Delete the cart.
- Recalculate the cart

See the "Common Shopping Cart Elements" section, above, for more information about these actions.

Identification of Active Carts for Users

The following behavior exists with active carts and user identification:

- For returning and guest users for whom there is a cookie, the active cart is identified from the cookie.
- For logged-in users -- when there is no cookie for the user -- the active cart is identified from the database. Otherwise, the active cart is identified from the cookie.
- For guest users who do not have an associated cookie, a new cart is created. The cart creation happens in the background and is transparent to the guest user.

System-Saved and Default-Named Shopping Carts

When a new cart is created by the system --- for example, when a user adds an item to a cart for the first time --- it is given a default name, which can be defined by the merchant. When this default-named cart gets saved while activating another cart, it becomes a system-saved cart and is given the system-saved name, as set up by the merchant.

Example:

1. A user with no active cart selects the Add to Cart button. A cart is immediately created for the user, which is now the user's active cart (Cart A).
At this point, the system has named Cart A, "Store" (this name can be specified by the merchant).
2. The user leaves this active cart (Cart A) and navigates to the Carts page. He selects a previously saved cart (Cart B) and updates/activates it (by pressing Update or Checkout button).
At this point, the system gives Cart A the default system-saved name, "Store"

(this name can be specified by the merchant).

3. At any point in this process, the user can explicitly save the cart by selecting the Save Cart button.

See the section, "Naming Behavior for System-Saved and Default-Named Carts", below, for more information.

Naming Behavior for System-Saved and Default-Named Carts

The default name given to default-named and system-saved carts can be controlled by mapping a source file to the message-class media objects associated with these carts, or by updating the FND message text in Oracle Forms.

Note: It is not required that you change the names of system-saved and default-named carts. By default, their names will be `Store` (default-named) and `Store Saved` (system-saved).

Out-of-the-box, these media objects have no site/language mapping. Oracle iStore uses the `DisplayManager.getTextMediaOrFndMsg` API to get the cart name, and this API returns a custom prompt (media object site/language mapping), if defined; otherwise, it returns the FND message text.

A cart name can be mapped to all sites and all languages, or can be mapped by site/language, using standard Oracle iStore media object site mapping functionality. For more information, see the chapter, *Implementing Content*, page 10-1.

To change the name of the carts using Oracle Applications text messages, you can update the FND message text. See the chapter, *Implementing Messages and Prompts*, page 16-1, for steps.

Following are the values for the two message-class media objects for default-named and system-saved carts:

- **iStore Default-Named Cart Name** media object:
 - Programmatic access name:** `IBE_PRMT_SC_UNNAMED`
 - Default FND message text:** `Store`
- **iStore System-Saved Cart Name** media object:
 - Programmatic access name:** `IBE_PRMT_SC_DEFAULTNAMED`
 - Default FND message text:** `Store Saved`

Duplicating Shopping Carts

Customers can duplicate shopping carts and quotes (including shared carts and quotes) from several cart-related areas of the Customer Application. When a cart or quote is duplicated, customers are prompted to name the cart/quote. Once named and saved, duplicated carts or quotes behave as any other saved cart (or saved shared cart or

quote).

Duplicating Carts

Customers can duplicate shopping carts from the following pages: Carts page, Saved Cart Details page, and Shared Cart Details page.

Duplicating Quotes

Customers can duplicate quotes from the following pages: Quotes page, Quote Details page, and Shared Quote Details page. In the Actions LOV, the quote duplication action is labelled Copy to Cart. Duplication of quotes follows the same rules of standard shopping cart duplication. Once a quote is duplicated, it is stored under Saved Carts.

Rules and Guidelines of Cart Duplication Feature

Specific rules and guidelines exist for duplicated carts and quotes, as described below.

- If the user copying a cart is the owner of the cart, and the cart has never been shared, all attributes are copied during duplication.
- If the user is the owner of the cart and the cart has been shared at least once (even if it is not shared anymore), or if the user is an administrator, viewer or participant of a shared cart, at duplication time the user is set as sold-to contact and owner of the cart. Attributes related to recipients, and attributes the user does not have access to, are not duplicated.

When duplicating shared carts, only following information is copied: items, agreements (if the user has the requisite permission), and commitments (if applicable). Oracle iStore does not copy the following data: payment information (credit card number, check number, P.O. number); billing information (bill-to customer, contact and address); shipping information (ship-to customer, contact, address); flexfield data; and attachments.

- For quotes, both regular and shared, not all the attributes will be copied. Only items, agreements, and commitments will be copied, if applicable.
- Duplicated carts have the same expiration duration of non-copied carts.
- If the duplicated cart is copied from a shared cart and sensitive information is not copied, then hard-coded defaulting rules are initiated to populate empty fields with the appropriate data.

Implementing Cart Duplication Feature

The cart duplication feature is implemented by default for both B2B and B2C users.

Shopping Cart Items Pricing

This section contains information about the pricing of items in shopping carts.

Automatic Re-pricing of Cart Items

Items in shopping carts get re-priced any time a user updates the cart. This includes, for example, adding items to the cart or changing shipping/billing information. Assuming IBE: Use Price list Associated with Specialty Site profile is Yes (meaning that the site where the user is shopping is using a site-based, assigned price list), if an item has been re-priced on the assigned price list, the pricing engine finds and displays the correct, updated price. In the case where an item in the user's cart has been removed from the price list, then an error message will display in the cart.

If IBE: Use Price list Associated with Specialty Site profile is No, Oracle iStore will be retrieving "best prices" dynamically from the pricing engine, and will not be retrieving prices from a static price list (except for guest users). In this case, if an item has been deleted from available price lists, an error will occur when the user updates the cart. See the chapter, *Implementing Pricing*, page 11-1, for more information on pricing.

Using Pricing Agreements in Shopping Carts

A B2B user with the IBE_USE_PRICING_AGREEMENT and IBE_VIEW_NET_PRICE permissions in his user role will see the Pricing Agreement action in the Shopping Cart page. Pricing Agreements must first be implemented before they can be selected by a user. See the chapter, *Implementing Pricing*, page 11-1, for more information.

Cart-level and item-level scenarios are possible with pricing agreements:

- **Cart-Level Agreements:** When the user selects the Pricing Agreement action, the page displays the Cart Agreement page which shows any previously assigned agreements. To select a new agreement, the user selects the Assign button to select from a list of agreements that have been implemented.
- **Item-Level Agreements:** If the profile option, IBE: Use Line Agreements, has been enabled, the user also sees a section entitled, "Item Pricing Agreements". In this section, the user can add item-level agreements in the shopping cart. Note that service items and promotional items are not shown.

Using Promotion Codes in Shopping Carts

The Promotion Codes field in the Shopping Cart page allows both B2C and B2B users to enter promotion codes. Promotion codes are modifiers set up through the Oracle Order Management Pricing module.

To enable the Promotion Code field in the Shopping Cart page, set the profile option, IBE: Use Promotion Code. See the appendix, *Profile Options*, page A-1, for more information on the profile option. Note that in addition to any required merchant

setups, B2B users must have the IBE_VIEW_NET_PRICE permission in their user roles to access promotion code functionality.

To apply a new promotion to an item, enter a promotion code in the Promotion Code field and click the Apply button. The Promotion Codes table displays the promotion codes that have been applied. To remove a promotion code from the table, click the trash bin icon in the Remove column.

To selectively apply or remove promotion codes at the line level, select Line Promotions from the Actions drop-down list on the Shopping Cart page. The Line Promotions page appears with a list of line items. Users can enter valid promotion codes on the selected line items and click Apply.

See the *Oracle Order Management Implementation Manual* for additional information.

Using Additional Information (DFFs) in Shopping Carts

Oracle iStore allows you to set up cart- and item-level descriptive flexfields (DFFs) in the shopping cart to capture customer information. The Additional Information menu entry is enabled in the shopping cart actions menu. See the chapter, *Advanced Display*, page 36-1, for setup details.

Using Attachments in Shopping Carts

A B2B user with the IBE_USE_ATTACHMENT permission in his user role will see the Attachments menu entry in the Shopping Cart Actions menu. The Attachments functionality is not available for B2C users.

To use the Attachments functionality, set the profile option, IBE: Attachment Document Category. See the appendix, *Profile Options*, page A-1, for more information on the profile option.

The size of a file to be uploaded with a shopping cart can be controlled by setting the maximum file size value in the Oracle Applications (FND) profile option, Upload File Size Limit. The value should be an integer representing kilobytes (KB). For example, if the value is 100, then files up to 100 KB can be uploaded as attachments. The default value for this profile is 15,000 KB, unless implementers set a different number. If the user attaches multiple files, or one single file that exceeds the maximum size, an error message displays. (This feature requires Oracle Technology Foundation (JTF) 11.5.10.2 CU patch as prerequisite.)

After the user selects Attachments and presses Go, the Attachments page shows any previously selected attachments associated with the cart. To add an attachment from the file system, the user selects the Add Attachment button. In the file retrieval page that displays, the user selects the Browse button to select the attachment from the file system. The user also can enter a description for the file in the Description textbox. The user selects the Apply button to save the file selection.

In the Attachments page, users also can remove attachments from the cart. After attaching or removing files and applying the changes, the user selects the Back to

Shopping Cart button to return to the cart.

Checking Item Availability in Shopping Carts

Both B2B and B2C users can select the Check Availability menu item from the Actions list in the Shopping Cart page to check whether items in their carts will be available for shipping by a specified date. You must first set up Available to Promise functionality (ATP) before it will be available in the shopping cart. See the chapters, *Implementing Products*, page 7-1, and *Integrating Oracle iStore with Oracle Advanced Supply Chain Planning*, page 21-1, for more information.

After the user selects Check Availability and presses Go, the Check Availability page displays a list of cart items, along with a calendar icon to select the date for which the customer would like to check availability. The user selects the date(s), then presses the Check Availability button to display the availability information in the table column labelled, "Availability Information". When finished viewing availability information, the user selects the Back to Shopping Cart button to return to the cart.

Shopping Lists

Shopping lists allow users to save items in shopping carts to lists and then copy the items from these lists into their active carts. Shopping lists have the following main features:

- Shopping lists never expire.
- Users cannot check out with a shopping list.
- Shopping lists are accessible in the Shopping Lists subtab in the Cart menu in the Customer UI. The most recently saved list appears first in the table.
- Users can update a shopping list at any time by selecting the hyperlink of the list name.
- See the section, "Shopping List Process Flow", below, for more information on the actions that can be performed in the shopping list details page.
- Express Checkout is not allowed from a shopping list, but can be accessed after the user drills down into the item details (assuming Express Checkout is enabled).
- Service items and promotional items are not candidates for shopping lists.
- The IBE: Use Shopping Lists profile option controls whether the shopping list functionality is available to users. See the appendix, *Profile Options*, page A-1, for more information on the profile.
- The IBE: Enable Shopping List Management profile option enables the Add to Cart button with the shopping list drop-down menu to create a shopping list, view

shopping lists, manage shopping lists, and add an item to a shopping list. See the appendix, Profile Options, page A-1, for more information on this profile.

Shopping List Management

Shopping list management enables the iStore user to create a new shopping list, view existing shopping lists, and add an item or product directly to an existing shopping list. The drop-down menu is associated to the Add to Cart button.

1. The Add to Cart with the drop-down menu is controlled by the IBE: Enable Shopping List Management profile option. See the appendix, Profile Options, page A-1 for more information. If this profile option value is set to No or Null, then the standard Add to Cart button with no drop-down menu is displayed.
2. The following iStore templates include the drop-down Shopping List Management feature:
 - Single Selection Template: `ibeCCtdFSubSctL.jsp`
 - Multiple Selection Templates: `ibeCCtdFSuStMs2L.jsp` and `ibeCCtdFSuStMs3L.jsp`
 - Item Details Templates: `ibeCCtdAddItemBin.jsp`, `ibeCndSvaSvcList.jsp`, `ibeCCtdItemDetail.jsp`, `ibeCCtdItemDtlNoImg.jsp`, `ibeCCtdSvaItmDtl.jsp`, and `ibeCCtdSvcItmList.jsp`
 - Shopping Cart Page: `ibeCScdViewA.jsp`
 - Save Shopping List: `ibeCSlpOCSave.jsp`

The iStore user can click on the Add to Cart button with drop-down menu for a product to create and manage shopping lists without navigating to the Shopping List page. The iStore user must log in to the iStore customer application to view the complete list of drop-down menu options.

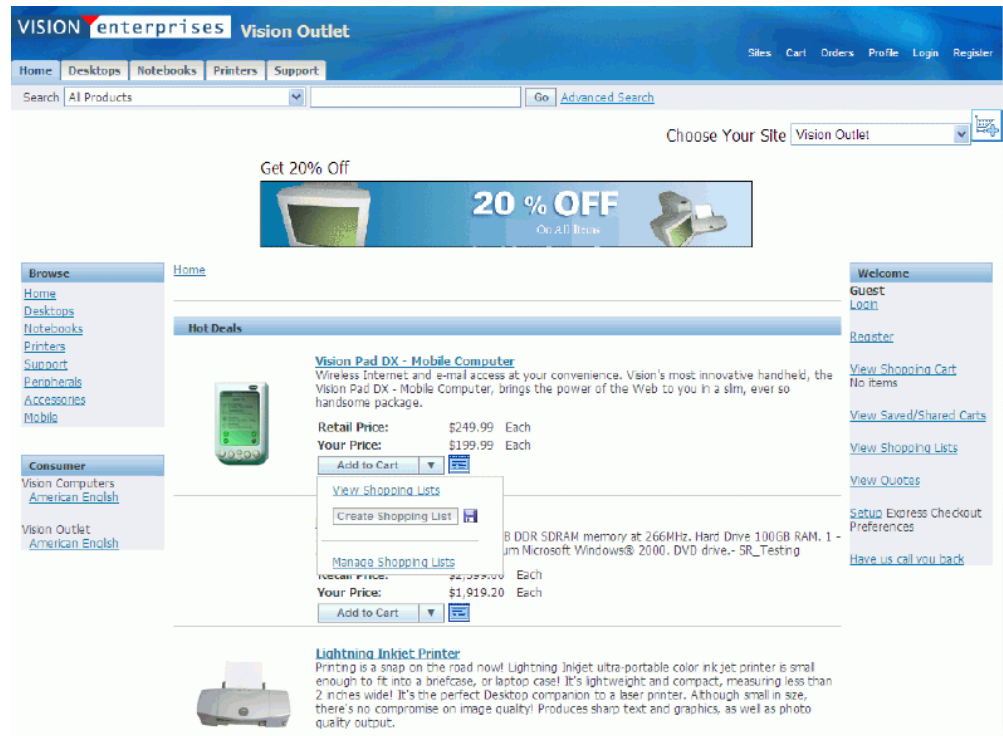
Note: The iStore user remains on the Product Catalog page or navigates to the Shopping Cart page based on the IBE: Add To Cart Navigation profile option setting. See the appendix, Profile Options, page A-1 for more information.

The Add to Cart button with drop-down menu enables the iStore user to perform the following actions:

- Click on the Add to Cart button to view the shopping list controls. Guest users can

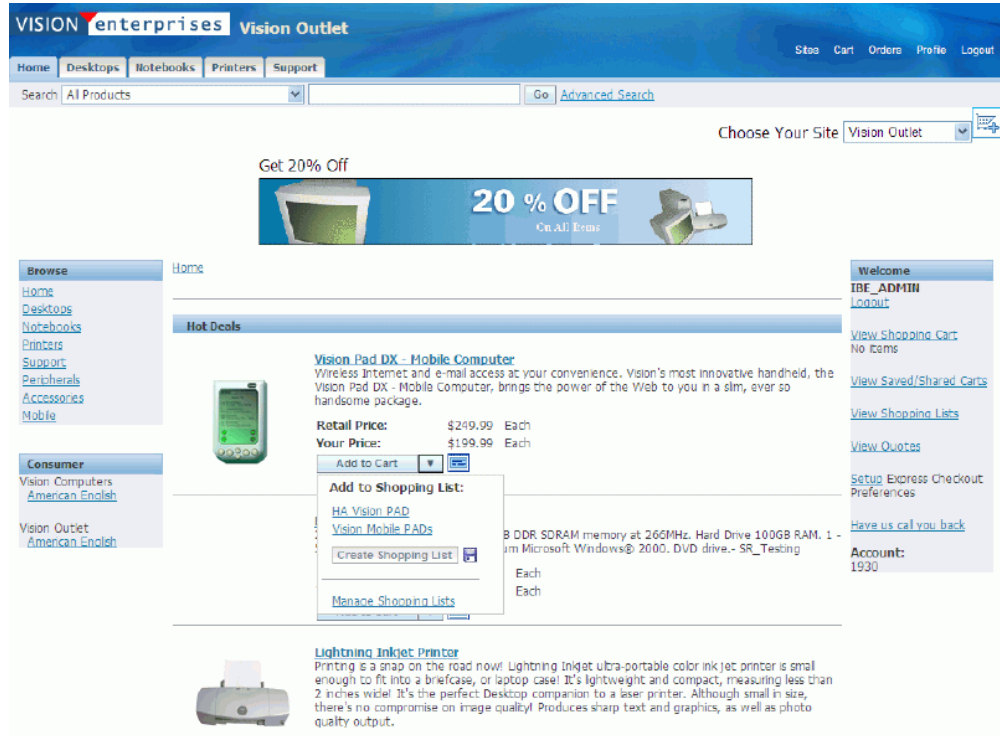
view the following menu options:

- View Shopping List
- Create Shopping List field and Save icon
- Manage Shopping Lists



Note: When the guest user clicks on the View Shopping Lists link or the Manage Shopping List link, then the guest user is directed to the Login page. Similarly, when the guest user enters a name in the Create Shopping List field and clicks on the Save icon, then the user is directed to the Login page.

- The following drop-down menu options are available after log in:
 - List of shopping lists existing for the user account
 - Create Shopping List field with Save icon
 - Manage Shopping Lists



- Select the Create Shopping List field and enter a name for the shopping list.
- Click on the Save icon. The shopping list is created and listed in the drop-down menu.
- Clicking on an existing shopping list link in the drop-down menu will add the item to that particular shopping list.
- Click on the Manage Shopping Lists link to manage the shopping lists. The Shopping Lists page appears. See the section, Shopping List, page 13-19 for more information.

Shopping List Process Flow

Following is the process flow for shopping lists:

1. A user selects the Save to List action in the Shopping Cart page.
2. In the Save to Shopping List page, the system prompts the user to:
 - Enter a new, unique list name and some brief comments to associate with the list (comments cannot be updated after saving the list).
 - Merge the items to an existing list (if one exists)

- Replace the items in an existing list (if one exists)

The user's current active cart -- including the items in it -- remains the active cart when a shopping list is saved.

3. The user presses Apply to complete the save operation, and the Shopping Lists page displays, showing the user's saved lists.
4. To retrieve a shopping list, the user navigates to the Shopping Lists page within the Cart menu, and selects the hyperlink of the desired list name. The Shopping List Details page appears.
5. To add items to a cart, in the Shopping List Details page, the user selects the appropriate items in the shopping list and presses Add to Cart.

Note that if the active cart already contains items identical to those added from the list, and the profile option, IBE: Merge Shopping Cart Lines, is enabled, the cart item quantities are added accordingly, not replaced. For example, if the active cart contains 1 quantity of Item A and the list also contains 1 quantity of Item A, when the user adds the list Item A to the cart, the cart quantity for Item A changes to 2 (assuming the merge shopping cart lines profile is on). For more information on the profile option, see the appendix, Profile Options, page A-1. See also: "Merging Duplicate Items in Cart" within this chapter.

6. Optionally, in the Shopping List Details page, the user also can:
 - Merge additional items from other lists.
 - Update quantities for items in the list by entering the numerical values in the Quantity field and pressing the Update Quantity button.
 - Delete items in the list by activating an item's Select checkbox and pressing the Delete button (not the Delete List button).
 - Drill down to product details by selecting the hyperlink of an item name. At this point, the user can add the item to a new cart and checkout, including Express Checkout.
 - Delete the entire list by selecting the Delete List button.
7. Once the user presses Add to Cart from the Shopping List Details page:
 - If an active cart with items is in use by the user, the selected items are added to the existing active cart, the Shopping Cart page. Duplicate items are merged if the profile option, IBE: Merge Shopping Cart Lines, is enabled.

Note that there are exceptions to the above for specific types of products -- see the section, "Merging Duplicate Items in Cart", within this chapter, for

additional details.

- If no active cart exists, a new cart is created which is the user's active cart.
 - The shopping list still will continue to appear in the Shopping Lists page, with the original items in it.
8. After the list items are transferred to a cart, the user can perform normal activities with the active cart. For more information on these flows, see the "Working with the Active Cart" section.

Shopping Carts and Shopping Lists Serve Different Purposes

Shopping carts and shopping lists serve different purposes for Customer UI users. The following two sections note some differences and similarities between the use of shopping carts and shopping lists.

Shopping Carts

Shopping carts are transactional entities used to check out with and purchase products from the Customer UI.

- Shopping carts are associated with the organization specified in the MO: Operating Unit profile option. In this way, the same shopping cart can potentially be accessed across different sites.
- The user creates a shopping cart by pressing the Add to Cart button in the catalog pages.
- The merchant can set an expiration time period for carts.
- Shopping carts can be shared with other users, if this functionality is enabled.
- Shopping carts contain transactional data (item prices, shipping/handling, tax, and total amounts) and customer information (addresses, billing, and shipping preferences).

Shopping Lists

Shopping lists are non-transactional entities that store products the user may wish to purchase. They help to enable future repeated purchases.

- The user creates a shopping list by selecting the Save to List action from active cart (Shopping Cart page).
- The merchant can turn shopping list functionality on/off with a profile option.
- Users can add comments to shopping lists.

- A shopping list must have a unique name when saved.
- A shopping list never expires.
- Shopping lists do not contain any transactional information, such as item prices; they also do not show customer address, billing, or shipping data.
- A shopping list cannot be shared with other users.

Shopping Cart Security

Oracle iStore uses security authentication to keep different users from accessing each others' shopping carts and shopping lists by manipulating the URL. When a user attempts to retrieve a cart, Oracle iStore verifies that the user is actually the owner of the shopping cart or a user to whom the cart has been shared; if the user is found to be neither the owner nor a recipient of the cart, then access is denied.

Tax Display in Shopping Carts

Oracle iStore supports both cart-level and item-level tax display in the shopping carts.

Tax information is set up in Oracle E-Business Tax. See the *Oracle E-Business Tax Implementation Guide* for information on how to set up taxes.

Cart-Level Tax Display

Out-of-the-box, Oracle iStore displays cart-level tax only. Cart-level tax display includes the following, applicable to a specific cart:

- Tax codes (tax printable name)
- Tax rate
- Tax amounts

Item-Level Tax Display

If enabled, item-level taxes applicable to the item are displayed below every item in the shopping cart.

To display item-level taxes, map the logical template, `STORE_CART_LINE_TAX`, to the JSP page, `ibeCScdShowCartLineTax.jsp`, appended with the parameter, `ibeDisplayLineTax=Y`. Map the template for the sites in which you wish to display item-level taxes. Following is the complete syntax that the source file field must contain in order for the mapping to be successful:

```
ibeCScdShowCartLineTax.jsp?ibeDisplayLineTax=Y
```

Notice the question mark (?) between the JSP name and the parameter.

Remember that B2B users must have the IBE_VIEW_NET_PRICE permission in their user role to see tax rates.

For information on how to map the template, see the chapter, Implementing the Catalog, page 9-1.

Displaying Amounts for More than One Tax Code

Some countries charge more than one tax (for example: VAT, local tax, provincial tax). In such cases, Oracle iStore will display the applicable amounts for each tax code at the cart level. If item-level tax display is enabled, the applicable amounts for each tax code for the item are displayed.

Shopping Cart Expiration Values

Two profile options control the number of days that active and saved carts are available to users before they expire. Carts expire at the end of the day on the day they are scheduled to expire. Expired carts are no longer accessible to users. The expiration date gets reset every time the cart is updated by the user. Note that when you change the value of the expiration profile options, existing saved carts are not affected. Shopping cart expiration dates are shown on the Shopping Cart and Carts pages.

- To set the expiration for *active* carts, set the profile option, IBE: Active Cart Expiration Duration (# days).
- To set the expiration for saved carts, set the profile option, IBE: Saved Cart Expiration Duration.

See the appendix, Profile Options, page A-1, for more information on these profile options.

Merging Duplicate Items in Cart

You can enable Oracle iStore to merge lines on an order if the items are identical. In this case, Oracle iStore increases the quantity by one for each identical item merged.

This ability is controlled by setting the profile option, IBE: Merge Shopping Cart Lines. See the appendix, Profile Options, page A-1, for more information on the profile option.

Important: If you set this profile option to Yes, you must set the profile option, IBE: Use Line Level Shipping, to No. You cannot enable shopping cart item merging and item splitting simultaneously. For more information on item level shipping, see the chapter, Implementing Payment Types and Shipping Methods, page 12-1.

Exceptions to and Rules for Merging for Specific Setups

Note the following exceptions and rules for specific setups:

- Duplicate serviceable items --- If IBE: Use Item Level Service is enabled for Service

Items Support functionality, no merging takes place. In this case, the items are added to the cart as a unique entry.

- Any line in a cart with promotional goods (PRGs) will never be merged.
- Duplicate configured items are never merged.
- When site as pricing qualifier is in effect for a site, Oracle iStore uses the price list associated with most-recently accessed site for the price of merged items. If the merge profile is off, Oracle iStore uses the price list associated with the site where the items were added to the cart.

Decimal Quantities for Cart Items

When adding an item or updating quantity in the Oracle iStore shopping cart, the customer can enter a decimal quantity if the item is divisible. Oracle iStore calls the same API used by Oracle Order Management for validating quantity. If an item is marked OM Indivisible, decimal quantities are not allowed for its primary unit of measure (UOM).

To prevent the customer from selecting a decimal quantity of an item, log into Oracle Forms with Inventory responsibility for the master inventory organization, and mark the OM Indivisible flag. See the *Oracle Inventory User's Guide* for more information.

Direct Item Entry

Oracle iStore's Direct Item Entry functionality allows users to quickly add multiple items to a shopping cart without the need for browsing for items, adding them to cart, and then checking out with them. This functionality is available for B2B users only.

Direct Item Entry Benefits

Direct Item Entry enables users to:

- Enter data quickly without having to add items one at a time from the catalog.
- Enter customer part number and Inventory part number to find items in iStore and check out with these items in the cart.
- Place orders with the company's internal part numbers if merchant-to-customer part number mapping in Oracle Inventory is set up.
- Specify a cross reference part number and cross reference type (optional) combination.
- Place orders with the company's cross reference part numbers if merchant-to-customer part number mapping in Oracle Inventory is set up.

- Upload comma separated values (.csv) files containing relevant values for customer part number, cross reference type, cross reference part number, inventory part number, unit of measure (UOM) and quantity.

Note: Model bundles, configured items, and serviceable items can be entered through the form; however, after adding to cart, these must be configured separately from the cart. For example, if you add a serviceable item to the form and then add to cart, you must add the service separately from the cart.

In the case where multiple Inventory part numbers are mapped against a single customer part number, only the highest ranked Inventory part number will be displayed.

Additional Information: If there is no active cart, then the only action available in the Shopping Cart page is Direct Item Entry.

Direct Item Entry Process Flow

The process flow for Direct Item Entry is as follows:

1. A registered B2B user logs into a specialty site, selects the Direct Item Entry action from the Shopping Cart page and clicks **Go**. The Direct Entry Form appears.
2. The user enters the following and selects **Fill Details**:
 - **Cross Reference Type:** A cross reference type is defined within Oracle Inventory as a group name for classifying the inventory item number. An Oracle Inventory installation (merchant) can define a cross reference type as Industry Standard Item that references the merchant's internal inventory item number with a higher level grouping. This allows the merchant to define a relationship between their own internal item numbers with a cross reference grouping. This functionality requires item mapping in Oracle Inventory. See the Oracle Inventory User's Guide for more information.
 - **Cross Reference Part Number:** A cross reference part number is defined within Oracle Inventory as an alternate way of referencing the internal inventory item number. This functionality requires item mapping in Oracle Inventory. See the Oracle Inventory User's Guide for more information.

Note: A customer or a cross reference part number or an Oracle Inventory part number is required at minimum.

- **Customer Part Number:** This functionality requires item mapping in Oracle Inventory. See the *Oracle Inventory User's Guide* for more information.
- **Oracle Inventory Part Number:** If only Inventory part number is entered,

Oracle iStore does not automatically enter the customer part number.

Note that either a customer or an Oracle Inventory part number is required at minimum. If the user provides both the customer and Inventory part numbers in a line, customer number takes precedence. If the user enters an invalid part number, the invalid customer or Inventory part number is preserved in the field.

- **Quantity:** If no input value is found for the item quantity, the default value of 1 is assumed.

The following table summarizes the processing rules when the user enters values in the Direct Item Entry page and clicks the Fill Details button.

Customer Part Number	Cross Reference Type	Cross Reference Part Number	Inventory Part Number	Processing Rule
Entered				Searches for customer part number and displays the inventory part number and item name if the customer part number is found.
Entered	Entered			Searches for customer part number, ignores other entries and displays the inventory part number and item name if the customer part number is found.
Entered	Entered	Entered		Search for customer part number, ignores other entries and displays the inventory part number and item name if the customer part number is found.
Entered	Entered	Entered	Entered	Searches for customer part number, ignores other entries and displays the inventory part number and item name if the customer part number is found.
	Entered			Displays an error message indicating that the cross reference part number must also be entered.
	Entered		Entered	Displays an error message indicating that the cross reference part number must also be entered.

Customer Part Number	Cross Reference Type	Cross Reference Part Number	Inventory Part Number	Processing Rule
	Entered	Entered		Searches for cross reference part number within the context of the cross reference type, and if found, displays the inventory part number and item name.
	Entered	Entered	Entered	Searches for cross reference part number within the context of the cross reference type and ignores inventory part number. If found, displays the inventory part number and item name.
		Entered	Entered	Searches for cross reference part number and ignores inventory part number. If found, displays the inventory part number and item name.
			Entered	Searches for the inventory part number. If found, displays the inventory part number and item name.

- Oracle iStore populates the primary UOMs and item names into the form. (If the user clicks **Add to Cart** before pressing **Fill Details**, the primary UOM is defaulted for items.) If the profile option, IBE: Retrieve all Units of Measure for an Item, is set to Yes, the user can select different values for UOMs.

Note: To increase the default number of rows in the form, set the profile options, IBE: Additional Table Rows and JTF_PROFILE_DEFAULT_NUM_ROWS. See the "Implementing Direct Item Entry" section, below, for details.

- For each item to be added to the shopping cart, the user selects the appropriate item check box and clicks **Add to Cart**. All items selected are added to the user's active cart. Items not selected are not saved into the form. However, if the add-to-cart action fails, the user is returned to the Direct Item Entry form with values intact.
- The user proceeds with checkout.
- The customer item number or the cross reference part number entered in the Direct Item Entry page is passed to Oracle Order Management.

Process Flow for Uploading Comma Separated Values File

To populate the Direct Item Entry form, users can upload a comma separated values (.csv) file containing relevant values for customer part number, Oracle Inventory part number, UOM, and quantity. The .csv file must contain a customer part number, a cross reference part number, **or** an inventory part number. If the file contains neither UOM nor quantity, Oracle iStore defaults these values to primary UOM and 1 (for quantity), respectively. If neither the customer part number nor Inventory part number for an item are specified in the file, the Direct Item Entry form ignores the item, and does not upload any data for it.

The process flow for Direct Item Entry using a .csv file is as follows:

1. A registered B2B user logs into a specialty site, selects the Direct Item Entry action from the Shopping Cart page and clicks **Go**. The Direct Entry Form appears.
2. The user clicks **Upload** to retrieve the Upload Items page. From this page, the user selects the appropriate .csv file from the file system.

Note: The number of items that can be uploaded at a single given time is determined by the profile option, IBE: Maximum Direct Entry Rows.

3. The user clicks **Apply** to upload the file and validate the item information. Oracle iStore addresses common file errors as follows:
 - If the file is corrupted, Oracle iStore displays an error message in the Upload Items page, and the file will not be uploaded.
 - If invalid part numbers are found, Oracle iStore displays an error message in the Direct Item Entry page.
 - If the user specifies an invalid UOM in the .csv upload file, the primary UOM is selected.
4. For each item to be added to the shopping cart, the user selects the appropriate item checkbox and clicks **Add to Cart**. Items are added to the user's active cart. Items not selected are not saved into the form. However, if the add-to-cart action fails, the user is returned to the Direct Item Entry form with values intact.
5. The user proceeds with checkout.

See also: "Set up Comma Separated Values File" section, below

Implementing Direct Item Entry

To set up Direct Item Entry, follow the steps below. These steps assume a site has been implemented and contains valid products -- only items that can be purchased via the site catalog are considered valid items. The steps are:

- Step 1 - Set Mandatory Profile Option
- Step 2 - Set Optional Profile Options
- Step 3 - Set up Item Mapping
- Step 4 - Set up Comma Separated Values File

Step 1 - Set Mandatory Profile Option

Set the following mandatory profile option: IBE: Use Direct Item Entry --- Set to Yes. See the appendix, Profile Options, page A-1, for more information on the profile option.

Step 2 - Set Optional Profile Options

Set the following profile options according to your business requirements:

- **IBE: Additional Table Rows:** Determines the number of rows to add when a user selects Add More Rows. Set to a reasonable integer.
- **IBE: Maximum Direct Entry Rows:** Sets the row limit for the form; also sets the maximum items that can be uploaded via .csv file.
- **IBE: Retrieve all Units of Measure for an Item:** Allows multiple UOM value retrieval. Set to Yes, so that all UOMs can be retrieved for items. For more information, refer to the table below, "Using Profile Options to Display UOMs".
- **JTF_PROFILE_DEFAULT_NUM_ROWS:** Determines the default number of rows displayed in the Direct Item Entry form. Set at site level to a reasonable integer.

Note: The profile option, IBE: Use Price List Associated with Specialty Site, also affects the display of UOMs in the Direct Item Entry. The following table details the behavior.

Using Profile Options to Display UOMs

If IBE: Retrieve All UOMs for an Item is set to...	And if IBE: Use Price List Associated with Specialty Site is set to...	UOM Display Behavior
Yes	No	Oracle iStore displays all UOMs defined in Inventory for the item. These UOMs are displayed irrespective of whether they have valid prices or not.

If IBE: Retrieve All UOMs for an Item is set to...	And if IBE: Use Price List Associated with Specialty Site is set to...	UOM Display Behavior
Yes	Yes	Oracle iStore displays all UOMs defined in Inventory for the item. It verifies whether each UOM has a valid price.
No	Yes	Oracle iStore displays only primary UOM defined in the price list for the item. It does not check whether UOM has valid price.
No	No	Oracle iStore displays only primary UOM defined in price list for the item. It does not check whether UOM has valid price.

Caution: Performance issues (slow loading of catalog pages) can occur if IBE: Retrieve All Units of Measure for an Item is Yes. The performance issues can happen because, when the profile is Yes, a pricing call is made for each UOM of each item in the price list.

Step 3 - Set up Item Mapping

Optionally, set up Item Mapping in Oracle Inventory. Before B2B customers can use their companies' internal part numbers for Direct Item Entry, mappings must be established between the customer items and the merchant items in Oracle Inventory. For directions, refer to the *Oracle Inventory User's Guide*.

Step 4 - Set up Comma Separated Values File

This section contains information regarding the use of the .csv file upload utility.

The format of the .csv file can be defined in two ways:

- Create Header Containing Pre-Defined Codes (see below)
- Utilize Pre-Defined Fixed Format (see below)

See also: "Rules for Using Either Format" section, below

Create Header Containing Pre-Defined Codes

When using a header containing pre-defined codes to identify columns, the codes map to the following meanings, as shown in the following table.

Codes and Meanings for .Csv File

Code	Description
CUST_NUM	Customer part number
CROSS_REFERENCE_TYPE	Cross reference type
CROSS_REFERENCE_PART_NUM	Cross reference part number
INV_NUM	Inventory part number
UOM	Unit of Measure
QTY	Quantity

The user can create a header row using the codes in the order desired. The codes are case sensitive. If using this method, the header row must contain at least INV_NUM, CROSS_REFERENCE_PART_NUM, or CUST_NUM. The following table shows an example of how these codes could be used in practice in a .csv to populate the Direct Item Entry Form.

Sample Columns for .Csv Upload File

CUST_NUM	CROSS_REF ERENCE_TY PE	CROSS_REF ERENCE_PA RT_NUM	INV_NUM	UOM	QTY
		Corner_desk		Ea	1
CHAIR-STD				Ea	2
	iStore XRef	Kitchen_Hutc h		Ea	3
			RT50104	Ea	4

Note: The .csv file can be created using Microsoft Excel and saving the file in .csv format.

Utilize Pre-Defined Fixed Format

To utilize the fixed format, the .csv file cannot contain a header row. When using this method, the fixed format must be in the following order:

- Customer part number
- Cross reference type
- Cross reference part number
- Inventory part number
- UOM code
- Quantity

Rules for Using Either Format

For either format, the following rules apply:

- UOM code and quantity are optional values in the .csv file for each line entry.
- If the UOM code is not specified, then the valid UOM list for that part number is displayed with primary UOM selected.
- If the customer number is not specified, the Inventory number must be provided, or else the line is ignored.
- If the Quantity is not specified, a default quantity of 1 is used.

Processing Rules for the Pre-Defined fixed Format .csv File:

- The header for the first column must be "CUST_NUM".
- The header for the second column must be "CROSS_REFERENCE_TYPE".
- The header for the third column must be "CROSS_REFERENCE_PART_NUM".
- If the .csv upload file contains data for the cross reference part number, then data for the cross reference type is optional.
- If the .csv upload file does not contain a value for the cross reference type and the cross reference part number is specified, then a search is done to find multiple occurrences of a cross reference part number. If multiple occurrences of a cross reference part number are found, an error message is displayed and rows containing the error are flagged on the Direct Item Entry Page.
- With older versions of the .csv files, the Direct Item Entry .csv file upload facility ignores the columns for the CROSS_REFERENCE_TYPE and

CROSS_REFERENCE_PART_NUM if they do not exist in the .csv upload file.

- The user must upload the old format .csv file with headers. The old format .csv file without headers (pre-defined format containing 4 columns) is no longer supported.

Shopping Cart Sharing

This section contains topics related to shopping cart sharing for Oracle iStore's Customer UI.

Cart Sharing Overview

Oracle iStore's shopping cart sharing functionality allows multiple users to shop and purchase products collaboratively, utilizing the same shopping cart. Cart sharing has the following main features:

- **Collaborative purchasing:** All Customer UI registered users -- both B2B and B2C users -- can share shopping carts with any number of other iStore users. This enables multiple users to make changes to a shopping cart (depending upon their share cart roles). The updates can be seen in real-time by other users sharing the cart. Cart members with appropriate permissions can then place an order with the cart.
- **Available to B2B and B2C users:** - The functionality is available to both B2B and B2C users, with the following rules:
 - B2B users are only allowed to share carts with other registered users within their organization who use the same account number; and, the search utility will only retrieve users matching this criteria.
 - B2C users can share carts with any other user who has a valid e-mail address. Recipients must be registered Oracle iStore users, however, to update the shared cart.
- **E-mails keep members informed of activity:** Several Oracle iStore notification event e-mails keep members informed about shared cart actions. For example, when the administrator stops sharing a cart or an order is placed with a shared cart, all recipients are notified by e-mail that the cart is no longer available. The e-mails are sent automatically to the member (provided the sharing member selects the Notify checkbox in the screen), through integration with Oracle Workflow. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for a list of and details about these notification events.
- **Shared cart roles:** The user who initiates a shared-cart action is the cart owner, usually with administrator privileges. Only members with cart administrator role can stop sharing a cart or set roles for the other members. Users who are receiving

the shared carts are called cart participants or viewers, depending upon their roles. See the "Shared Cart Roles" section, for more information.

- **Available for all cart types and statuses:** Carts can be in active or saved status to be shared. A cart can be shared in the shipping/billing, end customer, and order review pages as well.
- **Flexibility:** At any time, a cart administrator can delete the cart, add/remove recipients, or place the order. Members are automatically notified when a shared cart is deleted or when the administrator has stopped sharing the cart (provided the administrator has elected to notify the members by selecting the Notify checkbox next to the member's name in the UI).
- **Ability to re-share carts:** B2B users can re-share shopping carts with other Oracle iStore users. Owners of shared carts can update cart members and member roles at any time.

See the "Shared Cart Behavior" section for additional information.

Shared Cart Behavior

The following points describe shared cart behavior:

- Cart members perform cart activities after selecting an action from the Actions drop-list (available in the Carts and Shared Cart Details pages) and pressing Go. If a member selects an action for which he does not have permission, an error message will be displayed.
- If a user has a cart with items in it before signing in, and after sign-in -- if the last active cart was a shared cart -- then the shared cart will become de-activated (i.e., saved), and the user will continue to have the unsaved cart as the active cart.
- For B2B users, only other site users within their organization and using the same account can be the recipients of a shared cart.
- B2C users can share with anyone who has a valid e-mail address. These users do not need to be registered Oracle iStore users to receive the notification e-mail and view the cart, but will need to register to update the cart in any way.
- In order to update a shared cart, a user must be a registered Oracle iStore user.
- Where a B2B user does not have an e-mail address in the system, the member sharing the cart can specify an ad hoc e-mail address for the user. This e-mail address will be used to send an e-mail to the user, but it will not be entered into the personal information section. This allows the member to know that a cart has been shared with him, and lets him add the desired e-mail address for his recorded contact information.

- Field-level validations are done on e-mail addresses entered. When entering e-mail addresses, users should use standard e-mail format.
- When searching for members, there is no need for users to utilize a wildcard in the search textbox -- they can simply enter text and select Go. There is no search mechanism for B2C users.
- Cart retrieval by B2C users is always done using the URL in the e-mail notification message, or by entering the unique cart retrieval number in the Carts page within the Cart menu. For B2C users, the cart retrieval textbox always appears in this page.
- Cart retrieval by B2B users is always done via the URL in the e-mail notification message, or by accessing the *Carts Shared With You* area of the Carts page within the Cart menu.
- For backward compatibility with the Sharee Number of previous Oracle iStore releases, a profile option can be set to enable B2B users of previous releases to use a Sharee Number. This allows the B2B recipient to enter the Sharee Number from a notification and retrieve the cart. See the section, "Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option", within this chapter, for details.
- Only specific users can request sales representative assistance or reject Terms and Conditions -- see the section, "Requesting Assistance or Rejecting T&Cs with Shared Carts", within this chapter, for details.
- All members get e-mail messages with details of the shared cart, if the user sharing the cart elects to notify them by selecting the Notify checkbox next to the member's name in the UI. The e-mail notifications leverage Oracle iStore's integration with Oracle Workflow. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for more information.
- In a B2B scenario, recipients with the Administrator role can delete carts shared with them. In a B2C scenario, administrators cannot delete carts shared with them. Note that if the user is working with an active quote, he will not be able to delete it.
- Cart pricing is done based on the sold-to customer who is the owner of the cart.
- Shared cart expiration behaves the same way as any saved cart. See the section, "Shopping Cart Expiration Values", for more information.
- If a shared cart is active, user can select Save Cart, and the shared cart will be deactivated. A new cart will be created for the user when an item is added. The deactivated cart will still be available in the list of shared carts.
- Multiple members can activate and work on a shared cart simultaneously. Changes made to the shared cart are immediately visible to the owner and all members.

- Members of a shared cart have access to attachments added to the cart by the owner.
- Shared carts can be duplicated, as with non-shared carts. See the section, "Duplicating Shopping Carts", within this chapter, for more information.

Shared Cart Roles

The following are the B2B and B2C share cart roles:

- Administrator
- Participant
- Viewer

The names and descriptions of these seeded values can be changed. See the chapter, *Implementing Messages and Prompts*, page 16-1, for details.

Important: Actions that B2B cart administrators can perform in most cases do not apply to B2C cart administrators. For B2C users, only the cart *owner* has full permissions to perform actions with a shared cart. B2C cart administrators have lesser permissions than B2B cart administrators.

The following table discusses roles and the actions the users can perform.

Share Cart: Roles and Permissions

Role	Permissions
Administrator	<ul style="list-style-type: none">• Place order with the cart/quote• Remove/modify existing members of the cart/quote *• Change roles of members *• Add comments/notify members• Add new members to the cart/quote *• Stop sharing carts/quotes *• Re-share cart/quote *• Delete carts (but not quotes) *• Request sales assistance for carts/quotes *• Disagree with terms and conditions• Track order placed with cart/quote *• Duplicate carts
Participant	<ul style="list-style-type: none">• Update carts/quotes• Add comments/notify members• Review terms and conditions• Duplicate carts

Role	Permissions
Viewer	<ul style="list-style-type: none"> • View carts/quotes • Add comments/notify members • Review terms and conditions • Duplicate carts <p>* B2B admins only; B2C must be cart owner</p>

Note that cart owners (the user who initiates the cart sharing) always has at least administrator permissions.

Sharing Carts

The process flow for sharing carts is as follows.

1. A customer visits a site and adds items to the shopping cart.
2. The customer selects the Share Cart action to begin the sharing process. This retrieves the Share Cart page. The Share Cart page shows all cart items, customer name and address, and shipping and billing information. In this page, the customer must enter a cart name.
3. Selecting members and setting member roles is different for B2B and B2C cart owners:
 - **B2B Users** --- In the Share Cart page, a B2B user selects the Add Member button. Using the Search and Select: Members page, he searches for users within his organization using the same financial account. Oracle iStore automatically adds a wildcard to the end of any criteria entered, and searches on the *first name field* of Contact Name.

From the search results, he selects the applicable members, and is returned to the Share Cart page, where he selects roles for each member.

Important: Other B2B members on the cart also must have access to the same financial account as the owner's session account when he initially shared the cart -- if they do not, they will not be able to update the cart.
 - **B2C Users** --- The B2C customer will see a different version of the Share Cart page. For the B2C customer, there is no Add Member button -- instead, B2C customers simply enter in textboxes the names and valid e-mail addresses of

the members in the Share Cart page, and then select the appropriate roles for the members.

4. Once the members have been chosen and their roles set, in the Notify column of the Share Cart page, the owner can choose to notify all members on the cart or only specific members. A mark in the Notify checkbox means that the member will receive an e-mail informing him about the shared cart.
 - E-mail notifications leverage Oracle iStore's integration with Oracle Workflow. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for details.
5. In the Comments field of the Share Cart page, the owner can enter comments to include with the e-mail notification. Only members who have had their Notify checkbox marked will receive the e-mail and the comments.
6. The owner selects the Apply button to complete the share process, and Oracle iStore displays a confirmation message.

All B2B administrators on the cart can subsequently re-share this cart. See the section, "Re-sharing Carts", for more information.

See the section, "Shared Cart Roles", within this chapter, for information about shared cart roles and the permissions allowed by each role.

Re-sharing Carts

After a cart has been shared, B2B members with the administrator role can re-share the cart. Only B2C cart owners can perform this type of action with a shared cart.

The process flow for re-sharing carts is as follows.

1. An administrator accesses the Edit Member page for a shared cart. This page can be accessed as outlined in the section, "Retrieving Shared Carts", within this chapter.
2. In the Edit Member page, the administrator selects the Add Member button to access the search screen for users within his organization.
3. From this point, the flow is identical to sharing a cart for B2B users. See the section, "Sharing Carts", within this chapter.

Retrieving Shared Carts

Following is the shared cart retrieval flow for recipients -- notice that the process is somewhat different for B2C members:

- **Using the e-mail notification:** The shared cart e-mail notification message supplies a hyperlink which retrieves the Shared Cart Details page for a specific cart. For B2C

users, the cart details appear without requiring the user to log in. For B2B users, the user must log in to view the cart. To update, re-share, or check out with the cart, both B2B and B2C users must log in. This method can be used by both B2C and B2B users.

- **Using the Carts page:** Users can access the Carts Shared With You area of the Carts page to retrieve shared carts.
 - B2B users select a cart name hyperlink, and then log in, to view the Shared Cart Details page. Note that from the Carts page, B2B users also can access several cart actions for shared carts; it is not required to view the Shared Cart Details page to perform the following actions (providing their shared cart role allows it and the related functionality has been implemented):
 - Express Checkout
 - Update Cart
 - Duplicate Cart
 - Edit Member
 - Stop Sharing
 - Remove Cart Access
 - Delete Cart
 - B2C users enter a cart retrieval number provided in the e-mail notification. (When a user shares a cart, a unique cart retrieval number is generated for each recipient. The owner can see the cart retrieval number in the Share Cart Confirmation page and in the Carts page.)
- **Using the Welcome Bin:** Customers also can select the Retrieve Saved/Shared Carts link in the Welcome Bin; this retrieves the Carts page.

To see examples of the Carts page for B2B and B2C users, see the following figures: "Carts Page - B2B Users" and "Carts Page - B2C Users".

See also:

- "Additional Rules and Guidelines for Shared Cart Members" within this chapter
- "Process Flow for Cart Sharing and Retrieval" within the chapter, Customer Application Process Flows, page 37-1

Shared Cart Details Page Activities

Customers can access the Shared Cart Details page via one of the methods described

above. Following are the activities users can perform from these pages (providing their shared cart role allows it and the related functionality has been implemented):

- Express Checkout
- Update Cart
- Duplicate Cart
- Edit Member --- This action allows the owner to modify user roles and re-share the cart.
- Stop Sharing --- This action removes access to the cart by all but the person stopping the sharing.
- Remove Cart Access --- This action allowing a recipient to cancel his participation in the shared cart activity is not displayed in the Carts Shared by You case.
- Delete Cart

Refer to the "Common Shopping Cart Elements" section earlier in this chapter for more information on the above actions not explained here.

Requesting Assistance or Rejecting T&Cs with Shared Carts

Sales representative assistance is available for shared carts, providing the functionality has been implemented -- see the chapter, Implementing Customer Assistance, page 15-1.

The following points describe the application behavior with this functionality:

- All members can review Terms and Conditions (T&Cs) on a shared cart, but only shared cart administrators (both B2B and B2C) can request sales assistance or reject T&Cs.
- When a member requests sales assistance, an e-mail notification is sent to the sales representative, following standard sales assistance functionality. The notification includes the contact information (phone number and e-mail) of the requestor.
- Any comments entered by the requestor are sent to the sales representative, but are not seen by the cart owner (unless the owner is the requestor).
- After a member requests sales assistance, all members are assigned the Viewer role except the requestor and the owner (who could be the same user); these users keep their current role. Further:
 - Any member whose role was changed to Viewer receives an e-mail notification telling him his access level was changed.

- Any member who was already a viewer will get a generic shared cart e-mail notification, saying something to the effect, *User X has suggested that you review the cart.*
- If the sales assistance request comes from a user who is not the cart owner, the owner also receives this generic e-mail notification.
- When an administrator who is not the cart owner requests sales assistance or rejects T&Cs, other members on the cart can no longer update it --- at this point, only the cart owner and the administrator who requested assistance/rejected T&Cs can update the cart.

Note: Updateable portions of quotes depend on the profile option, IBE: Allow Update for Draft Quotes. See the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information.

See also: The section, "Terms and Conditions" in the chapter, Integrating Oracle iStore with Oracle Sales Contracts, page 30-1.

Additional Rules and Guidelines for Cart Sharing

This section contains information about rules and guidelines related to share cart members.

Rules and Guidelines for Recipients

Following are some additional guidelines regarding recipients:

- Even if a B2B user has the appropriate shared cart role to checkout or place an order with a shared cart, he also must have the appropriate permissions in his user role to checkout or place an order. These permissions are: IBE_CHECKOUT and IBE_CREATE_ORDER.
- When a B2B recipient retrieves a cart by selecting the link in the e-mail notification, and then logs in to update the cart, the system will check that his current account number matches the one that the owner used when initially sharing the cart -- if these do not match, an error occurs.
- For B2C users, only the owner of the cart can track the order from Order Tracker. B2C recipients cannot track orders from shared carts.

Rules and Guidelines for Administrators

Following are some additional guidelines regarding administrators:

- Actions that B2B cart administrators can perform in most cases do not apply to B2C cart administrators. For B2C users, only the cart owner has full permissions to perform actions with a shared cart. B2C cart administrators have lesser permissions

than B2B cart administrators. See the table, "Share Cart: Roles and Permissions", within this chapter, for more information.

- If a recipient administrator places an order with the cart, both he and the cart owner receive the order confirmation e-mail notification. All other recipients receive notification that they cannot access the cart any longer.
- If a B2B recipient administrator places an order with the cart, he will be able to track the order. The B2B owner also will be able to track the order, provided:
 - The profile option, IBE: Use Auth Permissions in Order Tracker, is off; or
 - The profile option is on and the owner has the IBE_VIEW_ORDER permission in his user role.
- For B2C users, only the owner can track the order from Order Tracker. B2C recipients cannot track orders from shared carts.

See the section, "Requesting Assistance or Rejecting T&Cs with Shared Carts", within this chapter, for information on this functionality for cart administrators.

Pricing and Payment Rules for All Shared Cart Users

The following table describes pricing/payment modification activities and behavior for all users with shared carts.

Pricing and Payment Rules for All Shared Cart Users

Cart Attribute	Modification Rule - B2B Users	Modification Rule - B2C Users
Sold-to customer and contact	Since a cart can only be shared within the organization, the sold-to customer will never change. The sold-to contact for a shared cart will always be the cart owner, even if a recipient places a shared cart as order.	Sold-to customer and contact is always the owner, even if a recipient places a shared cart as an order.
Cart pricing	Prices are based on the sold-to customer	Cart prices are based on sold-to customer.
Promotion codes	During checkout, promotion codes are validated against the sold-to customer.	Promotion codes are validated against the sold-to customer.

Cart Attribute	Modification Rule - B2B Users	Modification Rule - B2C Users
Pricing agreements	During checkout, pricing agreements are validated against the sold-to customer.	n/a
Payment information	During checkout, recipients can specify payment information from the payment book available to them. Payment information entered by recipients will not be linked to the cart owner	Recipients and owners can specify payment information from the payment book available to them. Payment information entered by recipients will not be linked/copied to the cart owner.

Quote Sharing

Quotes are available in the Customer Application under the Quotes subtab within the Cart menu. The Quotes summary page lists all of a user's quotes, including shared quotes. Quotes can originate from shopping carts that become quotes when a customer requests sales assistance or rejects T&Cs. Quotes also can be published to a customer through the quote publishing feature of Oracle Quoting.

Also refer to the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1.

Shared Quote Behavior

Following are rules and guidelines for shared quotes:

- Quotes have the same behavior as shopping carts in terms of member rules. However, quotes cannot be deleted.
- If the profile option, IBE: Allow Update for Draft Quotes, is Yes, quotes can be updated and utilized in the same manner as carts. If the profile is off, only payment type information can be changed. Even if the update quote feature is enabled, the quote must follow certain rules for users to be able to update it.
- In the Quotes page, quotes are organized by type, with the most recently created quote appearing first in its section.
- Just as with the Carts page, the Quotes page is different for B2C and B2B users.
- Other rules apply to quotes as well. See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, for more information.

Sharing a Quote

To share a quote, both B2B and B2C users select the Share Quote action from the Quotes or Quote Details pages. After this action, the quote sharing process is identical to cart sharing. Remember, however, that updating quotes is only allowed when the profile option, IBE: Allow Update for Draft Quotes, is Yes.

Retrieving a Shared Quote

Retrieving a shared quote is identical to retrieving a shared cart, except that the Quotes page is used to access the quotes. Quotes also can be retrieved via the Shared Quote e-mail notification.

Shared Quote Details Page Activities

The Shared Quote Details page can be accessed by selecting the hyperlink of a shared quote in the Quotes page, or through access to a Shared Quote e-mail notification, which contains a link to the Shared Quote Details page. Following are the activities the user can perform in this page:

- Copy to Cart
- Express Checkout
- Update Quote
- Edit Member --- This action allows the user to re-share the quote and/or change member access rules.
- Stop Sharing
- Remove Quote Access --- This action allowing a user to end his participation in the shared quote activity is not displayed in case of Quotes Shared By You.
- Delete Quote

Implementing Shared Carts

Two profile options affect the shared cart functionality, as discussed in the following sections.

Setting the Cart Sharing Profile Option

To enable shopping cart sharing, set the following profile option: IBE: Use Sharecart Functionality. This profile option specifies whether cart sharing is enabled in your specialty sites. Set to Yes to enable the functionality. Set to No to disable the functionality.

Setting the B2B Shared Cart/Quote Backward Compatibility Profile Option

For backward compatibility with the Sharee Number of previous Oracle iStore releases, you can set the following profile option to Yes to enable the Cart Retrieval Number textbox in the Carts and Quotes pages: IBE: Cart Retrieval By Number For B2B. For B2B users, this profile option enables a textbox (labelled Cart Retrieval Number) in the Carts and Quotes pages. B2B users can enter a Sharee Number from previous iStore releases to access carts previously shared.

Note that this profile does **not** control the cart retrieval textbox for B2C users.

Checkout and Order Placement

The following sections discuss features and functionality related to checkout and order placement.

Checkout and Order Placement Overview

Oracle iStore ships with full checkout and order placement capabilities in the Customer Application. Following are some of the major features of the Customer Application checkout and order placement:

- Each step of the checkout flow is identified using a breadcrumb train. The train lets the user know where he is in the checkout process.
- If Smart Checkout is enabled and all of the required customer information is correctly pre-populated, customers can navigate directly to the order review page and skip shipping and billing information.
- If Express Checkout is enabled and the customer has a valid credit card stored in his payment book, he can select orders that are later submitted as a batch job using a concurrent program.
- Implementers have the option of mandating that B2B customers enter their contact information during the checkout flow.
- From the order review page, customers can change shipping, billing, end customer and additional information. In the case of B2B users, this functionality depends upon the permissions assigned to the user's role, giving implementers flexibility in the functionality allowed these users.
- Integration with Oracle Sales Contracts and Oracle Quoting allow implementers to set up Terms and Conditions and sales representative assistance during the checkout flow.
- Oracle iStore automatically defaults shipping and billing information into the cart during the checkout phase.

- If the shopping cart contains only non-shippable items, the shipping page is skipped. The shipping information might be defaulted through defaulting rules, so the shipping information will still be displayed in the order review page. If at least one item is shippable, or one ATO/PTO model is added to the cart, then the shipping page will be displayed.
- Shipping, billing and end customer information is defaulted based on hard-coded defaulting rules. The user interface provides mechanisms (e.g., drop-lists and checkboxes) to allow the user to set additional billing, shipping, and end customer information based on values already entered in the order.
- Users can perform the following shopping cart actions: Request Help, Save Cart, and Share Cart, at any step of the checkout flow, not only from the shopping cart page.
- The order review page shows additional attributes of the shopping cart and checkout pages, such as additional information at cart and item levels, if populated, and end customer at cart and item levels, if enabled.
- Customers can set shipment priority, ship items to different addresses, and enter different billing information for different items, if this functionality is enabled.

Note: Some of the functionality in this section discussed requires integration with Oracle iStore dependencies and assumes you have performed the required setup tasks.

For business process flows related to checkout and order placement, see the Customer Application Process Flows, page 37-1, chapter.

Checkout Flow Trail

Each step of the checkout flow is identified using a breadcrumb trail. The trail lets the user know where he is in the checkout process. The possible trail steps (depending upon the functionality implemented) are:

- Shipping
- Billing and Payment
- End Customer
- Terms and Conditions
- Review and Place Order

If Terms and Conditions and End Customer information (B2B only) are not enabled, the corresponding trail steps are not displayed. The trail steps are not clickable; instead, customers can navigate between the checkout flow pages using the Back/Next buttons in the UI. Each time the user selects a Back or Next button, the information in the page

is saved, unless it is sensitive information (credit card numbers are scrambled, except for the last four digits). When the user selects Cancel he is returned to the Shopping Cart page, except in the case of a quote that is not updateable. In this case, the Cancel button takes the user back to the Quote Details page. When the user performs an action that takes him one or more steps off the trail, the step the user is currently in is highlighted, while all the other steps are grayed out.

Whether or not the shipping page is skipped depends on the item type:

- **Standard items:** Assuming the Shippable flag is checked in Inventory, the user will go through the shipping page.
- **Configured and model items:** If there are any standard configured items/model bundles (non-network containers) in the cart, the user will always go through the shipping page.
- **Network containers:** Network containers refer to telecommunications service ordering (TSO) items; see the *Oracle Telecommunications Service Ordering Process Guide* for more information. When the cart lines are displayed in the various pages (e.g., Shopping Cart, Saved Cart Details, Shared Cart Details, Saved Quote Details, etc.), the system will check the shippable attribute for the children of the network containers. If one of the items under the network container is shippable, then the user will go through the shipping page. When the cart lines are not displayed (e.g., as in Carts and Quotes pages) the system will not check the Shippable attribute for a network container's child items. In this case, the user will always go through the shipping page.

Note: The display of Terms and Conditions (T&Cs) content can depend on system variables. Thus, if user changes shipping, billing, end customer, and quantity information in the order review page, the T&Cs can be affected. Users are able to branch out of the checkout flow in the order review page to review and accept T&Cs after they have changed. If the profile option, IBE: Enforce Terms and Conditions Review by User, is Yes and the user branches out from the order review page, the place order button is disabled and the user needs to accept the T&Cs again before he is allowed to place the order.

Shopping Cart Defaulting During Checkout

In the Oracle iStore Customer UI, as the user goes through the checkout process, Oracle iStore defaults certain information into the users' checkout pages. This information includes shipping and billing information related to the user.

Shopping cart defaulting both improves the performance of the checkout flow, and improves the defaulting capabilities of Oracle iStore. The feature defaults in the shipping addresses, billing addresses, primary credit card, and preferred shipping method of the user when the user adds the first item to the cart.

The following are the triggers that activate cart defaulting:

- A signed-in user creates a cart by adding an item to it
- A guest user has items in an active cart and then signs in

Defaulting for Shipping Data

The following shipping fields are populated when shipping information defaulting occurs:

- **Shipping Method:** If the user has a preferred shipping method and has a primary shipping address, then the preferred shipping method is defaulted into the cart. If the user does not have a preferred shipping method, then it can be set by the user within the Profile menu. The preferred shipping method also is set when a user who does not have a preferred shipping method checks out with his first cart and chooses a shipping method. This shipping method then becomes the user's preferred shipping method. In all cases, the existing validation of shipping methods per site, and those applicable for the current organization, will be done. When a cart is created and the shipping method is not defaulted to the cart, the first available shipping method is defaulted to the cart. This behavior occurs only if the user's preferred shipping method is not set and the profile option, IBE: Preferred Shipping Method, is not set.
- **Ship to Customer:** In a B2C case, the logged in person is always the default ship-to customer. In a B2B case, the organization of the logged-in user is the default ship-to customer.
- **Ship to Contact:** In both B2C and B2B cases, the logged in user is the default ship to contact.
- **Ship to Address:** If the user already has a default (preferred) shipping address, Oracle iStore will use that address as the default shipping address for the cart, provided the user also has a preferred shipping method. Otherwise, the user can create a new address in the checkout process. The address used in the first order placed by the user becomes the default ship-to address, and will be defaulted the next time. If the contact does not have a primary shipping address and there is a primary address for the company, the primary company address is defaulted.

Defaulting for Billing Data

The following billing fields are populated when billing information defaulting occurs:

- **Bill to Customer:** In a B2C case, the logged in person is always the default bill-to customer. In a B2B case, the organization of the logged-in user is the default bill-to customer.
- **Bill to Contact:** In both B2C and B2B cases, the logged in user is the default bill to contact.

- **Bill to Address:** If the user already has a default (preferred) billing address in the address book, Oracle iStore will use that address. Otherwise, the user can create a new address during the checkout process. The bill-to address used in the first order placed by the user becomes default bill-to address, and will be defaulted the next time. If the contact does not have a primary billing address and there is a primary address for the company, the primary company address is defaulted.
- **Payment Method:** If the user has a default credit card and the merchant has set up that credit card type as a valid form of payment in the specialty site the user is in, then the default credit card is defaulted into the cart as the payment option when the user adds the first item to a new cart.

If this defaulting does not take place, then New Credit Card is displayed as the payment option on the billing and payment checkout page. If credit card is not enabled by the merchant as a payment type, then Invoice, Cash and Check (in this order) will be chosen, depending on which payment types have been enabled by the merchant. If the user does not have a default credit card in his profile and creates a new credit card, the new credit card is used in the checkout process and becomes the default credit card; this card then will be defaulted the next time.

Deleted (Invalidated) Addresses in Shopping Carts

Once a B2B or B2C user places a shipping or billing address into his shopping cart, Oracle iStore will keep these addresses in the cart even if these addresses get deleted (invalidated) before the user checks out with the cart. This ensures that users never are allowed to checkout without addresses in their shopping carts.

This rule applies to:

- B2C billing and shipping addresses
- B2B contact person billing and shipping addresses
- B2B party site addresses
- Addresses in shared shopping carts
- Addresses deleted through the user's Address Book (within the Profile menu)
- Addresses deleted through the Express Checkout preferences menu
- Addresses invalidated through Oracle Forms

The following shopping cart checkout flow examples illustrate the rule:

Standard Checkout:

1. A user add items to the cart and proceeds to checkout.

2. The user picks a shipping and a billing address to use in the cart.
3. The user switches to the Profile menu's Address Book and deletes the shipping and/or billing address used for the cart.
4. The user returns to checkout with the same cart -- the shipping and/or billing address continue to appear in the shipping and billing section cart-level settings.

Checkout with a Shared Cart:

1. A user adds items to the cart.
2. The user proceeds to checkout and shares the cart with another recipient.
3. The user picks a shipping and a billing address to use in the cart.
4. The user switches to the Profile menu's Address Book and deletes the shipping and/or billing address, and then logs out.
5. Recipient of the shared cart retrieves the cart and checks out with it -- the shipping and/or billing addresses continue to appear in the shipping and billing section cart-level settings.

Express Checkout:

1. A user enters shipping and billing address information in Express Checkout Preferences page.
2. The user places items in his shopping cart for automatic retrieval by the concurrent program.
3. The user goes to the Express Checkout Preferences page and deletes his express checkout billing and/or shipping address.
4. Express Checkout concurrent program submits the order with the previously-deleted shipping and/or billing addresses.

Pricing Calls During Checkout

Because pricing calls to the database are expensive in terms of application performance, during the checkout flow, Oracle iStore only makes calls to the pricing engine under certain conditions. When a user updates some item in a checkout flow page, Oracle iStore always saves the page, but the pricing call is only made under specific conditions, as described in this section. Note that the system makes a distinction between pricing calls occurring at the order (header) level and those occurring at the item (line) level.

Pricing Calls During B2B Checkout

Oracle iStore calls the pricing engine during B2B checkout as follows:

Shipping Information Page

- Order Level: A pricing call is not made unless next page is the Order Review page. This rule is applicable only if a save operation occurs in the page.
- Item Level: No pricing call is made.

Billing and Payment Information Page

- Order Level: A pricing call is not made unless next page is the Terms and Conditions or Order Review page. This rule is applicable only if a save operation occurs in the page. Oracle iStore does make a pricing call in the case when there is no change in the End Customer Information page, but next page is the Terms and Conditions page.
- Item Level: No pricing call is made.

End Customer Information Page

- Order Level: A pricing call is not made unless next page is the Terms and Conditions or Order Review page. This rule is applicable only if a save operation occurs in the page. Oracle iStore does make a pricing call in the case when there is no change in the End Customer Information page, but next page is the Terms and Conditions page.
- Item Level: No pricing call is made.

Pricing Calls During B2C Checkout

Oracle iStore calls the pricing engine during B2C checkout as follows:

Shipping and Billing Information Page

- Order Level: A pricing call is made is if a save operation occurs in the page.
- Item Level: (This will be a shipping change). A pricing call is made is if a save operation occurs in the page.

Requesting Sales Assistance During Checkout

If a user requests sales assistance in the checkout phase, the cart becomes a quote and the user's sales representative receives an e-mail notification of the request.

Note that a B2B user must have the IBE_ASK_SALES_ASSISTANCE permission in his user role to be able to request sales assistance.

This functionality requires that both Oracle Quoting and the Sales Assistance feature (IBE: Use Sales Assistance Feature = Yes) have been implemented. For more information, see the chapters, Integrating Oracle iStore with Oracle Quoting, page 28-

, and Implementing Customer Assistance, page 15-1.

For information on who can request sales assistance with a shared cart or quote, see the section, "Shopping Cart Sharing".

Rejecting Terms and Conditions During Checkout

If a customer rejects the standard Terms and Conditions (T&Cs) in the checkout phase, the Sales Assistance flow initiates. The cart becomes a quote in Oracle Quoting and also appears for the customer on the Quotes page, Quotes list.

In order to be able to reject T&Cs, a B2B user must have the IBE_ASK_SALES_ASSISTANCE permission in his user role, and the profile option which controls the sales assistance feature, IBE: Use Sales Assistance Feature, must be set to Yes.

For more information, see the chapters, Integrating Oracle iStore with Oracle Sales Contracts, page 30-1, and Implementing Customer Assistance, page 15-1.

For information on who can reject T&Cs with a shared cart or quote, see the section, "Shopping Cart Sharing", within this chapter.

Mandating B2B Contact Information During Checkout

Merchants have the ability to mandate whether B2B users must enter ship to and bill to contact information during checkout. Oracle iStore APIs validate this information against database tables used by Oracle Receivables.

This functionality is enabled by setting the following profile option at the application level for iStore: IBE: Mandate Contacts For Billing and Shipping --- Enter Yes to mandate that B2B users enter contact information before an order will be submitted. Enter No to disable the mandate.

This profile option defaults to No if not set.

A warning message is displayed if the user attempts to continue without providing the required information. The user cannot continue without providing the required information.

Note: B2B users must have the permission, IBE_CHANGE_BILLTO_CONTACT and IBE_CHANGE_SHIPTO_CONTACT, in their user role in order for them to be able to change ship-to and bill-to contact information.

Selection and Creation of Organization Data During Checkout

Organizations can control which users or groups of users are allowed to create and change customers, contacts and addresses (including bill-to and ship-to address usages) during the checkout flow by assigning or removing certain permissions from the B2B user roles assigned to their business users.

Billing Flow Permissions

Following are the permissions which control creating and changing customers, contacts, and addresses from the Checkout: Billing Information page and associated searching and creating pages:

- **IBE_CREATE_BILLTO_CUSTOMER:** This permission controls the Create Customer button in the Search and Select: Bill to Customer page, available from the Checkout: Billing Information page. If the user does not have the IBE_CREATE_BILLTO_CUSTOMER_ADDRESS permission as well, then the search results include only customers who have a bill-to address. When creating a new customer, users can also create contact information for the customer. Once the information is saved, customer name, contact name, and address will automatically be populated. If the user creates a bill-to customer, the bill-to usage for the address is created automatically, before the order is placed. The new customer has a billing relationship to the sold-to customer.
- **IBE_CREATE_BILLTO_CUSTOMER_ADDRESS:** This permission controls the display of the Create Address button in the Search and Select: Bill to Customer page (available from the Checkout: Billing Information page) and the appearance of the Customer Address section in the Create Bill to Customer page (Search and Select: Bill to Customer page, Create Address). In the Create Bill To Address page (Billing Information page Address area, Select button, then Create Address), the Customer Name radio button will only display if the user has this permission. The new address associated with the bill-to customer will have a bill-to relationship with the bill-to customer.
- **IBE_CREATE_BILLTO_CONTACT:** This permission controls the display of the Create Contact button in the Search and Select: Bill to Contact page, available from the Checkout: Billing Information page. The new contact will have a bill-to relationship with the bill-to customer.
- **IBE_CREATE_BILLTO_CONTACT_ADDRESS:** This permission controls the display of the Create Address button in the Search and Select: Bill to Contact screen (available from the Checkout: Billing Information page) and the appearance of the Contact Address section in the Create Bill to Contact page (Search and Select: Bill to Contact screen, Create Contact). In the Create Bill To Address page (Billing Information page Address area, Select, Create Address), the Contact Name radio button will only display if the user has this permission. When a user sets up his Express Checkout addresses, he must have this permission to see the Create Address button in the Preferences (Profile, Preferences, Orders) page. The new address will have a bill-to relationship with the bill-to contact.
- **IBE_CHANGE_BILLTO_CONTACT:** This permission controls the display of the Change button on the Checkout: Billing Information page, allowing a user to change the bill-to contact. A user will only be able to View All Contacts in the Search and Select: Ship to Address page (Billing Information page Address area,

Select) if he has this permission. Also, when the user views all contacts, only billing addresses of the contacts are displayed. This permission works in tandem with IBE_CHANGE_BILLTO_CUSTOMER.

- **IBE_CHANGE_BILLTO_CUSTOMER:** This permission controls the display of the Change button on the Checkout: Billing Information page, allowing a user to change the bill-to customer. When selecting a new customer, the list-of-values displays customer names and account numbers only, not addresses. If you explicitly grant this permission to a user, you should also grant the IBE_CHANGE_BILLTO_CONTACT permission to the user.
- **IBE_BILLTO_ANY_ACCOUNT:** Allows a customer to search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer. Note that "all existing customers" is restricted to customers that have a valid party relationship of type, customer of, with the sold-to customer, as well as any customer that has a billing account relationship with the sold-to customer.
- If the user has neither the IBE_CREATE_BILLTO_CUSTOMER_ADDRESS permission nor the IBE_CREATE_BILLTO_CONTACT_ADDRESS permission, then the search results lists will only include bill-to addresses for both contacts and customers.

Shipping Flow Permissions

Following are the permissions which control creating and changing customers, contacts, and addresses from the Checkout: Shipping Information page and associated searching and creating pages:

- **IBE_CREATE_SHIPTO_CUSTOMER:** This permission controls the Create Customer button in the Search and Select: Ship to Customer page, available from the Checkout: Shipping Information page. If the user creates a ship-to customer, the ship-to usage for the address is created automatically, before the order is placed. When creating a new customer, users can also create contact information for the customer. Once the information is saved, customer name, contact name, and address will automatically be populated. When the user performs query for a customer, the query results will not display addresses because of the performance reason. The new customer will have a shipping relationship with the sold-to customer.
- **IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS:** This permission controls the display of the Create Address button in the Search and Select: Ship to Customer screen (available from the Checkout: Shipping Information page) and the appearance of the Customer Address section in the Create Ship to Customer page (Search and Select: Ship to Customer screen, Create Customer). In the Create Ship To Address page (Shipping Information page Address area, Select, Create Address), the Customer Name radio button will only display if the user has this permission.

The new address associated with the ship-to customer will have a ship-to relationship with the ship-to customer. If the user has only this permission, then the search results include all the address types for the customer and all the ship-to addresses for contact (based on TCA party site use).

- **IBE_CREATE_SHIPTO_CONTACT:** This permission controls the display of the Create Contact button in the Search and Select: Ship to Contact page, available from the Checkout: Shipping Information page. The new contact will have a ship-to relationship with the ship-to customer.
- **IBE_CREATE_SHIPTO_CONTACT_ADDRESS:** This permission controls the display of the Create Address button in the Search and Select: Ship to Contact screen (available from the Checkout: Shipping Information page) and the appearance of the Contact Address section in the Create Ship to Contact page (Search and Select: Ship to Contact screen, Create Contact). In the Create Ship To Address page (Shipping Information page Address area, Select, Create Address), the Contact Name radio button will only display if the user has this permission. When a user sets up his Express Checkout addresses, he must have this permission to see the Create Address button in the Preferences (Profile, Preferences, Orders) page. The new address has a ship-to relationship with the ship-to contact. If the user has only this permission, then the search results include all of the address types for the contact and all of the ship-to addresses for the customer (based on TCA party site use).
- **IBE_CHANGE_SHIPTO_CONTACT:** This permission controls the display of the Change button from the Checkout: Shipping Information page, allowing a user to change the ship-to contact name. A user will only be able to View All Contacts in the Search and Select: Ship to Address page (Shipping Information page Address area, Select) if he has this permission. Also, when the user views all contacts, only shipping addresses of the contacts are displayed. This permission works in tandem with IBE_CHANGE_SHIPTO_CUSTOMER.
- **IBE_CHANGE_SHIPTO_CUSTOMER:** This permission controls the display of the Change button from the Checkout: Shipping Information page, allowing a user to change the ship-to customer. When selecting a new customer, the list-of-values displays customer names and account numbers only, not addresses. If you explicitly grant this permission to a user, you should also grant the IBE_CHANGE_SHIPTO_CONTACT permission to the user.
- **IBE_SHIPTO_ANY_ACCOUNT:** In the shipping information pages, this permission allows a user to search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer. Note that "all existing customers" is restricted to customers that have a valid party relationship of type, customer of, with the sold-to customer, as well as any customer that has a shipping account relationship with the sold-to customer.

- If the user has neither the `IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS` permission nor the `IBE_CREATE_SHIPTO_CONTACT_ADDRESS` permission, then the search results lists will only include ship-to addresses for both contacts and customers.

For information on the End Customer permissions, refer to the section, "Capture End Customer Data During Checkout", within this chapter.

End Customer Permissions

Following are the permissions which control creating and changing customers, contacts, and addresses from the Checkout: End Customer Information page and associated searching and creating pages:

- **IBE_CREATE_END_CUSTOMER:** This permission controls the Create End Customer button in the Search and Select: End Customer page, available from the Checkout: End Customer Information page.
- **IBE_CREATE_END_CUSTOMER_ADDRESS:** This permission controls the display of the Create Address button in the Search and Select: End Customer Address screen (available from the Checkout: End Customer Information page).
- **IBE_CREATE_END_CUSTOMER_CONTACT:** This permission controls the display of the Create Contact button in the Search and Select: End Customer Contact page, available from the Checkout: End Customer Information page.
- **IBE_CREATE_END_CUSTOMER_CONTACT_ADDRESS:** This permission controls the display of the Create Address button in the Search and Select: End Customer Contact screen (available from the Checkout: End Customer Information page) and the appearance of the Contact Address section in the Create End Customer Contact page (Search and Select: End Customer Contact screen, Create Contact).
- **IBE_CHANGE_END_CUSTOMER_CONTACT:** This permission controls the display of the Change button from the Checkout: End Customer Information page, allowing a user to change the end customer contact name.
- **IBE_CHANGE_END_CUSTOMER:** This permission controls the display of the Change button from the Checkout: End Customer Information page, allowing a user to change the end customer. When selecting a new customer, the list-of-values displays customer names and account numbers only, not addresses. If you explicitly grant this permission to a user, you should also grant the `IBE_CHANGE_END_CUSTOMER_CONTACT` permission to the user.

How Account Sites Are Generated with Orders

At order creation, Order Capture (iStore's backend API layer) will create a valid account

site use for the given party site and account number, if none exists. During this process, if the Oracle Receivables (AR) system parameter `auto_site_numbering` is No, then the location field when creating an account site use will be concatenated with the site use code, city, and account site use id. If the AR system parameter `auto_site_numbering` is Yes, then Order Capture APIs (which Oracle iStore uses to pass information to AR) will not populate the field, but instead will let AR generate the value for the Location field (to be the same as the account site use id).

Smart Checkout

Available to B2B and B2C customers, the Smart Checkout feature lets Customer Application users skip the shipping and billing steps in the checkout phase. Instead of entering shipping and billing information during checkout, users navigate directly from the shopping cart to the order review page. The Smart Checkout feature works on basis of shipping and billing information as set up for the sold-to customer in the profile and this information is defaulted into the checkout flow. The customer can set billing preferences in the profile payment page, where only credit card information can be supplied.

Assuming shipping and billing information is set up appropriately for the sold-to customer, this information is defaulted into the checkout flow. If the required information is not populated when the user comes to the Order Review page, an error icon is displayed and the user must enter the required data. If End Customer information is mandated, then end customer data is also required. In a typical flow, the customer reviews the information in the order review page and then places the order; or, the customer can go back to each section and modify the information.

If Terms and Conditions (T&Cs) are enabled with Smart Checkout, the T&Cs page is the first page displayed in the checkout flow (instead of the shipping/billing information page), assuming shipping, billing and end customer information have been populated with default information. When the user agrees with T&Cs, the order review page is displayed.

For newly registered users who likely will not have default address data entered into their profiles, the system will automatically show the shipping or billing page (depending upon which information is lacking), and the user can enter his information into the page before proceeding. Also, the system will pick the first available shipping method (if there is no preferred shipping method for the user) to default into the shipping page.

Smart Checkout is enabled by setting the profile option, IBE: Skip Checkout Steps for Order Placement, to Yes. See the appendix, Profile Options, page A-1, for more information on the profile option.

Express Checkout

Available for all registered users, Express Checkout allows orders to be submitted as batch jobs by using a concurrent program, iStore - Express Checkout Order Submission.

In addition to the concurrent program, the functionality is enabled by setting two profile options.

See the chapter, *Concurrent Programs*, page 35-1, for more information on the concurrent program.

If the credit card verification number is set up as mandatory, implementers should disable Express Checkout functionality. See the chapter, *Implementing Payment Types and Shipping Methods*, page 12-1, for more information.

Express Checkout Process Flow

Note that a B2B user must have the `IBE_CHECKOUT` and `IBE_CREATE_ORDER` permissions in his user role to use Express Checkout.

Following is the process flow for Express Checkout:

1. In Oracle Forms, an administrator sets the profile options discussed in the section, "Setting Express Checkout Profile Options", below.
2. 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.
3. Oracle iStore user sets up Express Checkout preferences:
 - The user enters a valid credit card number and contact information in the Express Checkout Preferences page, and saves the data. The Express Checkout Preferences page is available by selecting Profile, Preferences, Orders in the Customer Application. The system checks for valid addresses and credit card information before saving the settings. An error message is returned if the user has entered invalid information.

Important: For B2B users to create addresses, customers, and contacts, they must have the appropriate permissions (e.g., `IBE_CREATE_SHIPTO_CUSTOMER`, `IBE_CREATE_BILLTO_CUSTOMER`, `IBE_CREATE_BILLTO_CUSTOMER_ADDRESS`, `IBE_CREATE_BILLTO_CONTACT_ADDRESS`, and/or `IBE_CREATE_SHIPTO_CONTACT_ADDRESS`). The Create button will not show in the Express Checkout Preferences page next to the appropriate areas if the users do not have the applicable permissions.
 - The user enables Express Checkout in the Express Checkout Preferences page.
4. Once the user preferences are set up and Express Checkout is enabled, to purchase items through Express Checkout, the user does the following:
 - Selects the Express Checkout button that appears next to products in the catalog pages. This adds the item to the Express Checkout queue.

Note: Express Checkout does not apply to model bundles that have been enabled in Oracle Bills of Material; hence, the Express Checkout button will not appear next to these items.

- Selects the Express Checkout button in the Shopping Cart page. This adds all items in the cart to the Express Checkout queue.
5. The site then forwards the user to the Pending Express Checkout Orders page, where he can cancel the order if desired. If he does nothing, the concurrent program will pick up the order and submit it.
 6. The concurrent program, iStore - Express Checkout Order Submission, automatically picks up the Express Checkout queue and submits the orders.

Setting Express Checkout Profile Options

To use Express Checkout in your Web sites, set the following profile options at the iStore application level.

- **IBE: Use Express Checkout:** This profile option enables the Express Checkout functionality in all of your sites. Set to Yes to enable Express Checkout, or set to No to disable the functionality. The default value is Yes.
- **IBE: Express Checkout Consolidation Time Interval:** This profile option determines the amount of time that an Express Checkout order will remain available to be "added to" before the concurrent program can submit it. The concurrent request, iStore - Express Checkout Order Submission, attempts to submit Express Checkout orders based upon its schedule, e.g., how often the concurrent request is set to be run (every *n* hours, every day, etc.).

Enter values for this profile option in *minutes*. The default value for this profile option is 60 (minutes).

Rules and Guidelines for Express Checkout

Keep the following rules and guidelines in mind for Express Checkout functionality.

- If integrating Oracle iStore with Oracle Application Server Web Cache to cache catalog pages, you should not use Express Checkout in your specialty sites for the following reason:
 - If you set up Oracle Application Server Web Cache to cache your catalog pages and the Express Checkout profile is on at the application level: then, if User 1 has Express Checkout turned on, while User 2 has Express Checkout turned off, User 2 may still be able to see the Express Checkout button in the UI. When User 2 selects the cached Express Checkout button, he will receive an error.

- If you have enabled the Credit Card Verification Number Support feature and made it mandatory, then Express Checkout should not be used.

Checkout Flow Pages

This section describes the pages within the checkout flow. The flow can vary according to the user type and functionality implemented.

Shipping and Billing Information Pages

Oracle iStore displays different shipping and billing pages depending upon whether the user is a B2B or B2C customer:

- B2B customers see a separate shipping and billing information page for each step (shipping or billing). The Checkout: Shipping Information page is the first page B2B customers access after selecting the Checkout button. The Checkout: Billing Information page is the next page following the shipping page.
- B2C users have a combined Checkout: Shipping and Billing Information page.

B2B Shipping Information Page

The B2B Checkout: Shipping Information page elements and features include:

- **Default From LOV:** Users can use the list-of-values to populate the shipping customer, contact, and address from the address information stored for their company.
- **Ship To Customer Information:** The B2B contact's company name displays next to this field. Users can accept the organization defaulted or change or create a new organization
- **Ship To Contact:** The B2B contact name displays, along with his telephone number and e-mail address, if available. The user can accept the default contact name or change or create a new one. The profile option, IBE: Mandate Contacts For Billing and Shipping, can be set to mandate an entry in this field; if the profile option is set to Yes, the Clear button does not display.
- **Ship To Address:** The default ship-to address displays. The user can accept the default ship-to address or change or create a new one. The user also has the following checkbox options in this field: (1) *Use the same for billing*, which defaults the same address into the billing page; and (2) *Use the same for end customer*, which defaults the same address into the end customer page, if Capture End Customer Data functionality is enabled.

Note: If the B2B user does not have the

IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, the Use the same for billing check box is not displayed.

- **Shipping Details:** This area allows users to enter a variety of shipping details and instructions and is enabled through the profile option, IBE: Use Shipping Instructions. Following are the shipping details fields:
 - **Shipping Method** --- Users can select from a drop-list of enabled shipping methods or accept the default method (which is the first value in the drop-list). The list is comprised of the shipping methods enabled for the site in the Site Administration Application.
 - **Shipping Instructions** --- Users can enter shipping instructions into the textbox; these instructions are passed along with the order into the order management system. The shipping instructions textbox only displays if the profile option, IBE: Use Shipping Instructions, is Yes.
 - **Shipment Priority** --- Users can select a shipping priority (High/Medium/Low), based on their perception of the urgency of the shipment. This information is passed along with the order into the order management system. Values for the list come from the Oracle Order Management quick code, SHIPMENT_PRIORITY.
 - **Requested Delivery Date** --- Users can select the delivery date by which they would like to have the order delivered. This data is passed along with the order into the order management system.
 - **Packing Instructions** --- Users can enter packing-related instructions into a textbox. This data is passed along with the order into the order management system.
- **Item Level Shipping:** Implementers can allow users to enter different shipping information for different items by setting the profile option, IBE: Use Line Level Shipping, to Yes. When item level shipping is enabled, the shipping page shows an expandable section entitled *Ship to Multiple Locations*, which displays a table showing each cart item, quantity, UOM, ship to customer and address, and shipping method. The items in the table initially use the cart-level default shipping information, and in this case, the Ship To column reads, *Same as Cart Level*. Splitting multiple quantities of the same item is allowed from the Ship to Multiple Locations area (except for child items in a configuration). To enter shipping details for an item, the user selects the item and presses the Update Shipping Information button to retrieve the Update Shipping Information page. The Update Shipping Information page lets users enter different shipment contacts, addresses, methods, instructions, priorities, delivery dates, and packing instructions for individual items on the order. Though non-shippable items are displayed in the table, these cannot

be selected.

- **Cart Actions:** From the shipping information page, the following cart actions are available: Save Cart, Share Cart (if implemented), and Request Help (if Sales Assistance functionality is implemented).

B2B Billing Information Page

The B2B Checkout: Billing and Payment Information page features and functionality include:

- **Default From LOV:** Users can use the list-of-values to populate the billing customer, contact, address, and payment information from either the information stored for their company or from the information on the shipping information page.

If the B2B user does not have the IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, this drop-down list is not displayed.

- **Bill To Customer Information:** The B2B contact's company name displays next to this field. Users can accept the organization defaulted or change or create a new organization

If the B2B user does not have the IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, the default bill to customer information is displayed

- **Bill To Contact:** The B2B contact name displays, along with his telephone number and e-mail address, if available. The user can accept the default contact name or change or create a new one. The profile option, IBE: Mandate Contacts For Billing and Shipping, can be set to mandate an entry in this field; if the profile option is set to Yes, the Clear button does not display.
- **Bill To Address:** The default bill-to address displays. The user can accept the default bill-to address or change or create a new one. The user also has the following checkbox options in this field: (1) *Use the same for shipping*, which defaults the same address into the shipping page; and (2) *Use the same for end customer*, which defaults the same address into the end customer page, if Capture End Customer Data functionality is enabled.

If the B2B user does not have the IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, the primary bill to address is displayed. The user cannot select an alternate bill to address.

- **Bill to Multiple Locations:** This area (which features show/hide icon functionality) allows users (B2B and partners only) to enter a variety of billing details and instructions and is enabled through the profile option, ASO: Enable Line Level Billing. Following are the billing details fields in Update Item Billing and Payment Information page available from this area: Bill To Customer, Bill To Contact, and Bill To Address. In addition, multiple quantities of the same item can be split (except for child items in a configuration).

- **Payment Information:** This area allows users to select the payment method to be used for the order. It includes all payment types enabled through the Site Administration Application. The primary credit card stored for the organization contact is defaulted; if no primary credit card is stored, the option to create new credit card data is presented; users also can create new credit card data even if a primary credit card is stored and defaulted. If Credit Card Verification Number Support is enabled, the area also includes a field for users to enter the CVV2 number associated with the credit card used in the order. If purchase orders and commitments have been enabled, this area displays the purchase order field and a button enabling users to select commitments. If the IBE: Mandate Purchase Order Number profile option has been set to Yes, the purchase order number field is mandatory.
- **Tax Information:** This area allows users to set a flag telling the system that their order should not be taxed. The Reason Code LOV lets users select from a pre-defined list of reasons, and the Tax Certification Number textbox allows entry of their company's tax exempt certification number.
- **Cart Actions:** From the billing information page, the following cart actions are available: Save Cart, Share Cart (if implemented), and Request Help (if Sales Assistance functionality is implemented).

B2C Shipping and Billing Information Page

Shipping and billing information for B2C customers is combined in the Checkout: Shipping and Billing page. If no shippable items are in the cart, the page is named simply Billing Information. Very similar to the B2B versions, the B2C Checkout: Shipping and Billing page has the following main features and functionality:

Shipping Portion of the Page:

- **Shipping Address LOV:** If the customer has defined one in his address book, the primary shipping address is defaulted. B2C users also may select shipping addresses from a list of values. The list includes all addresses and their usages as set up in Oracle TCA. From the LOV, users also have the option of creating a new address.
- **Shipping Information:** This area contains the same fields and functionality as the B2B Shipping Details area (see B2B Shipping Information Page, above).
- **Item Level Shipping:** Implementers can allow users to enter different shipping information for different items by setting the profile option, IBE: Use Line Level Shipping, to Yes. When item level shipping is enabled, the shipping page shows a hyperlink in an expandable section entitled, *Need to ship to multiple addresses?*, which when selected displays the Ship to Multiple Addresses page. This page shows each item in the cart along with the quantity being ordered. Users can select an item and update it to enter item-level shipping information in the Update Shipping Information page. In addition, splitting multiple quantities of the same item is

allowed (except for child items in a configuration).

Billing Portion of the Page:

- **Billing Address LOV:** If the customer has defined one in his address book, the primary billing address is defaulted, but if not, the shipping address is defaulted. B2C users also may select billing addresses from a list of values, and may choose to default the address from the shipping address. The list includes all addresses and their usages as set up in Oracle TCA. From the LOV, users also have the option of creating a new address.
- **Payment Information:** This area contains the same fields and functionality as the B2B Payment Information area (see B2B Billing Information Page, above), with primary credit card being defaulted into the page.
- **Tax Information:** This area contains the same fields and functionality as the B2B Payment Information area (see B2B Billing Information Page, above).

Cart Actions:

- From the Checkout: Shipping and Billing page, the following cart actions are available: Save Cart, Share Cart (if implemented), and Request Help (if Sales Assistance functionality is implemented).

Splitting Configured Items for Shipping

Customers can split shipping lines for configured items in order to ship to multiple locations. Refer to the chapter, Implementing Payment Types and Shipping Methods, page 12-1, for implementation information about line-level shipping. The line-splitting functionality for configured items creates a copy of the top-level model item and its components, and copies all attributes from the original configuration. This behavior is very similar to the existing behavior of splitting lines with standard items. Here is the business flow:

1. A customer configure items from catalog or shopping cart, using Oracle Configurator, and proceeds to checkout.
2. Using the Ship to Multiple Locations area of the shipping page, the user can split configured items that have a quantity greater than one. Following are additional points about the behavior:
 - All service items and line attributes (price list, item-level billing, item-level shipping, item-level flexfields, etc.) are copied as well.
 - When the original item is split, Oracle iStore creates the new line item with following quantity:
 - Model quantity: As input by the user
 - Components quantity: Model quantity times the unit quantity of the

component

- When the top-level model item is split, the new model items and their components are exact duplicates of the original top-level model item and its components.
 - The relationships between the original top-level model item and its components are preserved in the newly created model items and their respective components.
 - During the split, the sum of quantities of the split lines cannot exceed the original quantity.
3. After selecting the desired split quantities and entering the ship-to details, the customer proceeds through the checkout flow.

B2B End Customer Information Page

The Checkout: End Customer Information page only displays for B2B customers and only if Capture End Customer Data functionality is enabled. See the section, "Capture End Customer Data During Checkout", within this chapter, for more information on the feature.

Following are the main features and functionality of the End Customer Information (note that all information is initially defaulted from the shipping information):

- **Default From LOV:** Users can use the list-of-values to populate the end customer, contact, and address from the information stored for their company, or from the billing or shipping information page data.
- **End Customer Information:** The end customer company name displays next to this field, defaulted from the ship-to customer. Users can accept the organization defaulted or change or create a new organization. Possible values for this field are customers that are related to the sold-to organization through a "customer of" relationship, or any bill-to or ship-to account relationship.
- **End Customer Contact:** The end customer contact name displays, along with his telephone number and e-mail address, if available. The user can accept the default contact name or change or create a new one. The profile option, IBE: Mandate End Customer Contact, can be set to mandate an entry in this field; if this profile is Yes, the Clear button does not appear.
- **End Customer Address:** The default end customer address displays. The user can accept the default bill-to address or change or create a new one. The user also has the following checkbox options in this field: (1) *Use the same for shipping*, which defaults the same address into the shipping page; and (2) *Use the same for billing*, which defaults the same address into the billing page.

Note: If the B2B user does not have the IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, the Use the same for billing check box is not displayed.

- **Multiple End Customers:** This area (which features show/hide icon functionality) allows users (B2B and partners only) to enter a separate end customer for different items in the cart. Following are the fields in Update Item End Customer Information page available from this area: End Customer, End Customer Contact, and End Customer Address. In addition, multiple quantities of the same item can be split (except for child items in a configuration).
- **Cart Actions:** From the end customer information page, the following cart actions are available: Save Cart, Share Cart (if implemented), and Request Help (if Sales Assistance functionality is implemented).

B2B Customer Selection and Entry Pages

From the B2B Checkout: Shipping Information, Checkout: Billing and Payment Information, and Checkout: End Customer Information pages customers can select new customer information and enter new customer data to be related to the order at cart or item level. Selecting and creating customer information in these pages is dependent upon whether or not the B2B customer has certain permissions in his user role. These permissions are listed in the section, "Selection and Creation of Organization Data During Checkout", within this chapter.

The company information defaulted from the lists of values on the shipping, billing, and end customer pages maps to the sold-to organization associated to the logged in user. The *My company information* defaulting option is available only when the user has appropriate "change customer" and "change contact" permissions (e.g., IBE_CHANGE_SHIPTO_CUSTOMER and IBE_CHANGE_SHIPTO_CONTACT in the Shipping page). When selecting this option, the sold-to contact is defaulted based on the logged in user. The address is defaulted based on the defaulting rules (first using the primary ship-to address for the contact, then using the primary ship-to address of the organization). For more information about the defaulting rules in the checkout phase, see the section, "Shopping Cart Defaulting During Checkout", within this chapter.

Select Customer Page

The Search and Select: Ship To Customer, Bill To Customer, and End Customer pages are available from the checkout information pages to users who have the appropriate "change customer" permissions (e.g., IBE_CHANGE_BILLTO_CUSTOMER, IBE_CHANGE_SHIPTO_CUSTOMER) in the role assigned to them. Users who have these permissions can select the Change button to choose a new ship-to, bill-to or end customer in the selection pages. The selection pages have the following features and functionality:

- **Search Utility:** The following search options are available.
 - Search For LOV: From this LOV, customers can filter the search by Organization or Person.
 - Account Number Textbox: Customers can enter an account number in the textbox to further filter the search to an individual account number.
- **Customer Information Table:** The table displays customer name (either person or organization; customers are related to the sold-to with a "customer of" relationship or a "ship-to" or "bill-to account" relationship) and the account number(s) associated with that person or organization.
- **Create Customer Button:** If assigned the correct permission, customers can create new customers by selecting this button and entering the required information. See the "Create Customer Page" section below.

Select Contact Page

The Search and Select: Ship To Contact, Bill To Contact, and End Customer Contact pages are available from the checkout information pages to users who have the appropriate "change contact" permissions (e.g., IBE_CHANGE_BILLTO_CONTACT, IBE_CHANGE_SHIPTO_CONTACT) in the role assigned to them. Users who have these permissions can select the Change button to choose a new ship-to, bill-to or end customer contact in the selection page. The selection pages have the following features and functionality:

- **Contact Name Textbox:** Customers can enter a customer contact name or partial name in the textbox to filter the search for an individual.
- **Contact Information Table:** The table displays contact name the primary phone number associated with the contact, and the primary e-mail address associated with the contact.
- **Create Contact Button:** If assigned the correct permission, customers can create new contacts by selecting this button and entering the required information. See the "Create Contact Page" section below.

Select Address Page

The Search and Select: Ship To Address, Bill To Address, and End Customer Address pages are available from the checkout information pages to all B2B users. Users can select the Change button to choose a new ship-to, bill-to or end customer address in the selection pages. The selection pages have the following features and functionality:

- **Search Utility:** An auto-search is performed when a user comes to this page for the first time.

Country defaulting is done as follows: If a default territory is set for the operating

unit associated with the logged in user, that country will be defaulted. Otherwise, the first country in the list will be defaulted. Following are the search options:

- **Country LOV:** Customers can filter the search by country. The Country LOV is populated as follows: If there are some ship-to countries set up for the HR organization, then only those will be listed in the Shipping and End Customer address selection pages. Otherwise, all the countries in the FND_TERRITORIES table will be listed. Similarly in the Billing address selection page, if some bill-to countries are setup for the HR organization, those will be listed. Otherwise, all the countries in the FND_TERRITORIES table will be listed.
- **View by LOV:** Customers can filter the search by: (1) Customer addresses; (2) Customer contact's addresses (only displays if a contact has been selected); or (3) All contact's addresses (only displays if the user has IBE_CHANGE_SHIPTO_CONTACT permission in the ship-to or end-to context or IBE_CHANGE_BILLTO_CONTACT permission in bill-to context).
- **Address Information Table:** The table displays complete address, the address type (usage), and whether it is the primary address stored for the customer or contact.
- **Create Address Button:** If assigned the correct permission, customers can create new addresses by selecting this button and entering the required information. See the "Create Address Page" section, below.

In addition to the country filter, customers can search by one or more of the following fields:

- Site Name
- Site Number
- Address Lines
- City
- State
- Postal Code
- County
- Province

Customers can specify any combination of these fields for performing a search query against the available customer addresses. The search results display a filtered list of addresses.

Create Customer Page

The Create <Ship To/Bill To/End> Customer pages are available from the Search and Select: Customer pages to users who have the appropriate "create customer" permissions (e.g., IBE_CREATE_BILLTO_CUSTOMER, IBE_CREATE_SHIPTO_CUSTOMER) in the role assigned to them. Users who have these permissions can select the Create button in the applicable Search and Select pages and create a new ship-to, bill-to or end customer. The create customer pages have the following features and functionality:

- **Type of Customer LOV:** Customers can choose to create an organization or a person type of customer; the data entry fields are different for the two types of customers:
 - **Organization Customer:** The data entry fields are organized into three main areas: Customer information (company name, phone and fax number), Contact Information (name, e-mail address, and contact numbers), and Address information (address, city, state, zip, country).
 - **Person Customer:** The data entry fields are organized into two main areas: Customer information (person name, e-mail address, and contact numbers) and Address information (standard address fields).

Create Contact Page

The Create <Ship To/Bill To/End Customer> Contact pages are available from the Search and Select pages to users who have the appropriate "create contact" permissions (e.g., IBE_CREATE_BILLTO_CONTACT, IBE_CREATE_SHIPTO_CONTACT) in the role assigned to them. Users who have these permissions can select the Create Contact button in the Search and Select pages to create a new ship-to, bill-to or end customer contact. The create contact pages are organized into two main areas: Contact Information (with company name defaulted and entry fields for contact name, e-mail address, and contact numbers) and Contact Address. The display of the Contact Address section is controlled by the appropriate "create contact" permission (e.g., IBE_CREATE_SHIPTO_CONTACT_ADDRESS). When displayed, the address creation is optional.

Create Address Page

The Create <Ship To/Bill To/End Customer> Address pages are available from the Search and Select Address pages to users who have the appropriate "create address" permissions (e.g., IBE_CREATE_BILLTO_CUSTOMER_ADDRESS, IBE_CREATE_BILLTO_CONTACT_ADDRESS, IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS, IBE_CREATE_SHIPTO_CONTACT_ADDRESS) in the role assigned to them. Users who have these permissions can select the Create Address button in the Search and Select pages to create a new ship-to, bill-to or end customer address. Customers have the option of creating an address associated with the company or associated with the

contact (this is controlled by the permissions mentioned in "Create Contact Page", above; for example, if the user only has the IBE_CREATE_BILLTO_CUSTOMER_ADDRESS permission, then he can create the address for the customer). In the create page, the company and contact are defaulted into the page, and the data entry fields are standard address fields.

Terms and Conditions Page

For both B2B and B2C users, Terms and Conditions are displayed in the Checkout: Review Terms and Conditions page, if this functionality has been implemented (see the chapter, Integrating Oracle iStore with Oracle Sales Contracts, page 30-1). Users must agree to the Terms and Conditions on the order before finalizing checkout if the profile option, IBE: Enforce Terms and Conditions Review by User, is Yes. The buttons on this page are:

- **I Agree:** This button move the customer to the next stage in the checkout flow, the Checkout: Review and Place Order page.
- **I Disagree:** This button engages the sales assistance page flow and only displays if Sales Assistance functionality has been implemented (see the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1).
- **Cancel:** This button takes the customer back the Shopping Cart page with no order committed.
- **Back:** This button takes the customer back to the previous step in the checkout flow.

Terms and Conditions are displayed in the Checkout: Review Terms and Conditions page, and can be shown dynamically based on items in the cart, if required. This functionality requires additional setups detailed in the chapter, Integrating Oracle iStore with Oracle Sales Contracts.

Order Review Page

The Checkout: Review and Place Order page is the final page in the checkout/order placement flow (besides the order confirmation page). It displays the following information:

- Customer information at cart and item levels (customer contact name and company)
- Shipping and billing address
- Shipment method, priority requested delivery date, shipping instructions, and packing instructions
- Billing payment type, payment term, and P.O. number, if applicable

- Additional Information section (descriptive flexfields, if enabled) at cart and item levels (only if IBE: Use Additional Information is Yes, the required descriptive flexfield setups are done, and information is populated); customers can select the Change button to change the information from this page.
- Information about items purchased, such as name, quantity, etc.

The order review page allows users to change shipping, billing, and customer data, if the user has the required permissions. If Terms and Conditions (T&Cs) are enforced (IBE: Enforce Terms and Conditions Review by User is Yes) and something about the order has changed that requires a re-review of T&Cs (e.g., quantity, bill-to data, or ship-to data changes), a link to the T&Cs is displayed, allowing user to review them again. In this case the Place Order button is grayed out; only after the user accepts T&Cs will the Place Order button display.

Orders Business Flow

The orders flow is as follows

1. An order is placed in an Oracle iStore site when the user selects the Place Order button.

Note that B2B users must have the IBE_CREATE_ORDER permission in their user roles to see the Place Order button.
2. If the order uses standard checkout, Oracle Order Capture APIs send order data to Oracle Order Management. (The Submit_Quote API passes carts to the Create_Order API, which books the order in OM.) The default order state (Booked or Entered) is determined by the profile option, ASO: Default Order State.
 - **Booked** orders are ready to move to the next stage in the order process (for example, shipping). Booked orders cannot be deleted or modified (although quantity can be changed) by a sales representative. In addition, a sales representative cannot do a line-level return for a Booked order.
 - **Entered** orders must then move to the Booked stage before completion.
3. If the order is placed using Express Checkout, the iStore Express Checkout Order Submission concurrent program loads the order data into the Oracle Order Management tables.
4. The order is then processed through Oracle Order Management, Oracle Shipping, and Oracle Receivables.
5. Users can view the order details --- including shipping, invoice, and payment information --- using the Order Tracker functionality in the Web sites.

For more information, see the following resources:

- *Oracle Order Management Implementation Manual* for additional information on how orders are processed in Order Management
- Oracle Integration Repository for information on APIs that send and retrieve orders information
- Oracle Financials documentation for more information on Oracle Receivables

Capture End Customer Data During Checkout

The ability to capture end customer data during checkout is described in the sections that follow.

Overview of Capture End Customer Data Feature

Some vendor organizations require their partners to provide end customer information when placing an order. To address this need, Oracle iStore allows implementers to enable the capturing of end customer data during checkout in the Customer Application.

Vendors are interested in capturing the end customer data for different reasons, such as:

- Post-sales assistance can be more accurate
- Marketing can have a better understanding of the target market
- Channel stuffing can be controlled. Sometimes, in order to meet their sales quotas, sales representatives negotiate favorable terms and conditions with a partner, if the partner agrees to register an order before the related deal is closed. By mandating the entry of the end customer information, this situation can be avoided.
- Validation of special pricing requests: Dealers may be required to provide end customer information when they are requesting special pricing for a specific customer.

Oracle iStore implementers can enable partners and B2B users to capture end customer information at the cart and item levels during checkout. End customer information consists of:

- Name
- Address
- Contact information, including e-mail address and phone number

Capture End Customer Data Key Features

The Capture End Customer Data functionality has the following main features for users

in the Customer Application:

- Ability to select flags to default in end customer data based on it being the same as the ship-to, bill-to, or sold-to.
- Ability to select different end customers per item in the cart.
- Ability to create new end customers on the fly (if assigned the appropriate user permission).

The Checkout: End Customer Information page is described in the section, "Checkout Flow Pages" within this chapter.

The ability to capture end customer data functionality has the following main features for implementers of Oracle iStore:

- Implementers can set Oracle Install Base defaulting rules using the Oracle Order Management defaulting rules engine; in particular, users may write their own defaulting conditions to populate the Order Management-dependent attributes that are passed to Install Base.

Note: Install Base attributes do not display in the iStore Customer Application.

- Implementers can use profile options to configure whether the Capture End Customer Data feature is present, and whether end customer data is required.
- Oracle iStore supplies several B2B user permissions that can be added to/removed from user roles to control creating and updating specific end customer information.

Capture End Customer Data High-Level Process Flow

Following is the high-level process flow for Capture End Customer Data functionality:

1. A B2B or partner user accesses an Oracle iStore site to place an order for an end customer. The vendor requires the end customer information to validate that the user is actually buying products for an end user.
2. The user creates a shopping cart with multiple items, which may be shipped to one or multiple end customers. Initially, end customer information is defaulted from the cart-level information stored for the B2B or partner user creating the shopping cart.
3. If purchasing for one end customer, the user proceeds to checkout and selects or creates end customer data (company name, location, and contact name) in the Checkout: End Customer Information page. If purchasing for multiple end customers, the user proceeds to checkout with the cart, and for each item of the shopping cart, the user selects or creates the end customer data.
4. In either case, partners and B2B users can use UI flags to specify whether:

- End customer information is the same as the ship-to, bill-to, or sold-to customer information at the cart level
- End customer information is the same as the sold-to customer/cart information at item level

To create new end customers, the user must have the proper permissions in his B2B user role, as discussed in the "Rules and Guidelines for Capture End Customer Data Feature" section, below.

Searching for and Selecting End Customer Data

From the Checkout: End Customer Information page, partner and B2B users can select end customer information from the available lists of values (LOVs) in the Search and Select: End Customer Information page. The LOVs display:

- **Customer:** The names of end customers related to the partner or B2B user display. The end customers listed in the LOV are related to the partner or B2B organization through a "customer of" relationship, or any bill-to/ship-to relationships between accounts.
- **Contacts:** Contact information for the customer displays, including contact name, e-mail address and phone numbers.
- **Addresses:** Addresses associated to the company and the contacts displays.

In the LOVs, Oracle iStore provides the ability to search for customers by multiple parameters. All data is sourced through Oracle iStore's relationship with Oracle Trading Community Architecture (TCA) customer model.

Rules and Guidelines for Capture End Customer Data Feature

The following rules and guidelines apply to the feature:

- When creating a cart, end customer information is defaulted from the value set at the header level. Partner and B2B users can change the end customer information for each line of the order.
- End customer information can be defined only for products and parent models, but not for services or components of a model.
- Users can create end customer data in the Customer Application only if assigned the appropriate permissions. The permissions related to this functionality are:
 - `IBE_CREATE_END_CUSTOMER`
 - `IBE_CREATE_END_CUSTOMER_CONTACT`

- IBE_CREATE_END_CUSTOMER_CONTACT_ADDRESS
- IBE_CREATE_END_CUSTOMER_ADDRESS
- IBE_CHANGE_END_CUSTOMER_CONTACT
- IBE_CHANGE_END_CUSTOMER

Note: The Oracle iStore B2B user roles do not contain these permissions by default. Follow the steps in the chapter, Implementing User Management, page 14-1, to assign them.

- Since end customer addresses will be associated to the party site usage 'ship-to', end customer information will also appear in the shipping information page LOVs. Implementers who assign the address creation permissions to users should also assign the related permissions for ship-to addresses. These permissions are:
 - IBE_CREATE_SHIPTO_CUSTOMER
 - IBE_CREATE_SHIPTO_CONTACT
 - IBE_CREATE_SHIPTO_CONTACT_ADDRESS
 - IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS
 - IBE_CHANGE_SHIPTO_CONTACT
 - IBE_CHANGE_SHIPTO_CUSTOMER
- When users search for a customer in the End Customer LOV, all addresses related to the end customer through sold-to, bill-to or ship-to relationships in Oracle TCA are displayed and can be selected by the user. These relationships between sold-to and end customer are defined based on past transactions that link the two entities, or they can be created manually by the implementer. The implementer can set up this relationship manually through Oracle Sales or Oracle Customers Online.
- End customer data is displayed in the Checkout: Review and Place Order and Order Tracker screens.
- In Oracle Order Management and Oracle Quoting, sales representative can select any customer available in Oracle TCA. In this case, no relationship is defined between sold-to and end customer. If the sales representative in Oracle Quoting selects an end customer not available in Oracle iStore, the user can still proceed with checkout and place an order for this quote, without any validation on the end customer value. If the user changes the end customer value, the customer selected by the sales representative will not be available in the Oracle iStore LOV.

Creation of End Customer Data

If assigned the appropriate permissions (shown in the above section), B2B and partner users can create the following end customer data:

- Customer Type of Organization:
 - Company Name
 - Phone Number
 - Fax Number
 - Address
 - Primary Contact

- Customer Type of Person:
 - Name (First, Middle, Last)
 - Email Address
 - Phone (Personal, Business) and Fax Numbers
 - Address

- Contact:
 - Name (First, Middle, Last)
 - Email Address
 - Phone (Personal, Business) and Fax Numbers
 - Address (optional)

- Address:
 - Specify if contact or company address
 - Address (lines 1-4)
 - City, State, Zip/Postal Code, Country

If the B2B or partner user is not associated to the appropriate permission, the user can place orders only using customers already existing in the system. In this case, if there is a need to create a new end customer, the process needs to be done using another method (for example, in Oracle Customers Online, Oracle Order Management, or

Oracle Quoting). In the LOV, when selecting end customers, the B2B or partner user can access only customers related to his organization. If a customer is associated to multiple organizations, the B2B or partner can only view contacts, accounts, and transactions related to the organization with which he is associated.

Implementing Capture End Customer Data Feature

Implementing the Capture End Customer Data feature involves ensuring that the B2B or partner users have the appropriate permissions in the B2B user roles and setting profile options. Following are the profile options:

- **IBE: Display End Customer Information:** Specifies whether the Checkout: End Customer Information page displays in the checkout flow. Set to Yes to enable the page.
- **IBE: Mandate End Customer:** Specifies if it is mandatory for the B2B or partner user to select end customer data in the checkout flow. Set to Yes to enable this mandate.
- **IBE: Mandate End Customer Contact:** Specifies if it is mandatory for the B2B or partner user to select an end customer contact name in the checkout flow. Set to Yes to enable this mandate.

If IBE: Mandate End Customer is set to Yes, then IBE: Mandate End Customer Contact can be set either Yes or No, based on implementation requirements. If IBE: Mandate End Customer is set to No, then IBE: Mandate End Customer Contact should not be set and will not take effect.

Order Tracking

Once an order is submitted in an Oracle iStore site, customers can log into the site and access their order details (including invoices, payments, shipping, and returns) in Order Tracker, if the administrator has enabled this functionality.

Order Tracker Overview

In the Customer Application, Order Tracker is available to registered users through the Orders icon. The Order Tracker section consists of the following subtabs:

- Track Orders
- Pending Orders
- Invoices
- Payments

- Returns
- My Products

Note that the specific functionality must be implemented for the relevant subtab to appear.

Searching in Order Tracker

In the Order Tracker screens, all customers can search for orders, invoices, payments, and return orders. For orders, both basic and advanced search are available. Advanced search, enabled through a profile option, is available to only B2B and partner users. In addition, the B2B/partner screens in simple search contain additional search parameters not available to B2C customers.

Note: Not all fields and data display to all users -- Be sure to review the topic, "Rules and Guidelines for Order Tracker Search", within this section.

Order Tracker Basic Search

Basic search includes the following search options:

- From *<Orders, Invoices, Payments, Returns> in last* menu, select 7 days or as appropriate
- In the *<Orders, Invoices, Payments, Returns> between* field, select the appropriate from and to dates
- In the *Search By* field, select appropriate values; different search by fields are available whether the user is searching for orders, invoices, payments, or returns.

The Order Details and Item Details pages display pricing agreement data, end customer information and any additional information defined at order header or line level.

Order Tracker Advanced Search

Using Advanced Search, B2B and partner users can search at order level or item level.

Order Level Advanced Search

When searching at the order level, users can query by:

- Order Number
- Order Status
- Order Date Period
- Reference Number

- Pricing Agreement
- Ship to Customer Name
- Bill to Customer Name
- End Customer Name
- P.O. Number

When a user selects Ship to Customer, Bill to Customer and End Customer, the corresponding Ship to Account, Bill to Account and End Customer Account are displayed as selected values, concatenated to the customer name.

The search results display:

- Order Number
- Reference Number
- Order Date
- Booked Date
- Order Status
- P.O. Number
- Shipping Details

Users must enter at least one search parameter other than the order status, order dates, and pricing agreement to perform the search. An error message displays when the search is performed without entering the search criteria.

Users can navigate from the orders summary table to the Order Details and to the Shipment Details pages. Ship to, Bill to, End Customer and Pricing Agreement are not available in the summary search results. Users can drill down into the order details to view this information.

Item-Level Advanced Search

When searching by items (order lines), users can query by:

- Part Number
- Order Number
- Pricing Agreement
- Ship to Customer Name

- Bill to Customer Name
- End Customer Name
- P.O. Number
- Requested Date Period
- Line Status (Only those line statuses enabled in iStore display.)

The search results display:

- Product Information (part number, item name)
- Quantity Information (ordered and shipped quantities)
- Unit of Measure
- Line Status (e.g., open, closed)
- Order Number
- Line Details Icon

Users must enter at least one search parameter other than line status, requested delivery dates, and pricing agreement to perform the search. An error message will be displayed when the search is performed without entering the search criteria.

Users can navigate from the lines summary table to the Order Details and Item Details pages. Ship to, Bill to, End Customer and Pricing Agreement will not be available a search result fields. Users can drill down into the order details to view this information.

Implementing Advanced Search

To implement advanced search, set the profile option, IBE: Use Advanced Search in Order Tracker, to Yes. See the appendix, Profile Options, page A-1, for more information on the profile.

Copy Prior Order

The Order Details page allows users to select one or more items on the order and copy them to the shopping cart. This allows users to re-order items and have them added directly to the shopping cart. Users must select at least one item when clicking on the existing "Add to Cart" button. An error message is displayed when the Add to Cart function is performed without selecting any of the order line items. When the Add to Cart function is performed, users will be navigated to the shopping with the selected items, UOM and ordered quantities populated in the cart.

Additional Information: Service items and Configured items are not supported in the "Copy Prior Order" feature.

Rules and Guidelines for Order Tracker Search

The following rules and guidelines apply to Order Tracker search (both simple and advanced):

- The values in the Basic Search mechanism are values derived from an Oracle Applications lookup. You can change these values, if desired. For details about the related lookup and default search values, see the chapter, *Implementing Messages and Prompts*, page 16-1. The default search for the search utility is derived from the first value specified in the Oracle Applications lookup. By default, this first value is 7. You can also customize the search by passing a parameter from the display template. See the section, "Customizing Order Tracker Search", below.
- Out of the box, users can query orders/lines that are sold to their account. Users also can query the orders billed to their account, depending upon the value of the profile option, IBE: View-by Customer Orders in Order Tracker, and if the permissions, IBE_VIEW_BILL_TO_ORDER and IBE_VIEW_ORDER, are assigned to them.
- The search results display only orders of Order and Mixed categories, or lines belonging to these order categories. In the case of the implementation not supporting returns, then the search results also will display orders in the Return category. If the implementation supports returns, Oracle iStore uses a specific page to display only returns. If the Returns feature is not implemented, all orders and returns are displayed in the track orders screen.
- Users can query model components in the order lines search. The order lines summary table displays the components as regular standard items. For example, if a particular order number is searched and it has a model with four children, the five lines of the model item are shown without any indentation or grouping. Users can drill down to the Order Details page and view the complete configuration at the order level.
- Users can query service items in the order lines search. The order lines summary table will display the services as regular items, and users can drill down to the Order Details page and view the associated serviceable items at the order level.
- The Pricing Agreement search field and information only display if users have IBE_USE_PRICE_AGREEMENT and IBE_VIEW_NET_PRICE permissions and/or pricing agreements at line level are enabled (IBE: Use Line Agreements is Yes). The list of values displays only pricing agreements associated to the sold-to customer (sold to organization of the logged in user).
- End customer information, including the End Customer search field, only displays if the profile option, IBE: Display End Customer Information, is Yes. This is independent of the permissions used in the checkout flow. See the "Capture End Customer Data During Checkout" topic in this chapter for more information.

- End Customer Name: The end customer LOV always displays. The LOV displays customer names with the same criteria as the checkout LOV. The LOV does not display the Create customer button.
- Ship to Customer Name: The ship-to customer LOV always displays. The LOV displays customer names with the same criteria of the checkout LOV, based on a permission (IBE_SHIPTO_ANY_ACCOUNT). The LOV does not display the Create customer button.
- Bill to Customer Name: The bill-to customer LOV always displays. The list of values displays customer names with the same criteria of the checkout LOV, based on a permission (IBE_BILLTO_ANY_ACCOUNT). The LOV does not display the Create customer button.
- For the Order Status field, only those order statuses enabled in Oracle iStore display in the LOV. Order statuses are defined in a lookup described in the chapter, Implementing Messages and Prompts, page 16-1.
- For the Line Status field, only those line statuses enabled in Oracle iStore display in the LOV. Line statuses are defined in a lookup described in the chapter, Implementing Messages and Prompts, page 16-1.
- The Part Number search field retrieves an LOV based on items defined in the Master Inventory Organization associated to the current operating unit.

Customizing Order Tracker Search

You can customize the default Number of Days value in Order Tracker Basic Search beyond the customization allowed by changing the lookup values. You do this by modifying JSP code to pass the desired default number in the display template parameter, `defaultNoOfDays`. The value for the `defaultNoOfDays` parameter is passed from the container page (e.g., `ibeCOtdOrdSumMain.jsp`) through the `PageContext` before including the processing page (e.g., `ibeCOtpOrdSum.jsp`). If passing the parameter in the display template, the default number of days is retrieved based on the following rules:

- If the value of `defaultNoOfDays` (N) exists in the lookup, `IBE_QUERY_ORDERS_RANGE_LOOKUP`, the default query retrieves all orders in the last N days.
- If the value of `defaultNoOfDays` (N) does not exist or is disabled in the lookup, the default query runs for the number of days that is the lowest value in the lookup.

If the value for the parameter, `defaultNoOfDays`, is not passed in the display template, following is the behavior:

- If the value of 7 is present in the lookup, the default query retrieves all orders in the last 7 days.

- If the value of 7 is not present or is disabled in the lookup, the default query runs for the number of days that is the lowest value in the lookup.

For details about the related lookup and default search values, see the chapter, *Implementing Messages and Prompts*, page 16-1.

Customizing the Code

To pass the parameter from the display template, in the container page, include the following line of code just below the include for the processing page:

```
//pageContext.setAttribute("defaultNoOfDays", "9", PageContext.
REQUEST_SCOPE); %>
```

For example, in `ibeCOtdOrdSumMain.jsp`, the code might appear as:

```
//Include
//pageContext.setAttribute("defaultNoOfDays", "9", PageContext.
REQUEST_SCOPE); %>
?
<%@include file="ibeCOtpOrdSum.jsp" %>
```

Similarly, the default query for Invoices, Payments and Returns can be customized by modifying the respective container JSP pages (`ibeCOtdInvSumMain.jsp`, `ibeCOtdPmtSumMain.jsp` and `ibeCOtdRetSumMain.jsp`),

Examples

In these examples, it is assumed that the values present in the lookup are: 3, 7, 14, 30, and 90.

- **Example 1:** Let the value passed from the container page be 14. In this example, the default query would be the results in the last 14 days.
- **Example 2:** Let the value passed from the container page be 10. In this example, the default query would be the results in the last 3 days.
- **Example 3:** The main page is not passing any value. Since 7 is present in the lookup, the default query would be for the last 7 days.
- **Example 4:** Disable/remove 7 from the lookup. In this example, the default query would be the results in the last 3 days.

Orders and Related Pages

The Orders page, accessible to customers by selecting the Orders icon and then the Orders subtab, summarizes a customer's submitted orders. Summarized order information includes:

- **Order Number:** This is a unique number generated by Oracle Order Management. In the user interface, the number is a hyperlink leading to the Order Details page (see "Order Details Page", below, for more information).

- **Reference Number:** This number corresponds to the order headers source document identification number. If the order is created from Oracle iStore, the reference number will contain quote header ID of the quote.
- **Order Date:** This is the date the customer placed the order.
- **Booked Date:** This is the date booked into Oracle Order Management.
- **Order Status:** This will be Entered, Booked, Cancelled, or Closed.
- **Shipment Details icon:** This icon is a hyperlink leading to the shipping details page and displays only if shippable items are in the order (see "Shipping Details Page", below, for more information). The icon is enabled only if the order header status is Booked or Closed. This does not validate for any shippable lines in the order.

Note: Customers will be able to see orders billed to their accounts or sold to (default) their accounts, depending upon the setting of the profile option, IBE: View-by Customer Orders in Order Tracker, and if the permissions, IBE_VIEW_BILL_TO_ORDER and IBE_VIEW_ORDER, are associated. For more information, see the section, "IBE_VIEW_BILL_TO_ORDER and IBE_VIEW_ORDER", in the appendix, Seeded User Data, page B-1, as well as the "IBE: View-By Customer Orders in Order Tracker" section in the appendix, Profile Options, page A-1.

The Orders page contains search mechanisms which are described in "Searching in Order Tracker", within this chapter.

This section contains descriptions of the Orders page and the sub-pages navigable from it. Unless otherwise specified, information about item types in this section relates to standard items (versus configured items, model bundles, and install base items). See the sections, "Configured Items in Order Tracker" and "Install Base Items in Order Tracker", within this chapter, for details about the display of these types of items in the Order Tracker pages.

The sections that follow describe these pages:

- Order Details Page
- Item Details Page
- Pricing Details Page
- Shipment Details Page
- Shipment Number Details Page

Order Details Page

The Order Details page displays a variety of information about a specific order. To access the Order Details page, customers select the hyperlink of an order number in the

Orders summary page. The Order Details page displays the follow sections and related information:

- **Return Items Button:** This button only displays if Returns functionality is implemented and if the order contains at least one item of the order set up as returnable in Inventory. This button leads to the Create Return: Select Items: page which lets customers begin the process of returning items in the order. See the "Order Returns" section within this chapter for more information.
- **Cancel Order Button:** This button only displays if Order Cancellation functionality is implemented. It leads to the Cancel Order page which lets customers begin the process of cancelling the order. See the "Order Cancellation" section within this chapter for more information.
- **Order Information Section:**
 - Order Number
 - Order Date
 - Reference Number
 - Booked Date
 - Order Status
 - Order Type
- **Customer Information Section:**
 - Customer Name
 - Customer Contact Name
 - Customer Contact Phone Number
 - Customer Contact E-Mail Address
 - Agreement Name: This only displays if a pricing agreement was used with the item; the B2B user also must have the IBE_VIEW_NET_PRICE permission. See the chapter, Implementing Pricing, page 11-1, for more information.
 - End Customer Information: This includes company name, contact name, and address.
- **Shipping Information Section:**
 - Ship-to Customer Information: This includes company name, contact name, and

address.

- **Shipping Method:** This is the method used to ship the item (e.g., DHL FedEx).
- **Shipment Priority:** This is the priority the customer entered while placing the order. Typically, values will be High, Medium, or Low.
- **Requested Delivery Date:** This is the date the customer requested delivery of the order.
- **Shipping Instructions:** This is the text the customer entered while placing the order.
- **Packing Instructions:** This is the text the customer entered while placing the order.
- **Freight Terms:** These are the terms for the transportation of the goods.
- **Shipments View Details:** This hyperlink leading to shipment details page (see "Shipment Details Page", below) displays only if the order header-level status is Booked or Closed. The link displays regardless of whether there are any shippable items on the order.

- **Billing and Payment Information Section:**
 - **Bill-to Customer:** This includes company name, contact name, and address.
 - **Payment Type:** This is the method of payment for the order.
 - **Payment Terms:** These are the payment terms for the order.
 - **Purchase Order Number:** This only displays if a purchase order was used on the order.

- **Additional Information Section:** This section will contain any cart-level descriptive flexfields set up. See the chapter, *Advanced Display*, page 36-1, for more information.

- **Ordered Items Information:**
 - Part Number
 - Item Name
 - Unit of Measure (UOM)
 - Quantity Ordered

- Quantity Shipped
- Item Prices: The prices of items are hyperlinks leading to pricing details page (it is only a hyperlink if the user has the permission, IBE_VIEW_NET_PRICE. The price displayed is the net price if the user has the above permission; otherwise, it is the list price, as in the shopping cart. See "Pricing Details Page", below, for more information.

Note: For configured items/models, the pricing hyperlink is shown at the parent model level. The part number, item name, ordered quantity and UOM shown are those related to the parent model. Users can select the configuration details to view the pricing details for each child of the model. If the price of the model or sub-model is null, then no price is displayed, and thus the Pricing Details page is not available. If the model is not a telecommunications service order (TSO) model, then the model is shown fully expanded, and children prices are not rolled up.
- Item Details Icon: This icon is a hyperlink leading to details page for the item. See "Item Details Page", below, for more information.
- **Total Amounts:** This is the display of subtotals, charges (taxes, shipping), recurring charges and pay now/pay later charges (if applicable), and the grand total of the order. The display of this section is affected by the presence of the IBE_VIEW_NET_PRICE permission in the user's role; see the appendix, Seeded User Data, page B-1, for more information. In addition, the display of this section will be affected by any TSO setups in your implementation. See the *Oracle Telecommunications Service Ordering Process Guide* for more information.

Note: In Order Tracker, taxes for each item do not display by default. To display taxes at the item level in the Order Tracker pages, modify the JSP associated to the Display Template, STORE_PSI_ORDER_DETAIL_P, to say `ibeDisplayLineTax=Y`.

Item Details Page

The Item Details page displays details about individual items in an order. Customers access this page by selecting the Item Details icon in applicable pages. The Item Details page includes the following sections and details:

- **Item Information Section:**
 - Part Number
 - Item Name
 - Order Number
 - Item Status

- Quantity Ordered
- Unit of Measure (UOM)
- **Customer Information Section:** This section contains the same information as the Customer Information section of the Order Details page, but the information is specific to the item being viewed.
- **Shipping Information Section:** This section contains the same information as the Shipping Information section of the Order Details page, except that there is no shipping details link. In addition, this section displays the Scheduled Delivery Date for the item. Scheduled Delivery Date is the date assigned on shipping confirmation by the merchant.
- **Billing and Payment Information Section:** This section contains the same information as the Billing and Payment Information section of the Order Details page, minus Payment Type, and showing, in addition, the following:
 - Invoice Number: This is a hyperlinked number leading to details of the invoice.
 - Commitment Name: This is present only if a commitment was used with the item ordered. See the chapter, *Implementing Pricing*, page 11-1, for more information.
- **Additional Information Section:** This section will contain any item-level descriptive flexfields set up. See the chapter, *Advanced Display*, page 36-1, for more information.
- **Tracking Details Section:**
 - Shipment Number: This is a hyperlink leading to the shipping details (see the "Shipping Details Page" section for more information). Note that other applications, such as Oracle Order Management, refer to the shipment number field as "delivery".
 - Tracking Number: This is the tracking number for the package. If more than one package was shipped, more than one tracking number will display.
 - Shipped: This is the quantity shipped in the package.
 - Shipping Method: This is the method used to ship the package.
 - Ship Date: This is the date the package shipped.

Pricing Details Page

The Pricing Details page is a pop-up page that displays pricing details for individual

items in an order. Customers access this page by selecting a hyperlinked item price in applicable pages (e.g., Order Details). The Pricing Details page includes the following sections and details:

- **Item Information Area:**

- Part Number
- Item Name
- Quantity
- Unit of Measure (UOM)

- **Pricing Information Area:**

- List Price Line: This is the price before adjustments.
- Discount Price Line(s): Multiple lines may display if more than one discount is being applied to the price.
- Total Adjustment Line: This is the total amount of adjustments applied.
- Net Price Line: This is the price after all adjustments are made.
- Unit column: For the applicable line, this column displays the appropriate unit price.
- Total Price column: For the applicable line, this column displays the unit price multiplied by the quantity being displayed.

Additional Guidelines for Pricing Information Section

- Values will be displayed in brackets if negative, and the corresponding percentage will be displayed in parentheses.
- For configured items, the Pricing Details page displays the rolled-up price of the model in the same format as for a regular item, as well as all the rolled-up values of all discounts and surcharges at children and parent level.
- The Pricing Details page for each child is displayed with the same format used for standard items. No roll up is performed at the parent model level for TSO items. If the price of the model or sub-model is null, then no price is displayed, and thus the Pricing Details page is not available.
- The Pricing Details hyperlink will not be enabled if: (1) The user does not have the IBE_VIEW_NET_PRICE permission; (2) The price of a model is null or zero; and (3) If the current page displaying the item information is a

pop-up page (e.g., a configuration details page shown in the create return flow), the prices will not be a hyperlink.

Shipment Details Page

The Shipment Details page displays details about the shipment of items in the order.

When an order line is booked, a Delivery Line is created for each of the lines in Oracle Shipping, followed by the running of the Pick Release program. Once Pick Release is completed successfully, the order lines in status, Awaiting Shipping, and release statuses, change to Picked/Staged. Later, the items are packaged and put into deliveries. Deliveries are assigned to trips, and finally ship confirm is performed. One order can have multiple deliveries and one delivery can have order lines from different orders. Note only shippable items data is shown. Note that the shipping details link/icon will be disabled if the order is in either Entered or Cancelled status.

The Shipment Details page Oracle iStore displays the following sections and details:

- **Order Information Section:**
 - Order Number
 - Reference Number
 - Order Status
 - Order Date
 - Booked Date
 - Order Total

- **Shipped Items Information Section:**
 - Part Number
 - Item Name
 - Unit of Measure (UOM)
 - Quantity Shipped
 - Shipment Number: This number is a hyperlink leading to the Shipment Number Details page (see below). Note that some other Oracle E-Business Suite applications, such as Oracle Order Management, refer to the shipment number field as "delivery".
 - Shipment Status: In Oracle Shipping, if the order line has been picked and

assigned to a delivery, then Oracle iStore displays statuses like Not Shipped, Awaiting Shipping, Shipped, etc. If the order line has not been assigned to a delivery, then Oracle iStore displays Not Shipped for these lines. Values in columns other than Part Number and Item will be blank when the shipment status is Not Shipped. Note that Oracle iStore displays order line status for shipping lines (from OE_ORDER_LINES table), not, delivery status, as Oracle Order Management does (from WSH_DELIVERY_DETAILS table).

- Shipment Method
- Tracking Number

Customizable Shipping Information Hook

To enable you to extend shipping details (for example, to link to an carrier's Web site), Oracle iStore provides a customizable user hook. See the section, "Order Tracker Hook for Shipping Lines", below, for details.

Shipment Number Details Page

The Shipment Number Details page, which is accessible by selecting a shipment number hyperlink in applicable pages (e.g., the Shipment Details page), displays information about the actual shipment of specific items in the order. Note that some other Oracle E-Business Suite applications, such as Oracle Order Management, refer to the shipment number field as "delivery". The Shipment Number Details page displays the following:

- **Shipment Information Section:**
 - Shipment Number
 - FOB: The FOB (free on board) is a lookup code defined in Oracle Receivables. It represents the point or location where the ownership title of goods is transferred from the seller to the buyer.
 - Shipping Method
 - Freight Terms: These are the terms for the transportation of the goods.
 - Ship Date
 - Waybill: This is the number of the waybill document prepared by the carrier of a shipment of goods; the waybill contains details of the shipment, route, and charges.
 - Shipment Status
 - Ship-to Customer: Displayed are contact name and address.

- Weight: This is the shipping weight of the shipment
- **Shipped Items Information Section:**
 - Part Number
 - Item Name
 - Unit of Measure (UOM)
 - Quantity Shipped
 - Shipment Status: In Oracle Shipping, if the order line has been picked and assigned to a delivery, then Oracle iStore displays statuses like Not Shipped, Awaiting Shipping, Shipped, etc. If the order line has not been assigned to a delivery, then Oracle iStore displays Not Shipped for these lines. Values in columns other than Part Number and Item will be blank when the shipment status is Not Shipped. Note that Oracle iStore displays order line status for shipping lines (from OE_ORDER_LINES table), not, delivery status, as Oracle Order Management does (from WSH_DELIVERY_DETAILS table).
 - Tracking Number: This is the carrier's tracking number for the shipment.
 - Order Number: This number is a hyperlink leading to the Order Details page.

Pending Express Checkout Page

If Express Checkout is enabled, users will see the details of their express checkout orders in the Pending Express Checkout Orders page accessible by selecting the Orders icon, then the Pending Orders subtab in the Customer Application. This page displays the following:

- **Link to Terms and Conditions:** If Terms and Conditions are enabled, the sentence, *By placing the order, you implicitly accepted the following terms and conditions.* displays in the page, with the terms and conditions phrase hyperlinked. The link leads to the Terms and Conditions on the order, where users can review, but not reject or accept, the terms.
- **Cancel Order Button:** This button lets users cancel the pending order.
- **Customer Information Section:**
 - Customer Name
 - Customer Contact Name
 - Customer Contact Phone Number

- Customer Contact E-Mail Address
- Agreement Name: This only displays if a pricing agreement was used with the item; the B2B user also must have the IBE_VIEW_NET_PRICE permission. See the chapter, *Implementing Pricing*, page 11-1, for more information on pricing agreements.
- End Customer Information: This includes company name, contact name, and address.
- **Shipping Information Section:**
 - Ship-to Customer Information: This includes company name, contact name, and address.
 - Shipping Method: This is the method used to ship the item (e.g., DHL FedEx).
 - Shipment Priority: This is the priority the customer entered while placing the order. Typically, values will be High, Medium, or Low.
 - Requested Delivery Date: This is the date the customer requested delivery of the order.
 - Shipping Instructions: This is the text the customer entered while placing the order.
 - Packing Instructions: This is the text the customer entered while placing the order.
- **Billing and Payment Information Section:**
 - Bill-to Customer: This includes company name, contact name, and address.
 - Payment Type: This is the method of payment for the order.
 - Payment Terms: These are the payment term for the order.
 - Purchase Order Number: This only displays if a purchase order was used on the order.
- **Additional Information Section:** This section will contain any cart level descriptive flexfields set up. See the chapter, *Advanced Display*, page 36-1, for more information.
- **Ordered Items Information Section:**
 - Part Number

- Item Name
- Unit of Measure (UOM)
- Quantity Ordered
- Quantity Shipped
- Item Prices: The prices of items are hyperlinks leading to pricing details page. See "Pricing Details Page", below, for more information. By default, only net price is displayed.

Note: For configured items/models, the pricing hyperlink is shown at the parent model level. The part number, item name, ordered quantity and UOM shown are those related to the parent model. If a model does not contain any recurring lines, prices are rolled up to the parent item. Users can select the configuration details to view the pricing details for each child of the model. If the price of the model or sub model is null, then no price is displayed, and thus the Pricing Details page is not available.

- Item Details Icon: This icon is a hyperlink leading to details page for the item. See "Item Details Page", below, for more information.
- **Total Amounts Section:** This is the display of subtotals, charges (taxes, shipping), recurring charges and pay now/pay later charges (if applicable), and the grand total of the order.
- **Other Express Checkout Orders Pending Submission Section:** This section displays other pending express checkout orders for the logged-in customer. Displayed in the table is the following information:
 - Reference Number
 - Last Updated: This is the date the pending order was last updated.
 - Total Amount: This is the total amount of the pending order.

See the "Express Checkout" section within this chapter for more information on Express Checkout functionality.

Invoices Page

The Invoices page is available by selecting the Orders icon, then the Invoices subtab within the Customer Application. Enabled by default, the display of the Invoices page can be disabled by setting the profile option, IBE: Enable Invoices in Order Tracker, to No. See the appendix, Profile Options, page A-1, for more information on the profile option settings. The Invoices page displays the following:

- **Search Utility:** The search utility includes the following fields:
 - Invoices in last LOV: This list-of-values contains the following predefined values in days: 7, 14, 30, 60, and 90. For example, a customer would select the value, 7, for this field if he wished to find invoices posted within the last seven days.
 - Invoices between: This field consists of two calendar icons, allowing the customer to choose dates between which to search.
 - Search by: This field contains two LOVs and a textbox, all of which work in conjunction with each other. The first LOV contains: Invoice Number, Invoice Date, Type (of invoice), and PO Number. The second LOV contains: is, contains, starts with, less than, is not, greater than, and ends with. For example, to find an invoice that starts with a certain value, a customer would select Invoice Number in the first LOV and contains in the second LOV, and then enter some value in the textbox.

- The Results table includes the following information:
 - Invoice Number: This number is a hyperlink to the Invoice Details page. See the "Invoice Details Page" section, below, for more information.
 - Invoice Date: This is the date the invoice was posted.
 - Type: Invoices will display Invoice in this field.
 - Original Amount: This is the original amount of the invoice.
 - Amount Due: This is the amount currently due on the invoice.
 - Due Date: This is the date payment is due.
 - PO Number: This is the purchase order number used with the order, if applicable.
 - Applied Amount: This is the amount previously applied to the invoice, if applicable.
 - Payment Details Icon: This icon is a hyperlink leading to the Payment Details page. See the "Payment Details Page" section, below, for more information.

Note: A B2B user must have the IBE_VIEW_NET_PRICE permission in his user role to see amounts in the Invoices pages.

Invoice Details Page

The Invoice Details page is available by selecting a hyperlinked Invoice Number in

applicable pages (e.g., from the Invoices page). The Invoice Details page displays details about a specific invoice and includes the following information:

- **Invoice Information Section:**

- Invoice Number
- Amount Due
- Invoice Date
- Due Date
- Original Amount
- PO Number

See the "Invoices Page" section, above, for more information about these fields.

- **Invoice Items Section:**

- **Line Number:** Each line is numbered (e.g., from 1 through 10). Note that an item and its tax amount are numbered with the same number. For example, the item, 17-inch monitor, and its taxable amount display on separate lines, but each line is numbered the same (e.g., with a 1).
- **Description:** This field displays the item name.
- **Quantity:** This is the quantity invoiced on the line.
- **Unit Price:** This is the price of an individual item.
- **Total:** This is the unit price multiplied by the quantity invoiced on the line.
- **Type:** Item lines display Line and tax lines display Tax.

Payments Page

The Payments page is available by selecting the Orders icon, then the Payments subtab within the Customer Application. Enabled by default, the display of the Payments page can be disabled by setting the profile option, IBE: Enable Payments in Order Tracker, to No. See the appendix, Profile Options, page A-1, for more information on the profile option settings. The Payments page displays the following:

- **Search Utility:** The search utility includes the following fields:
 - **Payments in last LOV:** This list-of-values contains the following predefined values in days: 7, 14, 30, 60, and 90. For example, a customer would select the value, 7, for this field if he wished to find payments posted within the last seven

days.

- **Payments between:** This field consists of two calendar icons, allowing the customer to choose dates between which to search.
- **Search by:** This field contains two LOVs and a textbox, all of which work in conjunction with each other. The first LOV contains: Payment Number, Customer Name, Receipt Date, (Payment) Type, and Payment Amount. The second LOV contains: is, contains, starts with, less than, is not, greater than, and ends with. For example, to find a payment that starts with a certain value, a customer would select Payment Number in the first LOV and contains in the second LOV, and then enter some value in the textbox.
- The Results table includes the following information:
 - **Payment Number:** This number is a hyperlink to the Payment Details page. See the "Payment Details Page" section, below, for more information.
 - **Receipt Date:** This is the date the payment was posted.
 - **Type:** This is the payment type (e.g., Cash, Check, Credit Card)
 - **Payment Amount:** This is the amount of the payment.
 - **Unapplied Amount:** Payments are applied against some invoice(s); the part of the amount which is not applied against any invoice is called the Unapplied Amount.
 - **Due Date:** This is the date payment was due.

Note: A B2B user must have the IBE_VIEW_NET_PRICE permission in his user role to see amounts in the Payments page.

Payment Details Page

The Payment Details page is available by selecting a hyperlinked Payment Number in applicable pages (e.g., from the Payments page). The Payment Details page displays details about a specific payment and includes the following information:

- **Payment Information Section:**
 - Payment Number
 - Applied Amount
 - Customer Name
 - Receipt Date

- Payment Amount
- Due Date
- Payment Type
- Unapplied Amount

See the "Payments Page" section, above, for more information about these fields.

- **Payment Items Section:**
 - Payment Number
 - Type
 - Original Amount
 - Amount Due
 - Amount Applied
 - Date Applied
 - Status
 - Applied against Invoice

Install Base Items in Order Tracker

Install base items are items previously purchased by customers and instantiated into the install base database. The My Products subtab within the Orders menu of the Customer Application displays install base items. The My Products subtab appearance is controlled through the profile option, IBE: Use Install Base View.

Important: Allowing customers to order and track telecommunications service orders (TSO) products requires the implementation of Oracle TSO functionality. See the *Oracle Telecommunications Service Ordering Process Guide* for more information.

Searching in My Products Tab

For B2C customers, the search criteria can be turned on or off by setting the profile option, IBE: Autoquery Install Base for B2C User. For B2B customers, the search criteria always is present, and the user must enter some values to retrieve an item. If the search criteria is turned on for B2C customers, the behavior is the same as for B2B customers.

The search criteria includes the following parameters:

- **Order Number:** This is the unique sales order number generated in Oracle Order Management.
- **Serial Number:** This is the serial number of the instance.
- **Part Number:** This LOV retrieves a window where users can search by part number (inventory item number) and item name.
- **Item Key:** This is the instance description of the instance in the install base. For TSO products, instance description will denote the phone number/port number.

For B2B customers: Blind queries are not supported for any search field. For Item Name, the customer must enter at least four characters (then he can use the percent (%) sign as a wildcard). For all other criteria, the customer must enter at least one character (plus the wildcard).

The search results return a table with the following columns:

- **Part Number:** This is the Inventory item number.
- **Item Name:** This is field is the item short description.
- **UOM:** This is the unit of measure in Inventory.
- **Quantity:** This is the quantity ordered. For a network container, this will always be 1.
- **Order Number:** The order number is a hyperlink taking the user to the Order Details page. The order number displayed is that last order that the instance was a part of. The order number is always displayed in this screen, and is *not* dependent on whether the customer has permission to see that order number (based on the profile, IBE: View-By Customer Orders in Order Tracker).
- **Serial Number:** This is the serial number of the instance.
- **Item Details icon:** This is an icon leading to the Item Details page, a new window with information specific to the instance selected (see the "Rules and Guidelines for My Products and Related Pages" section, below, for more information).
- **Reconfigure/Details and Details links:** These are hyperlinks underneath items which lead to the Configuration Details page, showing the exploded model along with the connected-to instances (see the "Rules and Guidelines for My Products and Related Pages" section, below, for more information).

In the search results, two types of configurations are represented:

- **Standard Configurations:** For standard configurations, the details display the

parent and the child of the instance.

- **TSO Configurations:** For a TSO configuration, when the user clicks on the Details link, both the parent and children of a configuration (e.g., Product A) are displayed as well. However, along with Product A, any trackable root node connected to Product A, or whose child is connected to Product A, also is displayed. The trackable root node children are not exploded, but a Details link allows the customer to see the children. The Reconfigure link will appear only if all of the following conditions are satisfied:
 - The parent is a network container
 - The network container is Web Published
 - The network container is Web Orderable
 - The network container is published in the site the user is currently in

For connected-to instances, only instances that belong to the logged-in user's owner_party_ID and the account_ID (of the individual) are retrieved.

Note that for B2B customers, the search retrieves instance(s) that are at any level of the configuration. For B2C customers, only the top-level instances are retrieved.

See also: *Oracle Telecommunication Service Ordering Process Guide* and the appendix, *Profile Options*, page A-1, within this guide.

Rules and Guidelines for My Products and Related Pages

The following rules and guidelines apply to the My Products page and related pages:

- As with other Order Tracker pages, customers must log in to view their install base orders.
- The profile option, IBE: Autoquery Install Base for B2C Users, specifies whether an autoquery is performed when a B2C customer accesses the My Products subtab in Order Tracker. See the appendix, *Profile Options*, page A-1, for more information on the profile option.
- The profile option, IBE: View Only Web Published Items in Install Base, specifies whether only Web Published items are visible in the My Products subtab in Order Tracker. See the appendix, *Profile Options*, page A-1, for more information on the profile option.
- Search results (whether retrieved through auto-query or not) reflect only those items ordered (where the customer is the owner party account) using the account under which the customer is currently logged in. If the Account Switcher Bin is enabled and the customer has more than one account, he can switch accounts and perform additional searches/auto-queries on these additional accounts.

- If end-customer information is provided on an order, then for these Install Base instances created, the owner party account can be different than the sold-to on the order. If a partner has placed an order for an end customer, he will not be able to see the products, since he will not be the owner of these instances (the owner will be the end customer). When the end customer reviews the install base, he can see the order numbers that were placed by the partner. However, when the end customer clicks on the order number, he will receive an error message saying that this order is not accessible to him.
- The order number is always shown, except in the case where a customer can see an instance, but cannot see the order associated with it due to lack of a user permission (i.e., IBE_VIEW_BILL_TO_ORDER and IBE_VIEW_ORDER). In the install base view, the profile option, IBE: View-By Customer Orders in Order Tracker, is *not* checked. See the appendix, Profile Options, page A-1, for more information on the profile option.
- Instances retrieved for a given account are retrieved regardless of the operating unit they belong to.
- Display of children of a kit item: For B2C uses, these are displayed in the configuration details screen. For B2B users, these are searchable and displayed in the configuration details screen.
- In Order Tracker, when kits are initially ordered they will be exploded (i.e., all components are displayed). On a disconnect order, kits also are exploded. The reason is the following: Explosion of the kit takes place based upon the BOM of the kit when the disconnect line is being created, as opposed to when the original order was created. This means there could be new, included item order lines, which were not in the original order.
- The number of records for the search results is driven by the profile option, IBE: Search Lines Per Page.
- The Item Details icon available in the search results table leads to the line details for the customer's install base items. The line details page displays differently depending upon whether the user is a B2C or B2B user:
 - For B2C users, the following information is displayed about an item: Part Number, Item Name (item short description in Inventory), current location, and service location ("Install at" from Install Base).
 - For B2B users, the following information is displayed about an item: Part Number, Item Name (item short description in Inventory), current location, service location ("Install at" from Oracle Install Base), Customer (party name), and Account (account number).

For "current location" and "service location", only the address is displayed (the

party name is not stored in the Install Base schema). The party is not displayed, unless the instance is with the manufacturer, in which case it will say With Manufacturer. If the instance is with the manufacturer, the address does not display.

- The Details link available in the search results table leads to the Configuration Details page, where the user can view details of the configuration.
- The Details/Reconfigure link available in the search results table leads to the Configuration Details page, where the user can select Reconfigure to launch Oracle Configurator and reconfigure the item.
- Custom Install Base attributes are not supported in the My Products summary tables and/or configuration details page. However, in the Item Details page, implementers may include a custom JSP page where they can expose any attribute. An empty Display Template is available in the window for this purpose. In the template, the instance ID is passed as a parameter. By using this parameter, custom code can display any Install Base/Order Management data.

Configured Items in Order Tracker

The Order Tracker display of configured items is described in the following sections. (Note that the term *configured item* is used for any item that has a parent item and subcomponents.)

The following descriptions apply to the display of these items in the Track Orders, Order Details, Shipment Details, and Item Details pages, unless specified otherwise.

General Display of All Configured Items

In the Order Details and Shipment Details pages, parent items are shown without any indentation, while the child items display under the parent, indented slightly. The sections that follow describe additional configured item display characteristics.

Order Details Page

In the Order Details page, non-TSO models show only the top-most parent (root) item, with a Details hyperlink leading to the Configuration Details screen, where in the entire model is exploded. The children items are indented based on their height in the model tree. The price shown is the rolled-up price of the entire model.

Item Details Page

Since the page shows single items, there is no concept of configurations in the Item Details page.

Shipment Details Page

In the Shipment Details page, parent items are shown without any indentation, while the child items display under the parent, indented slightly.

Returns Pages

In the pages that show single order return creation/return review, and in the submit/return confirmation pages, only the parent items are shown, with a Details hyperlink (as in the Order Details page for non-TSO models). Unlike the Order Details page, however, the configuration details display in a new (pop-up) window. In the Return Details page, configured items display similarly to the non-TSO items in the Order Details page.

Assemble-to-Order Items

Oracle iStore shows assemble-to-order (ATO) model items and all components. Following are additional details:

- After assembly, a new "config" line is created for the ATO. In the Order Details page, this config line displays below the ATO model line, if the config line is created. If the config line is not created in assembly, then only the ATO model is shown.
- **Shipping Information:**
 - An ATO model and all its components will have identical requested shipping information, as specified by the customer. The model and its components cannot be shipped individually. Internally, they must be assembled and shipped as a single assembly (config line).
 - In Oracle iStore, requested shipping information is displayed for the ATO model item.
 - Actual shipping information will be available only against the new config line assembly created. Further, the actual shipping information table will be displayed, if the shipment record exists for the config line.
- **Billing Information:**
 - Requested billing information can be viewed for the ATO model and all its components.
 - The Item Details page does not show billing details for config line items, since the config line is a line generated during assembly.
- Any service item associated with the ATO model and its components will be shown under the serviceable item.

Pick-to-Order and Kit Items

Oracle iStore shows pick-to-order (PTO) model items or kit items with all components. Following are additional details:

- Each PTO/kit line item can have different billing information.
- If a PTO item or a component is shippable, then requested and actual shipping information displays for each of the lines.
- Oracle iStore shows kit items along with included items in the Order Detail page. Included items will be indented, and will show prices as zero, while the top kit item will have the item price.
- In the Item Details page, a kit item and its included items will show the customer entered billing and shipping data. Since a kit item is always shippable, the shipping record exists, and Oracle iStore shows the actual shipping data, just as it does for standard items.
- In the Shipment Details page, Oracle iStore shows the kit item, included items, quantity shipped, shipment number, shipment status, ship method, and tracking number, just as it displays for components of configured items. Since a kit item is always shippable, then the above-mentioned columns will also be displayed for the top kit item. If any of the included items are non-shippable, those items are not displayed on this page. However, the kit item will always be shown (same logic as PTO model item).
- Included items are not displayed in the Invoices and Payments pages; only kit items are displayed.
- Any service item associated with the model or its components is shown under the serviceable item.

Model Bundles

Oracle iStore displays model bundles similarly to PTO and kit items. Following are additional details:

- All option classes in the bundle will be displayed.
- Any service item associated with the model bundle or its components will be shown under the serviceable item.

Telecommunications Service Ordering (TSO) Items

For telecommunications service ordering (TSO) items, the shipped quantity field is populated only for shippable child items in a network container. For non-shippable items, the field is blank. In the Order Details page, TSO models show the entire model

exploded. The children are indented like the non-TSO models.

Option Classes

Option classes are displayed in Order Tracker if the profile option, IBE: Display Option Classes in the Shopping Cart and Order Tracker, is set to Yes or is null (default value). See the appendix, Profile Options, page A-1, for more information on the profile option.

Order Tracker for B2C Users

Oracle iStore provides a limited subset of Order Tracker functionality for B2C users. The following bullet points highlight the differences from the B2B Order Tracker pages.

- **Simple Search:** Only simple search is enabled, with parameters the same as in a non-restricted UI. See the "Searching in Order Tracker" section, above, for more information.
- **Search Results:** Search results only display Order Number, Order Date, Order Status and Shipping Details. The user can drill down in the Order Details page by selecting an Order Number hyperlink, and can view shipping details page selecting the Shipping Details icon.
- **Order Details:** The Order Details page omits the following information available in the non-restricted UI:
 - Order Type
 - Reference Number
 - Order Date (date booked)
 - End Customer Information
 - Agreements
 - Contract Number
 - PO Number
 - Payment Terms
 - Freight Terms
 - Commitments

Also note: If the Additional Information descriptive flexfield is enabled, it will be displayed as in the B2B UI. The Shipment Details link will be displayed only if the

order is in booked or closed status as in the summary screen.

- **Order Line Details:** The Order Line Details page omits the following information available in the B2B UI:
 - Customer (including end customer) information
 - Pricing Agreement
 - PO Number
 - Commitment Name
 - Payment Term
 - Freight Terms

B2C Option for View By Orders

By setting a profile option, implementers can specify for B2C customers whether they are viewing orders where they are the sold-to or bill-to account on the order. To use the functionality, set the profile option, IBE: View-by Customer Orders to Bill-to, Sold-to or All (this setting includes all orders for where the customer is either the bill-to or sold-to on the order). See the appendix, Profile Options, page A-1, for more information on the profile option settings.

Permission Checking in Order Tracker

You can control whether Oracle iStore checks user permissions in the Order Tracker pages by setting the profile option, IBE: Use Auth Permissions in Order Tracker. See the appendix, Profile Options, page A-1, for more information.

Setting Number of Invoice/Order Lines to Display

The number of rows to display in Order Tracker when users view their orders, invoice, payment, or returns data is controlled by setting the profile option, IBE: Number of Invoice/Order Lines Displayed. See the appendix, Profile Options, page A-1, for more information.

Order Tracker Hook for Shipping Lines

By implementing a region item in the Shipment Details page within Order Tracker, you can enable an extra column in the page which links to an additional processing page. Both pages are Oracle iStore Display Templates -- one is a detail template and one is a processing template. For an introduction to Display Templates, see the chapter, Implementing the Catalog, page 9-1.

In the processing template, you can insert custom logic to fulfill your organization's business requirements. For example, in the processing page you could provide additional shipment tracking mechanisms, such as a link to a carrier Web site where users could track the shipment of their purchases.

Following are the implementation steps:

- Step 1 - Enable Region Item in Shipment Details Page
- Step 2 - Customize Shipping Details Processing JSP

Step 1 - Enable Region Item in Shipment Details Page

The region item, IBE_SD_ADDITIONAL, is disabled by default. After the region is enabled, a column, labelled, "Details", is automatically shown with a icon on the Shipment Details page.

Following are the steps to enable the region item:

Steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Choose Application Developer Common Modules.
3. From the navigator, choose Define Regions.
4. From the Region ID field, query for IBE_SHP_DTL_R.
5. Go to Region Items.
6. Scroll through the list and locate IBE_SD_ADDITIONAL.
7. Check Node Display to enable the region item. (Uncheck to disable.)
8. Save the changes.
9. Bounce the middle tier server.

Step 2 - Customize Shipping Details Processing JSP

Next, customize the Shipping Details Custom Processing page with your own business logic.

Following are the details about this page and the main Shipping Details page:

Shipping Details Custom Processing Page:

The physical file for this page is an empty page, allowing you to provide your own content. The mapped JSP file and Display Template information for the Shipping Details Custom Processing page are:

- **JSP file** --- ibeCOtpShpDtlCustom.jsp
- **Programmatic Access Name** --- STORE_SHIP_DETAIL_CUSTOM_P

Shipping Details Page:

The mapped JSP file and Display Template information for the Shipping Details page are:

- **JSP file** --- ibeCOtdShpDtl.jsp
- **Programmatic Access Name** --- STORE_PSI_SHIPMENT_DETAIL_D

Programmatically, the Shipping Details page table is constructed in a loop iterating through all region items. Each column is essentially a region item. Inside this loop, the URL to the Shipping Details custom processing page template is constructed. You can pass additional information to the destination by appending parameters to the URL (detailsURL). For example, you could provide information such as tracking numbers and shipping carriers. Such information can simply be stored in a variable to be used later.

For example:

```
else if (itemName.equals("IBE_SD_ADDITIONAL"))
{
String tplName = "STORE_SHIP_DETAIL_CUSTOM_P";
// You can append parameters to detailsURL to pass additional
information // to the processing page.
String detailsURL =
DisplayManager.getTemplate(tplName).getFileName();
%>
<td class="tableDataCell" valign="top" align="left">
<a href="<%= detailsURL %>">

</a>
</td>
<%
}
```

For sample code, see the Shipping Details Custom Processing page physical file (ibeCOtpShpDtlCustom.jsp). The sample code shows how to retrieve the parameter and process it. At the end of the page, the code simply redirects to Order Tracker; however, you can customize it to redirect to any page you want.

Changing Order Tracker Column Attributes

The columns that display in Order Tracker are retrieved from Oracle Applications AK Region attributes. Oracle iStore supports changing the AK Region Item attributes (for

the attributes listed in the following table) for several regions.

Note that region items can have a number of properties associated to them, for example, attribute type, attribute name, sequence, display length, long label, etc. However, Oracle iStore uses only some of these properties (the ones shown in the following table). If a property that is not used by Oracle iStore is changed, there will be no impact to the Order Tracker pages. The following table lists the region item properties used by Oracle iStore. All other properties are not used.

AK Region Attributes Supported in Order Tracker

Property	Purpose
Sequence	Used to determine the sequence in which the HTML table columns corresponding to the region items are rendered. This can be changed by the merchant to display the Order Tracker columns in the desired order.
Node Display checkbox	<p>Used to find out if a region item is intended for display. If it is not, then the column that maps to the region item is not displayed. This can be used by the merchant to selectively turn off the display of columns. For example, on the order summary page, if the Customer Name column is not required to be shown, the merchant can turn off the node display flag for that region item in the region, IBE_ORD_SUM_R.</p> <p>The Node Display can be programmatically turned on or off as well. Thus, even if the Node Display flag is set in the AK Region, the attribute might not be displayed based on specific business functionality. For example, the attribute corresponding to Order Type in IBE_ORD_HDR_R is enabled to be displayable, but will be hidden from the B2C user programmatically.</p>
Queryable checkbox	Used to determine the columns that can be queried on. These columns are then shown in the search drop-down list. For example, on the order summary page, if the Customer Name needs to appear as a field on which the users can query, then this can be accomplished by making the corresponding region item in the region, IBE_ORD_SUM_R, to be queryable.

Property	Purpose
Display Length	Controls the display length for VARCHAR2 fields in the pages. If merchants customize their pages to reduce the Display Length, for example, for Item Description, from 240 to 80 characters, then Order Tracker would truncate the database value to 80 characters and display only 80 characters.
Long Label	Used to retrieve the column headings for the columns shown in the HTML table on each Order Tracker page. This can be changed by merchants who have a need to display their own headings.

The following table shows the changeable regions, along with the page where they appear and the JSP file that presents the page.

AK Regions Supported in Order Tracker

Region ID	Page	JSP
IBE_INV_DTL_R	Invoice detail page/Invoice to payment details page	ibeCOtpInvDtl.jsp/ibeCOtpInvPmtDtl.jsp
IBE_INV_HDR_R	Invoice detail page header section/Invoice to payment detail page header section	ibeCOtpInvDtl.jsp/ibeCOtpInvPmtDtl.jsp
IBE_INV_SUM_R	Invoice Summary	ibeCOtpInvSum.jsp
IBE_ORD_DTL_R	Order Details	ibeCOtpOrdDtl.jsp
IBE_ORD_HDR_R	Order detail page header section	ibeCOtpOrdDtl.jsp
IBE_ORD_LINE_DTL_R	Item details page	ibeCOtpOrdLineDtl.jsp
IBE_ORD_SRL_HDR_R	Serial number pop-up page	ibeCOtpOrdLineSerialPopup.jsp
IBE_ORD_SUM_R	Order Summary	ibeCOtpOrdSum.jsp

Region ID	Page	JSP
IBE_PMT_DTL_R	Payment detail page	ibeCOtpPmtDtl.jsp
IBE_PMT_HDR_R	Payment detail page	ibeCOtpPmtDtl.jsp
IBE_PMT_SUM_R	Payment Summary page	ibeCOtpPmtSum.jsp
IBE_REL_RET_DTL_R	Order Detail page Related Return section	ibeCOtpOrdDtl.jsp
IBE_RET_CONF_DTL_R	Return confirmation page Detail section	ibeCOtpRetConfirm.jsp
IBE_RET_CONF_HDR_R	Return confirmation page header section	ibeCOtpRetConfirm.jsp
IBE_RET_CRE_MULT_LINE_DTL_R	Return creation page: Multi order flow, display without serial number search	ibeCOtpRetCreMultiLine.jsp
IBE_RET_CRE_MULT_LINE_SRL_R	Return creation page: Multi order flow, page display with serial number search	ibeCOtpRetCreMultiLine.jsp
IBE_RET_CRE_SINGLE_LINE_DTL_R	Return creation page: Single order flow	ibeCOtpRetCreSingleLine.jsp
IBE_RET_DTL_R	Return detail page/Order Detail page Return item section in case of trade-in lines	ibeCOtpRetDtl.jsp/ibeCOtpOrdDtl.jsp
IBE_RET_HDR_R	Return detail page header section	ibeCOtpRetDtl.jsp
IBE_RET_PENDING_DTL_R	Pending return section in Create return page (single order flow/multi order flow)	ibeCOtpRetPending.jsp
IBE_RET_SUB_AND_REV_DTL_R	Return: Review and Submit page detail section	ibeCOtpRetReview.jsp

Region ID	Page	JSP
IBE_RET_SUB_AND_REV_HDR_R	Return: Review and Submit page header section	ibeCOtpRetReview.jsp
IBE_RET_SUM_R	Return summary page	ibeCOtpRetSum.jsp
IBE_SHP_DTL_R	Ship detail for order number page detail section	ibeCOtpShpDtl.jsp
IBE_SHP_HDR_R	Ship detail for order number page header section	ibeCOtpShpDtl.jsp
IBE_DLY_HDR_R	Ship detail for shipment number page header section	ibeCOtpDlvyDtl.jsp
IBE_DLY_DTL_R	Ship detail for shipment number page detail section	ibeCOtpDlvyDtl.jsp
IBE_OL_SHIP_TRACK_R	Item detail page tracking section	ibeCOtpOrdLineDtl.jsp

Steps to Modify Column Attributes

You may use the following quick-steps to modify column attributes in IBE_ORD_SUM_R region. For more information, see the *Oracle Self-Service Web Applications Implementation Manual* (Web Applications Dictionary chapter).

Steps

1. Log into Oracle Forms with Application Developer Common Modules responsibility and navigate to Define Regions, Find Regions window.
2. Find IBE_ORD_SUM_R region.
3. Edit the Region Items form for the region.
4. In the list of region items/attributes within IBE_ORD_SUM_R region, find the region item/attribute to be changed.
5. Edit the attributes shown in the table above as desired.
6. Save your changes.
7. Bounce the application server.

Order Cancellation

Oracle iStore allows B2B and B2C users to cancel orders that they have placed in the Customer Application, if the orders are in Booked or Entered status in Oracle Order Management. B2B customers also can cancel orders across organizations.

Order Cancellation Process Flow

The process flow for order cancellation is as follows:

1. A user accesses the Order Summary or Order Details pages, and initiates the order cancellation process by selecting the Cancel Order button.

Note: The Cancel Order button displays in the Customer UI only if the profile option, IBE: Enable Order Cancellation in Order Tracker, has been set to Yes, and the order is cancellable (in Entered or Booked status). In addition, B2B users who do not have the IBE_CANCEL_ORDER permission will be unable to access the button. B2B users with the IBE_CANCEL_ORGANIZATION_ORDER permission can cancel orders across operating units for their organization.

Users who have enabled Express Checkout will be able to cancel Express Checkout orders before they are submitted to Order Management.

2. Once a user initiates the cancellation request, the system checks to see if the order is cancellable. If it is, the user is taken to the Order Cancellation page.

If the order is not cancellable, the cancellation process is aborted and a message is presented to the user which informs him that the order is not cancellable online and to contact his sales representative.

3. In the Order Cancellation page, the user is prompted to select a Cancellation Reason from a drop-list.
4. Once the cancellation request is submitted and accepted, a confirmation message displays on the UI.
5. Oracle iStore sends the Cancel Order e-mail to the user confirming that the order has been cancelled.

Implementing Order Cancellation

The cancel order feature is enabled by setting a profile option and ensuring that your B2B users have the appropriate permissions in their user roles. See the following sections for more information:

- "Set Cancel Order Profile Option"

- "Verify B2B User Permissions"

Set Cancel Order Profile Option

To enable the cancel order feature, set the profile option, IBE: Enable Order Cancellation in Order Tracker, to Yes. See the appendix, Profile Options, page A-1, for additional details about this profile option.

Verify B2B User Permissions

Verify that the B2B users registering in your sites have the permission, IBE_CANCEL_ORDER, in their user roles. Without this, the Cancel Order button will not display.

Oracle iStore also allows B2B users to view and cancel orders for their current session operating unit and other operating units within their organization. To enable this ability, assign their role the permission, IBE_CANCEL_ORGANIZATION_ORDER.

Order Returns

Oracle iStore's Returns feature allows both B2B and B2C users to return items from orders placed.

Note: This section covers returns processes and implementation tasks related directly to Oracle iStore. For information on setting up integrating applications, refer to the appropriate product documentation.

Returns Overview

In today's e-commerce environment, accepting return items in Web stores is standard functionality. Providing returns functionality both reduces the cost of doing business for merchants, and provides an invaluable step toward a complete customer self-service orientation.

To address this business requirement, Oracle iStore provides Returns functionality in the Customer Application. Using the Orders menu in the Customer Application, customers can initiate returns for orders which are in Booked or Closed status in Oracle Order Management. If an approval process is being used, an administrator can use Oracle Order Management to evaluate the returns, and either approve or reject the returns. Merchants can set up returns with or without Oracle Workflow approval mechanisms in place.

The following is a high-level Returns flow:

1. To initiate a return (also known as a Return Material Authorization, or RMA), customers select applicable items, specifying the return quantities and return reasons.

2. After the customer submits the RMA, Oracle iStore automatically sends a confirmation e-mail notification to the customer.
3. Once Oracle Order Management processes the return order, the appropriate e-mail notification is sent to the user, notifying him whether the RMA has been approved or not (if approvals are being used). For approved RMAs, merchants can set up a return location to be sent in the e-mail notification.
4. After an RMA is approved, on the back end, Oracle Purchasing and Oracle Accounts Receivable work to complete the RMA processing, by fulfilling the order lines and generating credit memos.
5. RMAs are then available for the customer to track in Order Tracker.

Returns Functionality With and Without OM Release 11.5.10

This section discusses important differences in the returns functionality provided through Oracle iStore if you are using Oracle Order Management Release 11.5.10 versus earlier releases.

With Oracle Order Management Release 11.5.10

The following functionality exists without Oracle Order Management Release 11.5.10:

1. Merchants can implement pre-booking approval processes for returns.
2. The status of pending returns is User Working (regardless of whether pre-booking approval processes are being used). Return orders in Entered/User Working status are always part of a user's pending returns queue. These cannot be tracked as submitted orders in the Returns pages.
3. When the user submits the return (clicks Submit Return button):
 - If an Approval List has been set up in Order Management:
 - Order status moves from User Working to Pending Internal Approval
 - User will be able to see the returns in Pending Internal Approval status in the Returns subtab
 - Based on the approver's action, the return then moves to Booked or Rejected status.
 - If an Approval List has not been set up in Order Management, then the order status moves to Booked status.
4. Any errors from validations being done from Oracle iStore will show up in the Oracle iStore UI after the user adds the items to the return order (in the Create Return: Review and Submit page), prior to submission. See the section, "Validations

Performed in Returns Process", for more information.

5. E-mail notifications support --- Since Oracle iStore return orders are created with a transaction type having an order flow of "Order Flow - Return with Submission and Approval", when a return is Booked (irrespective of whether approval is setup or not), Oracle Order Management calls Oracle iStore to send an approval or rejection notification to the customer. Oracle iStore seeds two notifications for this purpose: Return Order Approval and Return Order Rejection. See the chapter, "Integrating Oracle iStore with Oracle Workflow", for details.

Note: If you are using Oracle iStore Release 11.5.10 with Oracle Order Management Release 11.5.10, set the profile option, IBE: Enable Return Pre-booking Approval, to enable the pre-booking approval process in Oracle Order Management.

Without Oracle Order Management Release 11.5.10

The following functionality exists without Oracle Order Management Release 11.5.10:

1. Merchants cannot implement pre-booking approval processes for returns.
2. The status of pending returns is Entered. Return orders in Entered status are always part of a user's pending returns queue. These cannot be tracked as submitted orders in the Returns pages.
3. The status of submitted returns is Booked.
4. Any errors from validations being done from Oracle iStore will show up in the Oracle iStore UI only after the user presses the Submit Return button. Additionally, the error messages that display are less detailed than Release 11.5.10 versions of Oracle Order Management. See the section, "Validations Performed in Returns Process", for more information.
5. E-mail notifications support --- When a customer submits a return, the return is immediately Booked and the user receives a confirmation e-mail from Oracle iStore giving him details of the return-order, with a note, "A return order has been created. You will shortly receive an e-mail confirmation for approval of the return items with the return location."

Merchants can customize the Oracle Order Management workflows to hard-code the return location in the workflow message.

Validations Performed in Returns Process

Oracle iStore performs several validations during the returns process. The stage at which errors display from validation failures and the detail to which error messages display depend upon whether the pre-booking approval feature is enabled and which Oracle Order Management version is installed. See the section, "Returns Functionality With and Without OM Release 11.5.10", for details. Also see the Oracle Order

Management product documentation.

See also: The section, "Rules and Guidelines for Returns"

Note: The detailed error messages described here apply to implementations running Release 11.5.10 and later versions of Oracle Order Management, with the pre-booking approval feature enabled.

- Quantity validations --- Oracle iStore does a validation check for returned quantity, to ensure that the quantity returned does not exceed the quantity ordered. In the submission process, Oracle iStore also checks that a quantity of zero has not been submitted. Lines that fail the quantity validation test show an error icon beside them, and an error message will display.
 - If the quantity validation fails for standard items (i.e., items which are not model bundles or configured items), an error message with part number, order number and returnable quantity is displayed, with an error icon near the Quantity field.
 - If the quantity validation fails for model bundles and configured items, a less detailed error message displays; this message shows no returnable quantity, but does have part number, order number, and an error icon near the Quantity field. Users cannot return components of a model -- only the entire model is returnable.

Note: For a model item, if an individual component has already been returned (allowed through Order Management), the quantity of the returned component is considered in the validations.

- Contact validations --- Oracle iStore confirms contact information of the customer.
 - For B2B users, the lines which fail for contact display an error icon next to the billing icon. If the user selects the icon, *Invalid Contact and Address* are displayed.
 - For B2C users, Oracle iStore verifies that all of the return lines have the same bill-to address. For errors, the error icon is displayed next to the Address drop-list.
- Organization, currency and account validations --- Before submitting pending returns with the current return, Oracle iStore validates that the pending returns have the same organization, currency, and account number as those retrieved for the current user's session.
- Item Returnable flag validation --- Oracle iStore checks that items are returnable.

Pending Returns Queue

Pending returns are return items that have been previously selected by a user and added to the pending returns queue by navigating with the items to the Create Return:

Review and Submit page. Pending return items have been Entered -- but not yet submitted -- into Oracle Order Management. After submission, the items are no longer part of the pending returns queue.

Return orders in Entered status are always part of a user's pending returns queue. Note that there will always be only one pending return queue per user at a time.

If a pending returns queue doesn't exist, Oracle iStore creates one. If the queue does exist and the user adds an identical item from the same order line, the item is not re-added to the queue. Instead, only the return quantity on the existing return line is incremented by the new return quantity specified by the user. The return reason is retained for the existing return line.

If items are available in the queue, a Pending Returns section will display on the following pages:

- Create Return: Select Items (single-order flow)
- Create Return: Search and Select Items (multiple-order flow)
- Create Return: Review and Submit -- This page is accessible by selecting Next on the above two pages, or by navigating to the Returns tab > Pending Return button. If no pending returns are in the queue, the pending returns button will not display. Users can cancel pending returns by navigating to this page.

Returns Process Flows

Merchants can set up returns with or without Oracle Workflow approval mechanisms. These mechanisms allow -- via automatically generated e-mails and associated processes owned by Oracle Order Management -- one or more people to approve or reject an RMA after the customer submits it, but before it is booked into Oracle Order Management. Functionality provided depends upon the Oracle Order Management version installed.

In addition, the Oracle Order Management version installed determines at what stage Oracle iStore validation errors display, the detail level of the errors, and the status of the returns after submission. See the section, "Returns Functionality With and Without OM Release 11.5.10", for information.

Single-Order Return Flow

The returns process flow for returning a single order is as follows:

1. A customer logs into a site and selects the Orders button to access the Track Orders page.
2. The customer selects an order number to access the Order Details page.
3. The customer selects the Return Items button to access the Create Return: Select

Items page. The Return Items button only displays if the profile option, IBE: Use Returns, is set to Yes, and -- for B2B users -- if the user has the IBE_CREATE_RETURN permission in his user role.

The Create Return: Select Items page shows items from the order just selected, with a zero quantity for each returnable item, and any pending returns.

In the Create Return: Select Items page, for each item in the order that the user is returning, he selects a return reason and enters a return quantity. A different reason and quantity can be specified for each item. Items which are not returnable will not have updateable Quantity or Return Reason fields, and the Returnable column will display No. Note that return reasons can be changed; see the section, "Step 7 - Customize Returns Lookups".

Note: If a return policy has been implemented, processing constraints set up in Oracle Order Management will determine whether or not the order line can be returned. See the section, "Step 5 - Set up Returns Policy".

4. The customer selects Next to continue the returns process.
5. The Create Return: Review and Submit page appears. At this point, the items are in the pending returns queue. Items that already existed in the queue also are pulled into the page. See the "Pending Returns Queue" section, for more information.
 - For quantity of each item, Oracle iStore defaults differently in a single-order flow versus a multiple-order flow:
 - Single-order flow --- The application uses the quantity specified by the user in the previous screen. Oracle iStore will only pick up returnable items with a quantity greater than zero.
 - Multiple-order flow --- The quantity is defaulted from the original order, and the user can change the quantity.
 - If an identical item *from the same order* already exists in the Pending Return queue, the quantities are merged, so that the new quantity reflects the additional product(s).
6. In the Create Return: Review and Submit page, the customer can:
 - Cancel the return order -- This deletes the return order from the data tables, which is different from canceling an order.
 - Change bill to address -- See the "Customers, Contacts, and Addresses Rules and Guidelines" section, below.
 - Add items to the return order.
 - Remove items from the return order; when the last item from a return order is removed, the return order is deleted.

- View details of the order in which this item was purchased.
 - Change return reasons. Note that return reasons lookups can be changed; see the section, "Step 7 - Customize Returns Lookups".
 - Change quantities -- In this case, the user should press the Recalculate button to recalculate totals.
 - Recalculate the return total, including line total, taxes, and return fees.
 - View related charges -- If applicable, these are return fees as setup by the merchant to return the goods; value is calculated by the Pricing Engine.
 - Enter a return address (order level for B2C and item level for B2B) where the return goods can be picked by the merchant. Note that the ship-from address will be copied from the original order at the line level. For B2C user, Oracle iStore will show all the valid addresses from the address book in a list, and the address selected by the user will be used for all the line items in the return order. B2B users can specify the ship-from address at the item level. The addresses available to the user are the same as in the checkout process (i.e., the user's own addresses and/or organization addresses). If either a B2C and B2B user does not have a valid address, they can create new addresses in the address book and then use those addresses in the returns flow.
 - Submit the return
 - Navigate to other areas of the Customer UI -- When the customer does this, leaving the Create Return: Review and Submit page, the return becomes part of the pending returns queue. He can return to the Returns tab > Pending Returns button to re-access this page.
7. The customer selects Submit Return to submit the return. Several validations are performed at this stage -- see the section, "Validations Performed in Returns Process".
- See the section, "Returns Functionality With and Without OM Release 11.5.10", for important information about returns functionality.
8. Oracle iStore displays a confirmation page with the return order number, and sends a confirmation e-mail notification to the user with the relevant return details.
9. If the merchant has set up returns to require approvals:
- As the return moves into the approvals stage, its status changes to Pending Internal Approval.
 - Approver(s) receive e-mail notification that a return order has been submitted

for approval. If a hierarchy of approvers has been implemented, a notification is sent to the first approver. If the first approver rejects the return, its status changes to Rejected; if he approves it, the next approver in the hierarchy receives the e-mail notification.

- If any approver rejects the return order, its status remains Rejected.
- If the return order is approved, its status changes to Booked and it is processed into Oracle Order Management.

Multiple-Order Return Flow

The returns process flow for returning items from multiple orders is as follows:

1. A customer logs into a site and selects Orders > Returns. The Returns page only displays if the profile option, IBE: Use Returns, is set to Yes. The Returns page displays all existing returns. A B2B user with the IBE_VIEW_RETURN_ORDER permission can see all of his organization's return orders. If he does not have this permission, he can still see his own return orders.
2. The customer selects the Return Items button. For B2B users, the Return Items buttons only displays if the user has the IBE_CREATE_RETURN permission in his user role.
3. The Create Return: Search and Select Items page appears. If applicable, this page displays pending returns in addition to the search utility. See the "Pending Returns Queue" section for more information.

In the Create Return: Search and Select Items page, users can search by serial number, part number, or order number. Only exact matches are allowed, and the search utility does not support wildcard characters. The search utility is case-insensitive.

Serial Number Search:

See also: the section, "Step 9 - Verify Inventory Setup for Items with Serial Numbers"

- Users must search for serial numbers one at a time.
 - Found serial numbers display in the search results table. Users select an icon in the Serial Number column to view a pop-up window with the details of one or multiple serial numbers.
 - Serial numbers are not displayed in any other areas of the Order Tracker UI; they appear only in the Create Return: Search and Select Items page.

Order Number or Part Number Search:

- To search by order number or part number, users can search for more than one at a time, putting a space between the numbers in the search textbox.

- Orders or part numbers retrieved that are referenced by serial numbers will display the serial-number pop-up icon in the Serial Number column.
- Items located by the search utility display in the Results table, along with related information, such as part number, order number, quantity ordered, and price. Items which cannot be returned will not be selectable, and the Returnable column will display No instead of Yes.

Note: If a return policy has been implemented, processing constraints set up in Oracle Order Management will determine whether or not the order line can be returned. See the section, "Step 5 - Set up Returns Policy".

1. The user selects the items to be returned and selects Add to Return. Oracle iStore displays the Create Return: Review and Submit page. See the section, "Single-Order Return Flow", beginning with step 6, for remaining steps in the flow.

Tracking Returns

Customers can track return orders by selecting either of the following after logging into the Customer UI:

- Orders, Returns -- In the Returns page, customers can search for returns, and view summarized or detailed views of returned items, including statuses.
- Orders, Track Orders -- In the Track Orders page, customers can search for orders and view summaries of orders. After drilling down into the order details, customers can see details about returned items referenced within the orders, if applicable -- If the user has already returned one or more items of the order being viewed, those return order lines will be shown in the Related Returns table. Return order lines from pending or cancelled orders will not be shown.

Returns Profile Setting and UI Display

If the profile option, IBE: Use Returns is Yes:

- Orders with Order Category Code = ORDER will be displayed in the Track Orders subtab only
- Orders with Order Category Code = MIXED and at least one line with Line Category Code = ORDER will be displayed in Track Orders subtab
- Orders with Order Category Code = MIXED and at least one line with Line Category Code = RETURN will be displayed in Returns subtab
- Return orders with Order Category Code = RETURN will be displayed in Returns subtab only

Thus, a Mixed Order with lines of both Line Category Code as ORDER and RETURN can be queried and displayed in both Track Orders and Returns subtabs.

If IBE: Use Returns is No or not set, all types of orders/returns will be displayed in the Track Orders subtab.

Note that users will see all orders which have at least one order line.

Rules and Guidelines for Returns

Following are rules and guidelines for Returns functionality. For additional details related to Oracle Order Management, see the *Oracle Order Management Implementation Manual*.

General Rules and Guidelines

Following are some general rules and guidelines for Returns.

- Although Oracle Order Management supports several return types, Oracle iStore supports only Returns for Credit. Returns for Credit means that the customer is credited the money spent on the item, less any fees imposed by the merchant.
- Oracle iStore supports only, "At the price of the original order" pricing.
- In Oracle Order Management, the flow of an RMA order or order lines is determined by Order Type at the header (cart) level and the Line Type at the line (item) level. A return line is indicated in Order Management by its Line Type, negative item quantity, and line total price.
- Each order type and each line type is associated with a workflow process in Oracle Order Management. Line types can be variations of Return, such as Return with Approval, Return for Credit Only, etc., and have a line type category of RETURN. Out-of-the-box, Oracle iStore uses the default line type as the one defined in the Transaction Type form as the default line type.
- A return quantity cannot be greater than ordered quantity.
- An order line can be returned multiple times in multiple return orders, but the combined return quantity cannot be greater than ordered quantity. If the user has already returned some quantity, then he can only return the original ordered quantity minus the returned quantity. This check is done at the time the return order is booked. If his return order does not comply with these rules, the user will see the error message, *Invalid quantity*.
- Returned quantities are shown in negative numbers in Oracle Order Management. Oracle iStore's UI, however, always shows the quantities as positive numbers.
- Oracle Order Management does not store a return location for a return order.

Therefore, merchants must specify the return location in the Oracle Order Management workflow's e-mail notification message.

- In Order Tracker, you can view orders placed through other Oracle applications, such as Depot Repair, Oracle Order Management, and Oracle Quoting. For this reason, Oracle iStore supports the viewing of mixed orders in the Order Tracker (including Returns) pages. Mixed orders with at least one return line will display. When users view details of a mixed order, there are three sections:
 - Order Items -- This area shows items ordered in the order being viewed.
 - Return Items -- This area shows lines being returned with the order being viewed, whether or not they were part of this order number or another order number.
 - Related Returns -- This area shows return lines for the order number being viewed, which were returned earlier than the order being viewed.
- Security on returns -- Only the user who initiated a pending return can modify it, until he submits it.
- Re-load return message -- If a sales representative and a user are simultaneously updating a return, the user receives an error message indicating he should re-load the return page.
- Return charges -- Merchants can setup return fees using modifiers. When setting up charges, merchants can specify special charges to be applied specifically to returns, for example, freight charges, restocking fees, return handling, damages, etc. These fees are subtracted from the total return amount, and the UI display reflects the adjusted amounts.

Rules and Guidelines for Items

Following are rules and guidelines for items.

- In order for it to be returnable, a product's Returnable flag in Inventory must be active. See the section, "Step 6 - Verify Oracle Inventory Returns Flag".
- Order lines from orders in Entered or Cancelled status cannot be returned.
- Customers can return model bundles and configured items, but Oracle iStore does not support returning only components of the model/configured item -- these items are returnable as a whole item and not as individual items.
- Network container items and their child items are not returnable. If an order has only network container items, the Return Item button in the order detail page does not display. If the order has mixed (returnable and non-returnable)

telecommunications service ordering (TSO) items, then the Return Item button is shown. In the Create Return: Select Items, page, network container items will display with Returnable column entry set to No.

- In Order Tracker, when viewing the details of an order with returns, in the Return Items table, the column named Total Price for non-TSO items is renamed Charges for TSO items.
- Serviceable items can be returned through Oracle iStore, but service items cannot.
- Decimal quantities can be allowed for returnable items.
- "Trade-in Line" lines in Mixed Orders (which have line Category as "RETURN") cannot be returned.
- An item cannot violate the return policy of the merchant. A return policy can be set up using Processing Constraints and additional checks are possible through the API.

Rules and Guidelines for Returns Page

Following are rules and guidelines for the Returns subtab and pages.

- The Returns subtab and associated Returns page only display if the profile option, IBE: Use Returns, is set to Yes. In addition, B2B users must have the IBE_CREATE_RETURN permission to see the appropriate functionality on the page. See the "Implementing Returns" section for more information.
- Return items show quantity as positive and total item price as negative, in parentheses. Sales-representative created quotes containing trade-in line items display the amount as negative as well.
- User permissions do not apply to B2C users; therefore, these users will always see all returns functionality, as long as IBE: Use Returns is Yes.
- When a user navigates to the Returns page, all orders submitted in x days will be shown. Note that "submitted" means:
 - Pre-booking feature disabled: Submitted means Booked/Closed/Cancelled return orders
 - Pre-booking feature enabled: Submitted means returns in Pending Internal Approval and Booked/Closed/Cancelled return orders"Not submitted" means pending returns or returns in Entered/User Working statuses.
- In Oracle iStore's Returns pages, you can modify the LOV that displays the reasons

a user is returning an order. See the "Implementing Messages and Prompts" chapter for information on the default values for the Returns lookup.

Rules and Guidelines for Users and Organizations

This section contains Returns rules and guidelines specific to users and organizations.

- In order for a customer to initiate a return order:
 - An order must exist with at least one returnable product.
 - B2B users must have the IBE_CREATE_RETURN permission in their user roles.
 - For a pending return to be retrieved and submitted, it must have the same party ID, currency code, operating unit, and customer account ID as those retrieved for the logged-in user's current session.
- For B2B customers, returns are allowed within an organization, providing the order has been booked in the same organization, currency, and account, as that of the user creating the return order. If these do not match, a message displays directing the customer to contact his sales representative.
- A B2B user can view the submitted returns of another user in the same organization, but cannot view the pending returns of another user. Note that B2B users must have the IBE_VIEW_RETURN_ORDER permission to view orders across the organization.
- For B2C users, if the merchant has enabled returns, all users will see the Return Items button in the Order Details page and the Returns subtab within the Orders menu, regardless of whether they have returnable items -- for B2C users, there is no way to disable the Returns functionality by user or user role.

Customers, Contacts, and Addresses Rules and Guidelines

Following are some rules and guidelines surrounding customer information, contact information, and address information with returns:

See also: the section, "Validations Performed in Returns Process"

Note that *order level* is also known as *header level* and *cart level*. And, *line level* is interchangeable with *item level*.

Order-Level Address Behavior:

The following is the behavior for addresses at the order level.

Bill-To Address:

- A bill-to customer and address are mandatory at order level for a return order.

- Address defaulting: At header level, logic on how bill-to addresses are selected for B2B and B2C users is as follows:
 - Oracle iStore selects the bill-to primary address from the customer's address book.
 - If this doesn't exist, Oracle iStore selects the first non-primary bill-to address from the address book.
 - If this doesn't exist, Oracle iStore selects the primary ship-to from the address book
 - If this doesn't exist, Oracle iStore selects the non- primary ship-to from the address book
 - If this doesn't exist, Oracle iStore selects the first valid bill-to address from the original order lines.
 - If there is no valid address, Oracle iStore shows an error message directing the user to create a new address.
- B2B users cannot change bill-to addresses at the order level -- only line-level billing data is exposed for B2B users.
- B2C users cannot change bill-to address at the line level -- only header-level billing data is exposed for B2C users

Ship-To Address:

- A ship-to customer and address are **not** mandatory at order level for a return order.
- Address defaulting: Oracle iStore does not default any value for ship-to address at the header level. Hence, ship-to defaulting occurs per Oracle Order Management's defaulting rules.
- For both B2B and B2C users, Oracle iStore does not expose ship-to addresses in the Returns pages. Thus, the user cannot modify the ship-to address at the order level.

Item-Level Address Behavior:

The following is the behavior for addresses at the line level.

B2B users, Bill-To:

- The bill-to address and contact for the return lines in the pending return queue are defaulted from the original order.
- If any of the bill-to addresses copied from the original order are invalid, Oracle iStore shows an error message when the user submits the return; the user can then

modify the address.

- The customer can modify the bill-to contact and address at the return-line level, by accessing the Line Level Billing page through the Billing icon. Note that in these contact/address pages, the user will not be able to create a new contact/address. When the user changes the bill-to contact, the existing bill-to address is set to null, and the user needs to select an address for the contact or one of the organization contacts.
- The user can also select View all Contacts to select a different contact and address.

B2B users, Ship-To:

- The bill-to address and contact for the return lines in the pending return queue are defaulted from the original order.
- Since Oracle iStore does not expose these addresses in the Returns UI, the user cannot modify the ship-to address at the item level.

B2C users, Bill-To:

- When a B2C user either updates the header level bill-to address or submits the return order, Oracle iStore propagates the bill-to address chosen at the order level to all the return lines. Thus, for Oracle iStore submitted returns, the bill-to address on the return-lines will be same as the bill-to on the return order.

B2C users, Ship-To:

Behavior is the same as B2B line-level ship-to behavior.

Note: No users can change the bill-to customer.

Implementing Returns

Set up Oracle iStore's returns functionality according to the steps detailed in this section.

For Oracle Order Management setup information, see the Oracle Order Management documentation.

Following are the steps to enable returns in Oracle iStore:

- Step 1 - Set Profile Options
- Step 2 - Verify B2B User Permissions
- Step 3 - Set up Transaction Type
- Step 4 - Set up Returns with Approval
- Step 5 - Set up Returns Policy"

- Step 6 - Verify Oracle Inventory Returns Flag
- Step 7 - Customize Returns Lookups
- Step 8 - Set up E-Mail Notification Support
- Step 9 - Verify Inventory Setup for Items with Serial Numbers

Step 1 - Set Profile Options

Set the following profile options (see the appendix, Profile Options, page A-1, for more information on the profile options):

1. IBE: Use Returns --- Set to Yes to enable the returns functionality.
2. IBE: Return Orders Transaction Type --- Set to the transaction type you wish returns to be created under (for example, set to the transaction type created in the section, "Step 3 - Set up Transaction Type"). .
3. IBE: Enable Return Pre-booking Approval --- Set to Yes only under certain conditions described in the "Profile Options" appendix. Otherwise, leave the profile option set to No, which is its default value.
4. IBE: Enable Return Policy --- Set to Yes only if implementing additional processing constraints for return policies.
5. Set the Quoting parameter, Default Salesrep, to the default sales representative for sales assistance. See the "Oracle Quoting Integration Parameters" topic in the appendix, Profile Options, page A-1, for more information.

See the *Oracle Order Management Implementation Manual* for setup information related to Oracle Order Management.

Step 2 - Verify B2B User Permissions

Verify that the B2B customers who will be submitting returns have the IBE_CREATE_RETURN permission in their user role. Only B2B users with this permission will be able to access the Return Items button in Order Tracker.

To view returns across their organizations, B2B users must have the permission, IBE_VIEW_RETURN_ORDER.

Step 3 - Set up Transaction Type

You may use the following steps as an example setup for Oracle iStore returns transaction type. See the *Oracle Order Management Implementation Manual* for additional setup information.

Important: For Oracle iStore returns, only set up transaction types using Order

Category = Return. Mixed should **not** be used and will not work.

1. As Order Management Superuser, navigate to the Transaction Types window and set up a new Order Type with following attributes:
 - Name/Description – iStore RMA (user definable)
 - Order Category – Return
 - Transaction Type Code – Order
 - Workflow Fulfillment Flow/Order Flow -- Depends on whether the returns pre-booking feature is enabled:
 - If the profile, IBE: Enable Returns Pre-Booking Approval, is set to No, use Order Flow - Return with Approval. If this workflow is used, you can enable an approval process, after the return is Booked in Order Management and if an Approval List has been set up.
 - If the profile, IBE: Enable Returns Pre-Booking Approval, is set to Yes, use Order Flow - Return with Submission and Approval.
 - See the section, "Returns Functionality With and Without OM Release 11.5.10", for more details on the returns pre-booking approval feature.
 - Sales Document Type – Sales Order
 - Default Transaction Phase – Fulfillment (applicable only if the returns pre-booking feature is enabled)
2. Associate a price list with the above transaction type if using return fees, multi-currency price lists, and/or Order Management defaulting rules based on price list.
3. Enter other required/optional information and Save.
4. Set the Default Return Line Type in the Main tab to a required value. This line type will be used as the line type for all return lines in a return created through Oracle iStore. The error, "Line type Id Is missing" is seen if this setup is not done. This is a mandatory setup.
5. For this transaction type, navigate to the Assign Line Flows window. In this window, choose the Line Type selected as Default Line Type in the above step and assign a Process Name to it (for example, "Line Flow - Return for Credit Only"). The error, "No workflow has been assigned to this transaction type" is seen if this setup is not done. This is also a mandatory setup.
6. Document Sequence Assignment --- Assign the RMA Document Sequence on the newly created, iStore RMA, transaction type.

Step 4 - Set up Returns with Approval

Optionally, merchants can set up returns to use an approval mechanism before they are submitted to Oracle Order Management, if they are using at least Release 11.5.10 of Oracle Order Management (see the section, "Returns Functionality With and Without OM Release 11.5.10").

The approvals use standard Oracle Workflow processes and related e-mail notifications owned by Oracle iStore. The e-mail notifications are: Return Order Approval and Return Order Rejection. See the chapter, Integrating Oracle iStore with Oracle Workflow, page 34-1, for details.

By setting up returns with approval, administrators can approve or reject return orders before they are processed in Oracle Order Management. In addition, merchants can specify a hierarchy of approvers.

To set up returns with approval:

1. Approver List Setup --- Set up a new Approver List with following attributes:
 - List Name/Description – iStore RMA Approvers/iStore RMA Approvers
 - Transaction Type -- iStore RMA
 - Transaction Phase – Fulfillment
2. Select one role or responsibility that will be responsible for approvals.

Note that this LOV will display all applicable Oracle Workflow roles or Oracle Applications (FND) responsibilities. Selecting a Workflow role will enable all the people attached to that role to get the e-mail. Similarly, the same behavior will occur with an FND responsibility.

Step 5 - Set up Returns Policy

Optionally, set up a returns policy which utilizes Oracle Order Management processing constraints functionality. Processing constraints allow merchants to control changes to sales orders and returns at all stages of the order or line workflows. Processing constraints provide:

- The ability to control changes based on user responsibility
- The ability to call custom PL/SQL code to determine whether a processing constraint condition evaluates to true
- The ability to constrain operations at any point in the order or line process flow

See the *Oracle Order Management Implementation Manual* for additional setup information.

Step 6 - Verify Oracle Inventory Returns Flag

Customers can select an order line to return only if the item is returnable. This is enabled by selecting the Returnable checkbox in the Oracle Inventory form (under Order Management tab). For more information, see the *Oracle Inventory User's Guide*.

Step 7 - Customize Returns Lookups

Return Reasons and Returns search query values exposed in the UI are Oracle Applications lookups which can be customized to fit your business needs. See the chapter, *Implementing Messages and Prompts*, page 16-1, for details.

Step 8 - Set up E-Mail Notification Support

Depending upon which version of Oracle Order Management you are using, you may need to perform additional setups for e-mail notifications, including optionally specifying a return location in the notification messages. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for more information.

Step 9 - Verify Inventory Setup for Items with Serial Numbers

In the Oracle Inventory Master Items form, for each applicable product, set the Serial Controlled property to one of the following values:

1. At Receipt
2. At Sales Order Issue
3. Predefined

If the serial-controlled flag is not set for an item, in the Create Return: Search and Select Items page, users cannot search by serial number, nor will the Serial Number column show the serial number pop-up icon.

Until the order is shipped to the customer, the serial number search does not return a record in Oracle iStore.

In addition to the above conditions, for proper setup, the serial numbers should have been generated for the order line in Oracle Inventory.

For more information, see the *Oracle Inventory User's Guide*.

Oracle iStore and Party/Account Merge

Party Merge and Account Merge functionalities are part of the Data Quality Management tools provided by Oracle Trading Community Architecture (TCA). They allow you to identify and resolve duplicates present in the Trading Community registry. Different applications throughout the Oracle E-Business Suite have data associated with both Parties and Customer accounts. Any references to Party and

Accounts should be updated when Parties or Accounts are merged. This ensures data integrity across the Oracle E-Business Suite.

This section discusses Oracle iStore's behavior with TCA's concurrent programs which effect Party/Account Merge operations.

For more information on the TCA functionality discussed in this section, see the *Oracle Trading Community Architecture Administration Guide*.

Party/Account Merge Overview

Party Merge and Account Merge are TCA utilities which merge or transfer party and account data in the trading partner database. There are important differences between the two operations, as discussed in the following sections:

- "Party Merge"
- "Customer Account Merge"

Party Merge

Party Merge eliminates duplicate data in the registry layer in order to keep the trading partner database accurate and clean. It consolidates duplicate parties after they have been entered in the system. The merging enables users to have a single view of each party.

Party Merge can merge information for:

- **Parties:** Merge duplicate parties
- **Party sites:** Merge duplicate party sites for a party; for example, merge duplicated manufacturing locations of a party
- **Party relationships:** Related child entities are merged, such as party relationships, contact information, party profiles, customer accounts and information obtained from third-party sources

There are two types of operations performed by Party Merge:

- **Merge:** Inactivates an entity and transfers its dependent entities
- **Transfer:** Moves an entity from one parent to another, if a duplicate does not exist

Example:

ABC Company has implemented the Oracle E-Business Suite

While checking the quality of its data, ABC Company determines that duplicate records exist for a party, Vision Corporation. Data for this party were entered into the database under the names Vision Corp. and Vision Inc. Using the Party Merge utility, ABC Company plans to merge the two Vision parties -- Vision Corp. and Vision Inc.

Party Merge will:

1. **Inactivate** the Vision Corp. party record
2. Either **merge** or **transfer** the details of Vision Corp., e.g., transfer or merge party sites: 500 Oracle Pkwy. and 600 Vision Pkwy.
3. **Transfer** party site 500 Vision Pkwy. to Vision Inc.

Customer Account Merge

Customer Account Merge is a tool that merges transactions from one customer account to another customer account. The merging or transferring of these duplicate records allows the consolidation of customer account transactions --- such as orders, invoices and payments --- into one customer account relationship.

Oracle iStore's Behavior with Party/Account Merge

Oracle iStore supports and treats Party/Account Merge in various ways, as discussed in this section.

In Party/Account Merge operations, Oracle iStore's access to party data is accomplished through foreign keys on the data. These are summarized in the section, "Oracle iStore Foreign Keys Used in Party/Account Merge", below.

Shopping Lists

Account Merge updates both the party and account IDs of the merge-from party to point to the merge-to party. Thus, merge-to party, after the account merge, will see additional shopping lists from the merge-from party.

In addition, with Party or Account Merge:

- Merge-to users will have access to the same shopping lists as before the merge.
- New shopping lists are created during the transfer.
- If more than one shopping lists exists for a user, these will **not** be merged into a single list.

The Oracle iStore foreign key to the party and account layer for shopping lists data is IBE_SH_SHP_LISTS_ALL.

Express Checkout Preferences

In a Party Merge, Express Checkout preferences do not change in the merge-to party.

The Oracle iStore foreign key to the party layer for Express Checkout is IBE_ORD_ONECLICK_ALL.

Site Access Restrictions

In a Party Merge, merge-to settings override merge-from settings for access restrictions. The following table, Site Access Restrictions - Expected Behavior After Party Merge, shows the expected behavior of these preferences after Party Merge.

Site Access Restrictions - Expected Behavior After Party Merge

Preference	Merge-from	Merge-to	Expected Behavior
No restriction	On or Off	On or Off	Merge-to settings take priority and are not changed.
Only the following organizations can access the site	On	On	Additional organizations are added to the merge-to list from the merge-from list.
Only the following organizations can access the site	Off	On	Merge-to settings take priority and are left On.
Only the following organizations can access the site	On or Off	Off	Merge-to settings take priority and are left Off.
The following organizations cannot access the site	On	On	Additional organizations are added to the merge-to list from the merge-from list.
The following organizations cannot access the site	Off	On	Merge-to settings take priority and are left On.
The following organizations cannot access the site	On or Off	Off	Merge-to setting take priority and are left Off.

The Oracle iStore foreign key to the party layer when dealing with site access is: IBE_MSITE_PRTY_ACCSS.

Shared Carts

In Party Merge, Oracle iStore shared carts have the following rules:

- Shared carts in the merge-from party are transferred to the merge-to party
- If parties have the same cart, then the merge-from cart is ignored (i.e., won't be shared twice to the merge-to user)

In Account Merge, Oracle iStore shared carts follow these rules:

- Account ID and Party ID of the merge-from party will be changed to that of the merge-to party
- A duplicate row is defined as having identical party_id, account_id and quote_header_id

The Oracle iStore foreign key to the party layer for shared carts is IBE_SH_QUOTE_ACCESS.

Active, Default-Named, and System-Saved Carts

In Party or Account Merge, the following is the behavior for active, default-named, and system-saved carts:

Note: Default-named and system-saved carts are carts that are named by the system. See the section, "System-Saved and Default-Named Shopping Carts", for details, for more information.

- Active carts --- No changes are made to any active cart items or names in the merge-to party or account.
- System-saved carts --- System-saved carts, whose default name is "Store Saved", are not altered in any way in the merge-to party or account.
- Default-named carts --- These carts, whose default name is "Store", are renamed to the default name for system-saved carts ("Store Saved") in the merge-to party or account.

The Oracle iStore foreign key to the party layer for active carts is IBE_ACTIVE_QUOTES_ALL.

Running Party and Account Merge

By running Party Merge without Account Merge there is the possibility for a party to have two accounts. To avoid multiple accounts to one party, it is recommended to run Account Merge after Party Merge.

See the following sections for examples on how the accounts are treated in the two scenarios:

- "Party Merge Only Scenario"
- "Run Party Merge Then Account Merge Scenario"

Party Merge Only Scenario

In the scenario where only Party Merge is run, the following table, Account Numbers in Party Merge Only Scenario, shows what should be expected:

Account Numbers in Party Merge Only Scenario

Merge	Party ID	Account ID
Before Party Merge		
To	1000	2000
From	1100	1800
After Party Merge		
To	1000	2000
		1800

Party ID 1000 will have two accounts. At login, the system will pick the account **created first**. In the example above, account 1800 (from system) will be used at logon.

Run Party Merge Then Account Merge Scenario

In the scenario where Account Merge is run **immediately after** Party Merge, the following table, Account Numbers in Account Merge After Party Merge Scenario, shows what should be expected:

Account Numbers in Account Merge After Party Merge Scenario

Merge	Party ID	Account ID
Before Party Merge and Account Merge		
To	1000	2000

Merge	Party ID	Account ID
From	1000	1800
After Party Merge and Account Merge		
To	1000	2000 (1800 merged)

Oracle iStore Foreign Keys Used in Party/Account Merge

The following table, Oracle iStore Foreign Keys Used in Party/Account Merge, shows the foreign keys used in Party/Account Merge.

Oracle iStore Foreign Keys Used in Party/Account Merge

Entity Name	Description
IBE_SH_SHP_LISTS_ALL	Shopping lists
IBE_ORD_ONECLICK_ALL	Express Checkout preferences
IBE_MSITE_PRTY_ACCSS	Store access restrictions
IBE_SH_QUOTE_ACCESS	Shared carts
IBE_ACTIVE_QUOTES_ALL	Active carts

For more information on the TCA functionality discussed in this section, see the *Oracle Trading Community Architecture Administration Guide*.

Shopping Cart Purge

Oracle iStore shopping carts can be purged to free up space in the underlying iStore and Quoting tables and improve performance for active shopping carts and quotes. For information on purging shopping carts, see the Purging Quotes section in the *Oracle Quoting Implementation Guide* and *Oracle Quoting User Guide*.

Implementing User Management

This chapter covers the following topics:

- Overview of Implementing User Management Chapter
- Overview of User Management
- Integration with Oracle User Management
- User Registration Overview
- User Management Integration with Other Oracle Applications
- Ensuring Proper Dependency Setup for User Management
- User Types Overview
- Registering Using Oracle iStore
- Managing Business Users with Oracle iStore
- User and Company Profile Management Overview
- Setting up Self-Service Login Assistance
- Establishing Multicustomer Access Relationships

Overview of Implementing User Management Chapter

This chapter contains information on implementing and maintaining user management and site registration functionality in Oracle iStore.

Overview of User Management

User management is the process of registering a user and thereafter maintaining the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements. User management involves registering new users, modifying existing users, approving or rejecting user approval requests, setting up enrollments and registration templates,

assigning users to business accounts, and more. For self-service registration (such as provided through Oracle iStore's Customer Application), the following two options are available for setting up roles, registration processes and system-administrator-level user maintenance:

- Oracle CRM System Administration Console (accessible by logging in as System Administrator through the JTF login interface)
- Oracle User Management (accessible by logging in as System Administrator through the AppsLocalLogin interface)

Leveraging the above user management framework applications, you can use Oracle iStore to register users, configure registration pages, approve users, manage user profile information, and more.

This chapter discusses the capabilities and functionalities of user management within Oracle iStore, with some summarized information about using Oracle CRM System Administration Console. Other than one section on integrating with Oracle User Management (UMX), no information is provided about UMX. For complete information on utilizing the capabilities of these other user management framework application, see:

- *Oracle E-Business Suite CRM System Administrator's Guide*
- *Oracle E-Business Suite Security Guide*

Key Terms and Definitions

This section provides key terms and definitions related to user management. Note that the functionality described here is the functionality of either Oracle iStore or Oracle CRM User Management, not that of Oracle User Management.

- **Approval Definition:** Approval definitions use Oracle Workflow to track and route request(s) to the approvers. An approval definition can deliver an e-mail notice to the approvers. Both user types and enrollments can share the same approval definition. The e-mail notifies what types of requests are being requested (user type or enrollment) and what action the approver needs to take.
- **Business User:** Business-to-business (B2B) users represent companies whose information is stored in Oracle Trading Community Architecture. Typically, when B2B users self-register, they enter an Organization ID (Registry ID) created when the first user from that company registered.
- **Enrollment:** An enrollment is a set of add-on services that you can receive during or after registration. "Services" include responsibilities, roles, approval definitions, and registration templates. One enrollment corresponds to zero or one responsibility, zero or one enrollment template, zero or one enrollment approval and zero or more roles. Enrollments are application specific and can be tied to user types.

- **Permission:** A unit of privilege that is granted to a user within his user role. It usually serves to grant a certain type of access to a resource. Resources are application elements such as objects or methods of objects. A resource can have unique permissions for each way that it can be accessed.
- **Primary User:** An administrative B2B end-user charged with fulfilling user management functions for his company. Typically, when the first B2B user registers from a company, an Organization ID (Registry ID) is created.
- **Responsibilities:** When a registered user initially logs in, the system checks the user's current responsibility and then passes the user into the menu structure associated with the HTML application to which that responsibility is linked. In this way, different user types can have different responsibilities and therefore can have different menus assigned to them. Responsibilities can either be granted automatically upon registration, through the user management framework, or on a case-by-case basis by an administrator.
- **Roles:** Within each HTML page, granular permissions control which resources on a page a user is allowed to access. These resources may be a button, a data manipulation permission, a view permission, and so on. In Oracle HTML applications, permissions are grouped into roles which can then be granted to users. Roles are granted either automatically (depending upon your configuration) or on a user-by-user basis by an administrator.
- **User Profile:** User profiles, which are associated with responsibilities, are sets of user interfaces that give users access to their personal data and preferences.
- **User Profile Menus:** User profile menus are groupings of user profile pages which are relevant to a particular responsibility. User Profiles are user interfaces to users' personal data and preferences. A number of responsibilities can share the same user profile menu.
- **User Type:** A category of users that caters to the specific needs of an application's business requirements. User types allow flexible and extensible ways for defining, categorizing and implementing behavior of users. A user type is associated to only one template, one responsibility, zero or one approval, zero or more enrollments, and zero or more roles. Examples include: *Register your company*, *Register as individual*, and *Register as a user of an existing company*. For all Oracle iStore seeded user types, roles and responsibilities are not directly associated to the user type; rather, they are always bundled into enrollments, which in turn are attached to the user types.
- **User Type Templates:** Applications require varying pieces of information to register different types of users. User Type templates refer to JSP files that are used to capture the registration information that is special to a particular user type, and the registration handler for the specific user type. Oracle iStore user types are associated to specific user type templates, defined in the Oracle iStore Template

Manager, and do not use Oracle CRM User Management registration templates.

Integration with Oracle User Management

Oracle iStore offers support for allowing customer registration through the Oracle User Management framework.

To allow you to use Oracle User Management with Oracle iStore, the following data is supplied:

- **Seeded user management grant:** iStore Registration Guest Grant
- **Seeded user management menu:** iStore Registration Menu
- **Seeded user management function:** iStore Registration

Following are high-level steps to enable registration through Oracle User Management:

1. Set the profile option, Local Login Mask, to 127 to enable the registration feature.
2. Create a registration process (for example, iStore Registration) in Oracle User Management.
3. Set the profile option, UMX: Register Here Link: Default Registration Process, at server level.

In the above setup, the Register Here link takes users to an Oracle User Management central registration page. In addition, the system uses the Oracle User Management Forgot Password feature and related e-mail notification instead of Oracle iStore's own Forgot Password feature/notification. Oracle User Management is accessible by logging in as System Administrator through the AppsLocalLogin interface. For more information on Oracle User Management, see the *Oracle E-Business Suite Security Guide*.

User Registration Overview

Customers who wish to access Oracle iStore's Customer Application must register and be approved (if your implementation requires approval) before they have full permissions in the sites. Oracle iStore provides registration and user management screens for customer users; however, most user registration setups and associated processes are provided through a common registration and user management framework supplied by the Oracle CRM System Administrator Console.

The Oracle CRM System Administrator Console is accessible by logging into the Oracle CRM Login Servlet (JTF login) as system administrator. System administrators have the ability to configure user types, roles, enrollments, registration templates, and approval processes. See the online help accessible from the System Administrator Console for more information.

Users begin registration by selecting the Register link, and then select their user type from a list of user type choices. The user framework supports a variety of user types and approval scenarios. In addition, you can use enrollments to automatically tie specific registration data to user types.

Note: Do not use the Oracle CRM System Administrator Console to register users of Oracle iStore. Use Oracle iStore's registration pages and user management pages instead. These pages are available in the Customer Application after your setup of Oracle iStore is complete. See the section, "Registering Using Oracle iStore", for details.

Registration involves filling in personal and company data (if applicable), and then waiting for approval (if required) before accessing the Web sites. Depending upon the approval mechanisms in place, users are either automatically approved or approved by an administrative user. Note that in a multiple-approver scenario, all approvers must approve a user before he is granted access. Integration with Oracle Workflow (using both Oracle CRM Technology Foundation and Oracle iStore workflows) provides e-mail notification of user registration events and pending approvals.

User Management Integration with Other Oracle Applications

Users of Oracle iStore, Oracle iSupport, and Oracle Partner Management can attain an integrated user registration and management experience through the common registration framework and Oracle iStore's site management capabilities. These capabilities are summarized in this section. Also see the following chapters:

- Implementing Site Management, page 5-1
- Integrating Oracle iStore with Oracle iSupport, page 25-1
- Integrating Oracle iStore with Oracle Partner Management, page 27-1
- Customer Application Process Flows, page 37-1

Common Registration Framework Benefits and Behavior

The highlights of the common registration framework are discussed below.

- The framework lets implementers provide common registration pages for integrating applications. A common registration page displays all of the user types available for integrating applications' users.
- Brandable registration pages and common look and feel can be achieved through Oracle iStore Template Manager. Oracle iStore provides common registration screens for Oracle iSupport, Oracle iStore, and Oracle Partner Management that support a brandable and customizable look and feel and leverage existing Oracle CRM Technology Foundation APIs.

- The framework utilizes the user type definition capabilities of the Oracle CRM User Management Framework, but the registration screens are created and managed through Oracle iStore's Template Manager. Merchants can customize and brand these screens using the existing capability provided by the Template Manager.
- Oracle iStore provides support for users to register through a common Oracle User Management registration page.
- The framework features the ability to enable and disable the user types that display in the registration page. The registration page can be configured to display user types associated to the Oracle iStore framework that are not self-service-enabled. For each user type, specific enrollments automatically award sets of roles and responsibilities. In addition, you can activate additional seeded enrollments which award more responsibilities and/or roles.
- The site and user management integration allows implementers to create Oracle Partner Management partner sites and support partner functionalities, utilizing the Oracle iStore Customer Application as the entry point for partner registration and partner program enrollments.
- Using the framework, implementers can offer self-registration and approvals for non-primary users.
- The framework understands the Oracle CRM User Management Framework approval processes. It also understands the enrollments (explicit and implicit) associated to user types, and can launch approval processes if required.
- Oracle iStore also supports mapping content to three left and three right bins on registration and user type selection pages. In this way, the same content can be shown on both of these pages. Or, each bin could be mapped to different content per user type. See the chapter, *Implementing the Catalog*, page 9-1, for details.

User Type Support Across Applications

Integrated user management across applications provides registration and support for several user types within the Oracle iStore framework. Setup of user types is performed in the Oracle CRM System Administrator Console. A table listing the seeded user types, enrollment keys, and default responsibilities and roles can be found in the topic covering user type definitions in the appendix, *Seeded User Data*, page B-1. Following are the seeded enrollments for common user types.

- **Individual users:** Individual (B2C) users are associated to the default Oracle iStore and Oracle iSupport B2C user responsibilities and roles, via the following enrollments:
 - iStore (Individual User) --- This enrollment contains the seeded iStore customer responsibility. It is active by default.

- **Support Site: Individual User** --- This enrollment contains default Oracle iSupport B2C user responsibility and roles. It is not active by default; you must enable it.

These two default enrollments give B2C users the required ability to access Oracle iStore sites and Oracle iSupport via the Oracle iStore Customer UI (if the Support Site: Individual User enrollment is activated). By default, these users do not require approval. No roles are assigned to this user type, or to the enrollment, out-of-the-box.

- **Non-administrative business users (B2B users):** Typically, non-administrative B2B users are associated to the default Oracle iStore and Oracle iSupport non-primary B2B user responsibilities and roles, via the following enrollments:
 - **iStore (Business User)** --- This enrollment contains the seeded Oracle iStore customer responsibility and the non-administrative business user role.
 - **Support Site: Business User** --- This enrollment contains default Oracle iSupport non-administrative B2B user responsibility and roles. It is not active by default; you must enable it.

These two default enrollments give these users permission to access Oracle iStore and Oracle iSupport as regular business users. By default, these users require approval by a primary user within their company.

- **Primary business users (primary B2B users):** Typically, primary users are associated to the default Oracle iStore and Oracle iSupport B2B primary user responsibilities and roles, via the following enrollments:
 - **iStore (Primary User)** --- This enrollment contains the seeded iStore customer responsibility and the administrative business user role.
 - **Support Site: Primary User** --- This enrollment contains default Oracle iSupport administrative B2B user responsibility and roles. It is not active by default; you must enable it.

These two default enrollments give these users permission to access Oracle iStore and Oracle iSupport as primary users for their companies. By default, these users do not require approval.

- **Oracle Partner Management primary users:** By changing the default user type setup, Oracle Partner Management primary users can be associated to primary B2B Oracle iStore responsibilities and roles via the iStore (Primary User) enrollment. This default enrollment gives these users permission to access the Oracle iStore sites as partner primary users. By default, these users do not require approval.
- **Oracle Partner Management non-primary users:** By changing the default user type setup, Oracle Partner Management non-administrative B2B users can be associated to the non-administrative business user responsibilities and roles via the iStore

(Business User) enrollment. This default enrollment gives these users permission to access the Oracle iStore sites as regular partner users. By default, these users require approval.

Note: Oracle Partner Management user types are not enabled by default. You must enable the user types in the Oracle CRM System Administrator Console. See the chapter, *Integrating Oracle iStore with Oracle Partner Management*, page 27-1, the online help available in the CRM System Administration Console, and the *Oracle Partner Management Implementation Guide* for details.

- **Any custom user types:** See the custom user types setup information in the "Ensuring Proper Dependency Setup for User Management" section within this chapter

See this chapter's "User Type Registration Selections" section for details about the seeded Oracle iStore registration page.

Support for URL Parameters

Oracle iStore supports placing URL parameters appended to page URLs. For example, implementers can append the Oracle iSupport application ID to the end of the application entry page, `ibeCZzpEntry.jsp`.

```
ibeCZzpEntry.jsp?go=reg&app_id=672
```

Following are the supported parameters and their impact on functionality:

- **app_id:** This parameter tells the system which application the registration page is associated to.
- **cancel_url:** This parameter, if present along with `app_id`, causes a Cancel button to be displayed in the registration page.
- **bpage:** For iSupport integration, this parameter displays the bottom portion of the registration page.
- **mpage:** For iSupport integration, this parameter displays the top portion of the registration page.
- **ref:** This parameter determines the target page after registration. For example, if a guest user has created a cart and attempts to check out, the `ref` parameter can specify that the Billing and Shipping page URL be the next page the user is taken to after registering. If the `ref` parameter is not provided, then iStore takes the user to the Site Selection Page directly after registration.

E-Mail Notifications Support

Leveraging integration with Oracle Workflow, the Oracle iStore registration framework supports several notification events which inform users via e-mail of registration

events. If integrating with Oracle iSupport and/or Oracle Partner Management, the system substitutes specific Oracle CRM user management notifications for the iStore notifications. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for details.

Preservation of Application Context

The following application context benefits are provided to users of integrating applications:

- Ability to keep the application context when registering and logging in from an application
- Ability to select the application context when registering and logging in from a generic Web site or login page

See the chapter, *Implementing Site Management*, page 5-1, for more information.

Deep Linking Support

Deep linking from external web sites to the registration page is supported. See the deep linking information in the chapter, *Advanced Display*, page 36-1, for more information.

Support for Single Sign-On

See the chapter, *Integrating Oracle iStore with Oracle Single Sign-On*, page 32-1.

Ensuring Proper Dependency Setup for User Management

The Oracle iStore user management framework leverages the Oracle CRM Technology Foundation user management framework through the Oracle CRM System Administration Console. Therefore, you must ensure that the technology stack is properly set up before beginning user management operations. Follow the steps in the *Oracle E-Business Suite CRM System Administrator's Guide*, to set up Oracle CRM Technology Foundation (or see the online help available through the System Administration Console). Also perform the setups listed in the chapter, *Verify Mandatory Dependencies*, page 2-1, and the remaining sections within this section, if your business requirements dictate.

Setting up User Registration

Customer registration for users of Oracle iStore's Customer UI is enabled by default -- however, Oracle Applications requires that the guest user password profile option be set, as outlined below. All of the other steps are optional.

Guest User Password Profile

Oracle Applications requires that the guest user password profile option be set. For Oracle iStore functionality, if this profile is not set at site level, user registration will fail. Therefore, set the profile, GUEST_USER_PWD, at site level. The value should be the username/password of a valid applications user account. It is recommended that this account is not assigned any actual responsibilities, but assigning IBE_CUSTOMER responsibility is required so that iStore can display the catalog for guest users.

Default Roles and Responsibilities

The default roles and responsibilities awarded to users who register through Oracle iStore's Customer UI are controlled through the user type definitions in the Oracle CRM System Administrator Console. For more information, see this chapter's sections: "User Type Support Across Applications", "Registering Using Oracle iStore", and "User Types Overview". Also refer to the appendix, Seeded User Data, page B-1.

Sign-On Profile Options

Be sure to check the values of the following Oracle CRM user management profile options:

1. Signon Password Length
2. Signon Hard to Guess
3. Signon Password Custom

These profile options can affect the restrictions that apply when users initially enter password and username information during registration.

Default Language Preference for E-Mail Notifications

A user's default language preference for e-mail notifications is set from the user's session language during registration. The user can change this default setting in the Profile, Preferences page. See the "Personal Profile Pages" section later in this chapter for more information.

Ensure Setup of Default Customer Profile Class

In order for Oracle iStore registration processes to work properly, the Customer profile class, "Default", needs to be in Active status. Setting this class to an Inactive will cause Oracle iStore registration to fail. Customer profile classes are set up in Oracle Accounts Receivable.

Additional Setup Steps

Several additional setups may be required, depending on your implementation. See the

following sections within this chapter for more information:

- "Registering Using Oracle iStore"
- "Oracle iStore User Types"
- "User Types for Integrating Applications"
- "Managing Business Users with Oracle iStore"

Setting up Integrating Applications

In addition to the information found in this chapter, if integrating with Oracle iSupport or Oracle Partner Management, see the chapters, *Integrating Oracle iStore with Oracle iSupport*, page 25-1, and *Integrating Oracle iStore with Oracle Partner Management*, page 27-1, for specific user management information related to these applications.

See the appendix, *Seeded User Data*, page B-1, for more information regarding user type definitions seeded in Oracle CRM Technology Foundation.

Setting up Account Creation

For users registering through Oracle iStore, a financial account is automatically created for them upon approval if the profile option, JTA: User Management: Automatic Account Creation, is set to Yes at site level. This is the default setting for this profile option. It is recommended that you leave this profile option set to Yes. If set to No, no account will be created for users upon approval, and thus newly approved users will not be able to log in to the Customer UI.

Note: By default, this profile option is No at Oracle iSupport application level, as users created through iSupport need not have a financial account.

In the event a user's registration is approved without an account number being assigned to him, a primary user or the system administrator can assign accounts after approval. See the section, "Account Assignment After Approval", for more information.

Setting up Approval Definitions

Oracle iStore supports the ability to launch approval processes for enrollments for its users. Enrollments and approval processes are defined in the Oracle CRM System Administration Console.

If a user registers, and the selected user type is associated to an enrollment that requires approval, a primary user needs to approve the enrollment request. Once the enrollment request is approved, the user can be assigned to the corresponding responsibility.

Note: Only after the user type registration request is approved are the pending enrollment requests shown to the primary user.

For information about seeded user data, see the appendix, *Seeded User Data*, page B-1

Changing Default Approval Setup

By default, the Oracle CRM System Administrator is the only user registration approver. It is recommended that you change the seeded approval process so that a primary user or users approve other B2B users within their organizations. See the online help available through the System Administration Console for more information.

In addition, as a best practice, set up an approval group to monitor and approve user registration requests. See the section, "Best Practice: Set up Approval Group", in this chapter, for more information.

See also: the sections, "Explicitly Approving B2B Users" and "Approval of Self-Registered B2B Users"

Best Practice: Set up Approval Group

Business users can be approved by:

- Designated primary user of the company
- Any primary user of the company
- Multiple primary approvers of the company, set up in a hierarchical order
- System Administrator in Oracle CRM Technology Foundation

As a best practice, it is recommended that you set up an approval group structure for user registration approvals. In an approval group, several primary users can be designated as approvers who view all of the pending approvals in the same approval queue. Following are high-level steps for setting up the approval group structure:

1. Set up an approval group.
2. Create a dummy user and set the approval group profile to point to the dummy user.
3. Make the dummy user the approver for a single organization or for all of the organizations registered as customers of a Web site.

When setting up approvers for any of the Oracle iStore user types (including Oracle iSupport and Oracle Partner Management users), ensure that the FND users who have been chosen as approvers have been assigned the Oracle iStore Primary User permissions. These permissions enable approvers to access the Pending Approval page in the Oracle iStore user management pages. For a list of these permissions, refer to the appendix, Seeded User Data, page B-1.

See the online help available through the System Administration Console for more information.

Set up Single Approver

If business requirements dictate that you have a single primary user as the sole approval for an organization, you may use the following high-level steps to accomplish this setup:

1. In Oracle Forms as system administrator, create a new user (for example, create a user named DUMMYAPPROVER). Ensure that the user has been given a valid e-mail address.
2. Set profile option, JTF_PRIMARY_USER, to the username (for example, DUMMYAPPROVER) at site level.
3. In the Oracle CRM user management module, add the JTF_APPROVER role to DUMMYAPPROVER user.
4. In the Oracle CRM user management module, update the JTF User Approval approval definition to use the newly created user (for example, DUMMYAPPROVER) as the default and only approver.

For more information on setting up user approvals, see the *Oracle E-Business Suite Security Guide*.

Notifications for Approvals

E-mail notifications are automatically sent for approved or rejected user registrations. Primary users receive a notification indicating that a new user has registered in the system and has requested access. Additionally, a notification is sent to the new user to confirm that the registration is complete, but an approval is required. See the section, "Ensuring Proper Dependency Setup for User Management", within this chapter, for more information.

Setting up E-Mail Notifications for User Management

For e-mail notifications to function, you must integrate with and properly set up Oracle Workflow. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for Oracle iStore-specific information on this application. You also must set several notification-related profile options listed below.

Oracle CRM Technology Stack Notifications Profile Options

You must set the Oracle CRM Technology Foundation user management profile options. The following steps summarize the Oracle CRM Technology Foundation profile options that affect Oracle iStore's registration e-mail notifications functionality. Note that this section contains limited, Oracle iStore-specific information on these profile options.

1. **JTA UM Application URL (JTA_UM_APPL_URL):** This profile option provides

the name of the Oracle iStore application entry JSP, `ibeCZzpHome.jsp`, in the welcome notification sent to newly approved customers. Set this profile as follows: `JSP:OA_HTML/ibeCZzpHome.jsp`. Set the profile at iStore application level. The value is null by default, and a site-level takes precedence if application level is not set. Note that implementers may need to replace `OA_HTML/` with the virtual directory mapped to the JSP file location.

2. **JTF_UM_APPROVAL_URL:** This profile is used to display a link in the Oracle CRM Technology Foundation's registration approval e-mail notification sent to registration approvers. When an approver clicks on the link in the e-mail, after login, he is taken directly to the Pending Approval screen in Oracle iStore. Set this profile option at iStore application level to the approval login page URL, `JSP:OA_HTML/ibeCAcdLogin.jsp?ref=ibeCUmdPApproval.jsp`. Note that implementers may need to replace `OA_HTML/` with the virtual directory mapped to the JSP file location. Implementers integrating Oracle iStore with other Oracle applications using iStore registration flow should set the profile at the appropriate product's application level as well. For example, implementers integrating with Oracle iSupport would set the profile at iSupport application level to the above JSP value. The Oracle iStore JSP, `ibeCUmdPApproval.jsp`, is by default mapped to display template, `STORE_UM_PENDING_APPROVAL_SUMMARY_D` (which is the Pending Approvals page). Implementers who have customized this display template to point to a different JSP should provide that JSP name (in place of `ibeCUmdPApproval.jsp`) in the `JTF_UM_APPROVAL_URL` profile option.
3. **JTF_UM_MERCHANT_NAME:** Set to the name of the company owning the system. This will be used in the e-mails sent out to notify customers of approval/rejection.
4. **JTA: Support Contact (JTA_UM_SUPPORT_CONTACT):** Set to the name of the support contact who can be contacted by users upon registration.
5. **JTA: Sender of the email (JTA_UM_SENDER):** Set to the sender of the e-mail received by users after registration; for example, set it to your company name.
6. **JTF_UM_APPROVAL_TIMEOUT_MINS:** Determines the time-out in minutes used by the JTF Approval workflow before a reminder is sent to an approver or the request is rerouted to the next approver. Zero (0) means it never times out.
7. **JTF_PRIMARY_USER:** Set this profile option to the value of the username which will be the universal primary approver.

Setting up Enrollments

An enrollment is a set of add-on services that users can receive during or after registration. The purpose of an enrollment is to associate with new registrants the required responsibilities, roles, enrollment approval definitions, or enrollment

registration templates determined by your business needs.

Each enrollment can be associated to:

- Enrollment Key, Name and Description
- Responsibility
- Roles
- Application
- Approval processes for this enrollment
- Registration template for this enrollment (not supported by iStore)
- Delegation Role (not supported by iStore)

Oracle iStore supports both automatic (implicit) and explicit enrollments. Self-Service, Delegation and Self-Service-Delegation application modes are not supported.

For more information, refer to the online help available through the System Administrator Console.

Setting up Custom User Types

You can create custom user types using the Oracle CRM System Administration Console and assign the user types to roles, responsibility, and enrollments. During setup, you must associate a registration template to the user type. Further, if you create a new registration template handler, it must be coded per Oracle iStore coding guidelines. (You must refer to several seeded registration templates. Refer to Oracle. apps.ibe.um.RegisterIndividual.java used in the template, IBE_INDIVIDUAL.)

Example

Create Custom User Type

This example creates a "Custom Business Registration" similar to *Register as user of an existing organization*.

1. Create a new template, for example, CUSTOM_BUSINESS, with the following attributes:
 - Template Key --- CUSTOM_BUSINESS
 - Template Type --- USERTYPE TEMPLATE
 - Template Handler --- Create a new template handler, similar to oracle.apps.ibe.um.RegisterBusiness.java. Further, any additional custom processing can also be done here.

- Template Name --- For example, "iStore Custom Business User"
 - Page Name --- `ibeCZzpGetTemplateFile.jsp?tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_CREATE_CUSTOM_D` where, `STORE_REG_CREATE_CUSTOM_D` is the programmatic access name for the registration Display Template, which is mapped to the custom registration display JSP page, coded as per requirements.
 - Sample code --- `ibeCRgdBusinessCreate.jsp`. Similarly, the corresponding processing page also needs to be coded. Note: iStore coding guidelines need to be followed, similar to the sample code provided.
 - Application --- iStore
 - Description --- Used to register users for existing organization (custom handler)
2. Create a new user type, for example, `IBE_CUSTOM_BUSINESS` (similar to `IBE_BUSINESS`), with the following attributes:
 - User Type Key --- `IBE_CUSTOM_BUSINESS`
 - Registration Template --- iStore Custom Business User. Here, associate the new, custom registration template created above.
 - Application --- iStore
 - Approval by --- Select either *No approval is required*, if the users registered through this user type need not go through an approval process, or select from the approval processes available.
 - Enable self service registration --- Uncheck this option.

Assign the desired application roles and enrollments to this user type. Assigning the user type to a responsibility is not mandatory.

3. Set the user type as Active, and it will automatically appear in the iStore registration page without any customization.
4. Implementers can also set up e-mail notification configurations for custom user types. For more information, see the section, "Mapping New Notification Configurations", in the chapter, Integrating Oracle iStore with Oracle Workflow, page 34-1.

Depending upon whether approval is enabled/disabled for the user type, the following FND messages would be used:

- Approval enabled --- `IBE_APPRVL_REQD_CUST`

- Approval disabled --- IBE_APPRVL_NOT_REQD_CUST

Note the above FND messages are used for all custom user types exposed through iStore.

5. Any custom user types should also be added to the appropriate user type lookup (i.e., to IBE_UM_PRIMARY_USER_TYPES or to IBE_UM_SECONDARY_USER_TYPES). If the custom user types are not present in the applicable lookups, the registration handler will fail to distinguish the user types. Note that the same registration handler is used for both primary and non-administrative (secondary) B2B user types. For details about the lookups, see the section, "User Type Lookups", in the chapter, Implementing Messages and Prompts, page 16-1.

User Types Overview

User type definitions are stored and maintained through the Oracle CRM User Management Framework. In general, each user type is tied to an Oracle Applications responsibility. The default responsibility for the Oracle iStore Customer Application is IBE_CUSTOMER.

Roles can be awarded on top of the responsibilities to further control access to the HTML applications. Each HTML application usually has its own set of users within these basic user types.

For additional information, see:

- "User Type Support Across Applications"
- "Oracle iStore User Types"
- "Site Management User Type Definitions" in the appendix, Seeded User Data, page B-1

Each user type in the CRM User Management Framework is associated to:

- User type name, with corresponding key and description
- Default application (Oracle iStore)
- User type registration template that defines the registration flow
- Approval process
- Default role(s) and responsibility

In addition, for every user type, there is a long name and a short name shown in the Oracle CRM System Administration Console. The long name displays in the Oracle iStore user type Registration listing page, and the short name displays in the Oracle

iStore Pending Approval screens.

For a list of how the user types map to the links in the user type listing Registration page, see the "Site Management User Type Definitions" section in the appendix, Seeded User Data, page B-1.

Oracle iStore User Types

In addition to the administrative users described in the chapter, Implementation Tasks for Oracle iStore, page 4-1, Oracle iStore also supports the following customer user types:

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

Guest Users

Oracle iStore guest users (also called *walk-in* users) can browse Customer UI catalogs and create shopping carts. However, they cannot:

- Set up a user profile
- Save a shopping cart
- Share a shopping cart
- Create a shopping list
- Submit an order
- Search or view order details

Walk-in users who visit your specialty sites are automatically logged in with the guest user name. If a guest user makes any changes, such as modifying the preferred language or currency, or adding items to the shopping cart, the changes are saved in the cookie so that different guest users cannot see each other's changes.

See the chapter, Implementation Tasks for Oracle iStore, page 4-1, for details on how to implement guest user access.

B2C Users

Registered business-to-consumer (B2C) users are individual customers not associated with a company. By default in Oracle iStore, B2C users do not require approval; they are always approved automatically -- however, you can use the Oracle CRM System Administrator Console to set up B2C users to require approval.

Unlike B2B users, for B2C users, out-of-the box you cannot assign roles.

B2B Users

Business-to-business (B2B) non-administrative users represent companies whose information is stored in Oracle Trading Community Architecture (TCA). Typically, when non-primary B2B users self-register, they enter a Registry ID created when the first user from that company (the primary user) registered. All B2B user information is stored in the Oracle TCA schema.

Non-administrative B2B users are awarded the business user role by default. See the "Business User Role Seeded Permissions" section in the appendix, Seeded User Data, page B-1, for a list of permissions seeded within the Oracle iStore business user role.

Primary Users

Primary users are B2B users who are responsible for creating and managing other users within their companies. Typically, the first user who registers his company in Oracle iStore is considered the primary user. When a primary user registers his organization for the first time, a Registry ID (Organization ID), a primary company financial account, and a primary company address are created in Oracle TCA. This first financial account for the company cannot be changed by the primary user. Subsequent users from the company should use the Registry ID when registering, in order to be associated to the company in Oracle TCA.

See this chapter's "Managing Business Users with Oracle iStore" section and the "Primary User Role Seeded Permissions" section within the appendix, Seeded User Data, page B-1, for more information about the abilities of these users.

Reseller Users

The seeded IBE_RESELLER_ROLE is appropriate to assign to users who sell your products but are not internal to your company. If you are integrating with Oracle Quoting, Reseller Users can create shopping carts, but cannot view all customer accounts in your records, bill to anyone other than the sold-to customer, or sell to customers who are not in your records.

User Types for Integrating Applications

Oracle iStore supplies several user types in the Oracle CRM user management

framework. See this chapter's "User Type Support Across Applications" section and the "Site Management User Type Definitions" section within the appendix, Seeded User Data, page B-1, for details.

Registering Using Oracle iStore

When registering through Oracle iStore, to begin registering, users can select:

- The Register icon at the top right of the Site Selection Page or Site Home Page
- The Register link in the Welcome Bin

Users must complete the required information, and are either immediately approved or must wait for approval before accessing the Customer Application, depending upon the approval mechanisms implemented.

Implementers can specify the landing page that occurs after registration by inserting the "ref" parameter in the URL. See the "Support for URL Parameters" section within this chapter for more information.

Following registration, administrative B2B -- known as *primary users* -- can fulfill user management functions for their companies in Oracle iStore's Customer UI. These functions can include: approving users, creating new users, assigning accounts, resetting passwords, and awarding and managing user roles.

Additional Information: Implementers can disable the ability for primary users to create other users by setting a profile option, APPS_SSO_USER_CREATE_UPDATE, to Disabled. See the section, "Ability to Disable User Creation", below, for more information.

Behavior When Users Get Rejected

When a user's registration request is submitted, the username entered is created in Reserved status in the Oracle Technology Foundation table (FND_USER table). Only upon approval is the username enabled in the system. If the approval is rejected, the username is released and all details of the contact are inactivated. The username is removed from the system and can be re-used by this or another user. Also, since the contact is inactive, it is not selectable to be the sold-to, bill-to, or ship-to contact by any other user, nor by sales representatives.

In addition to the above noted behavior, the system sets rejected users' Oracle TCA data to inactive. If the user is a business contact of an existing B2B organization, the party of type, contact, associated with the user is set to inactive status. If the user is the primary user of a new, registered company, both parties – organization and contact – are set to inactive, as long as there is no other contact associated to the organization. If the user is a B2C customer and is registering for the first time, the new party of type, person, is set to inactive status. Following are the specific records that are inactivated for the two

main user types (B2B and B2C):

- **B2B User:**
 - Organization record (only if there is no other active contact/employee of this organization)
 - Person record
 - Party relationship record
 - Party site record
 - Contact points (address, phone, e-mail)
 - Preference record
- **B2C User:**
 - Person record
 - User contact points (phone, e-Mail)
 - User preferences

The following are exceptions to the above rules:

- When a user gets created from Central Account Provisioning system (CAPs) registration page, an FND_USER record always get created in Active status, and hence, upon rejection, TCA data will not be inactivated.
- When a user gets created via the Online Access to Existing Account functionality, his TCA data is never set to inactive, since the user already has valid transactions in the system.
- When an incomplete user completes Partial Registration using a user type requiring approval, and his request is rejected by a primary user, his username is not released (as it would have already been active), and also his TCA contact details are not inactivated.

If the implementation requires that a user's TCA data never gets flagged as inactive, disable the subscription with IBE_JTA_INTEGRATION_GRP.postRejection as the function name. Use the following steps:

1. Log into Oracle Self Service Web Applications as system administrator and select the responsibility, Workflow Administrator Web Applications.
2. Navigate to Business Events and then select Events.

3. Search for the event, oracle.apps.jtf.um.rejectUTEvent.
4. For the above event, select Subscription.
5. Update the subscription with IBE_JTA_INTEGRATION_GRP.postRejection as the function name.
6. Change the status to Disabled and save the changes.

Check Username Availability

When a user registers through Oracle iStore, the system automatically checks, before registering the username, whether the username is already in use in Oracle CRM Technology Foundation (FND_USER table), Oracle Internet Directory (OID), and any other third-party application. Following is the behavior during the checks:

- During self-service registration, if the username is already in use, the system displays a "username already used" message to the user.
- During delegated user creation (e.g., when a primary user is creating another user), if the username already exists in OID, but not in FND, the registration is allowed to be completed, as long as the profile option, Link Applications user with OID user with same username, is turned on. In this case, the system creates the username in FND and links the username to the OID username. If this re-linking profile option is off, and if the user exists in FND, the system displays the "username already used" message.
- If integration with Oracle Single Sign-On Server is turned off, the system only checks the FND_USER table for the presence of the username.

The following table further illustrates the behavior.

Check Username Behavior

	Username Not in FND or OID	Username in FND and OID	Username in FND But Not in OID	Username in OID But Not in FND	Username in OID But Not in FND
				Re-linking Not Allowed	Re-linking Allowed
Self-Registration	Username creation allowed; username created in FND and propagated to OID	"Username already used" error message is shown	"Username already used" error message is shown	"Username already used" error message is shown	"Username already used" error message is shown
Delegated User Management	Username creation allowed; username created in FND and propagated to OID	"Username already used" error message is shown	"Username already used" error message is shown	"Username already used" error message is shown	Username creation allowed

User Type Registration Selections

The user type selection Registration page groups users into three main types:

- Individual (B2C)
- Business (B2B)
- Oracle Partner Management (Partners)

An additional group, titled *Others*, displays for user types that do not match any of the above categories. This scenario may occur when a new iStore user type is introduced that is not included in any of the existing lookups that categorize the user types; in this case, the Others group automatically appears in the user type listing page, and the new user type is shown under that group.

The grouping for the three main types is achieved using the following user type lookups:

- IBE_UM_INDIVIDUAL_USER_TYPES, for B2C users

- IBE_UM_STORE_USER_TYPES, for B2B users
- IBE_UM_PARTNER_USER_TYPES, for Partner users

Each of the lookups shown above contains additional lookups (child lookups) that enable the specific registration links for the different user types. For example, the IBE_UM_STORE_USER_TYPES lookup contains child lookups for primary, non-administrative B2B, and Need Online Access users. The codes of the child lookups match the user type keys present in Oracle CRM user management module. The standard user types are enabled by default. To enable an additional user type, enable the user type in the Oracle CRM Technology Foundation System Administrator's Console.

For a list of the child lookups within each user type lookup, see the chapter, *Implementing Messages and Prompts*, page 16-1.

Additional Information: While displaying the registration user type listing page, if the system returns only one user type, then the user will be directly taken to the registration page for that user type.

Following is the business flow for users selecting a user type in the registration page:

1. The user accesses the Registration page using one of the methods described in the section, "Registering Using Oracle iStore", above.
2. In the Registration page, users select one of the following hyperlinks (which map to the user types lookups and to user types in the Oracle CRM user management module):
 - *Register as individual* --- This link is for registering B2C users.
 - *Register your company* --- This link is for registering a company for the first time. Note that this registers a primary user for the first time. An Organization ID (Registry ID) is created. When the primary user registers his company, the company is registered as a customer of the site where he registers, and the user is created as the primary user for that organization.
 - *Register as a user of an existing company* --- This link is for registering a non-administrative B2B user whose company has already been registered.
 - *Register as a partner* --- This link is for registering an Oracle Partner Management application company that will be accessing Oracle iStore's site management functionality.
 - *Register as a user of an existing partner* --- This link is for registering a partner business user (a user affiliated with the Oracle Partner Management application) whose company has already been registered.

Also note the following:

- Additional links are available if Online Access to Existing Account has been enabled. Different links also display depending upon whether Partial Registration is invoked. See the sections, "Online Access to Existing Account" and "Partial Registration", below, for more information.
- The partner links are not enabled by default. Implementers only set up the Oracle Partner Management links if integrating with Oracle Partner Management. See the Integrating Oracle iStore with Oracle Partner Management, page 27-1, chapter for more information.
- For a list of the e-mail notifications sent with user registration for the various user types, see the chapter, Integrating Oracle iStore with Oracle Workflow, page 34-1.
- Depending upon the type of registration selected and whether your implementation supports integration with Oracle SSO Server, Oracle iSupport and/or Oracle Partner Management, several other flows are possible. See the following chapters for more information:
 - Customer Application Process Flows, page 37-1 ("Sample User Registration Flows" section)
 - Integrating Oracle iStore with Oracle iSupport, page 25-1
 - Integrating Oracle iStore with Oracle Partner Management, page 27-1
 - Integrating Oracle iStore with Oracle Single Sign-On, page 32-1

The following figure shows an example of how the Registration page might look in an implementation of Oracle iStore.

Oracle iStore Registration Page Example

Registration

Please select one of the following options and complete the registration forms

Individual

- ▶ [Register as individual](#)
- ▶ [Need online access to your existing individual account?](#)

Company

- ▶ [Register your company](#)
- ▶ [Register as a user of an existing company](#)
- ▶ [Need online access to your existing corporate account?](#)

Partner

- ▶ [Register as a partner](#)
- ▶ [Register as a user of an existing partner](#)

Note: The above page is shown only when the implementation is not using a Central Access Provisioning system (CAPs). If CAPs is enabled, a different page is shown. See the chapter, *Integrating Oracle iStore with Oracle Single Sign-On*, page 32-1, for more information.

Remember that the Partner registration links are inactive by default. You must activate these user types in the Oracle CRM System Administration Console. See the chapter, *Integrating Oracle iStore with Oracle Partner Management*, page 27-1, and the *Oracle Partner Management Implementation Guide* for more information.

User Types Listing Page Use Cases

The following use cases can aid your understanding of the Registration page behavior under various conditions. These use cases assume at least one Online Access to Existing Account user type is enabled.

Use Case 1

In this scenario, Oracle iStore is integrated with Oracle Single Sign-On Server (SSO), CAPs is disabled, and user creation/update is allowed. Since CAPs is disabled, the user type registration selection page will display all existing user types, grouped under the user type groups.

Use Case 2

In this scenario, Oracle iStore is integrated with Oracle Single Sign-On Server (SSO), CAPs is enabled, and user creation/update is not allowed. Since CAPs is enabled, the user type registration selection page will display the following:

- A New User section with the link, Register as a new user
- An Existing User section, with the following Online Access to Existing Account links:
 - Individual Link: Need online access to your existing individual account?
 - Company Link: Need online access to your existing corporate account?

Note that if the Online Access to Existing Account user types are disabled, the system will direct the user to the CAPs registration form.

Selective Display of User Type Links

You can set up the Registration user types listing page to show only a subset of the available user types. You can set up a site-specific user type listing or set up a deep link to a specific user type(s) registration from an external page. This functionality is achieved by using the parameter, `group_ut`.

Site-Specific Setup

To set up a site-specific link scenario, map the JSP, `ibeCRgdRegContainer.jsp` (the registration listing page), appended with the parameter, `group_ut=<list of comma separated user type keys>`, to the Display Template, `STORE_REG_CONTAINER_D`.

Example: The implementer has added a template mapping for the Display Template, `STORE_REG_CONTAINER_D`, which is the user type Registration listing page. The template has the following URL mapped to a Oracle Partner Management specialty site:

```
ibeCRgdRegContainer.jsp?group_ut=IBE_PARTNER_BUSINESS:  
IBE_PARTNER_PRIMARY
```

With this setup, when a user selects that Partner specialty site and then selects the Register link within the specialty site, the system will show only the enabled Partner user types in the Registration page.

Deep Link Setup

To set up a deep link to a specific user type(s), create the deep link in the external site, as in the following example:

```
http://<host>:<port>/OA_HTML/ibeCAcpSSOReg.jsp?  
a=b&group_ut=IBE_PARTNER_PRIMARY:IBE_INDIVIDUAL
```

In the above example, the Registration page would only show the *Register as Individual* and *Register as a partner* listings (grouped, of course, into the Individual and Partner areas).

Also note the following:

- If only one user type is enabled, or if group_ut has a known, enabled iStore user type key, the system will auto-direct the user to the user type registration form of the specified user type key.
- If no user type is enabled, or if group_ut has a user type not present in the enabled user type list, the system shows an appropriate error message.

User Registration Information Entry Pages

This section discusses the user registration pages available with standard registration.

Individual User Registration Page

The individual user (B2C) registration page is available by selecting the *Register as individual* hyperlink on the Registration page. It includes the following data entry fields:

- **Name:** Fields are present for first, middle, and last names.
- **E-Mail Address:** The system validates the format of the e-mail address entered.
- **Telephone/Fax Numbers:** Fields are present for business and personal phone numbers as well as fax number. Country code is supported in the user interface also.
- **Username:** The system checks whether a duplicate (active) username exists, and if so, the user is prompted to enter a different username.
- **Password:** Fields are present for entering and re-entering a password.
- **Opt-in/Opt-out of Marketing:** The checkbox field, *Please send me e-mail about special offers and products.*, captures the user's preference in terms of receiving marketing materials via e-mail. The checkbox is un-checked by default.

The B2C user is not required to enter address information to register.

Primary Business User Registration Page

The user registration page for primary (administrative) business users is available by selecting the *Register your company* hyperlink on the Registration page. It includes the following data entry fields:

- **Business Information Section:**
 - **Company Name** --- This information becomes the company (organization) name in Oracle TCA. After registration is submitted, Oracle TCA creates a Registry ID for the organization which subsequent (non-administrative) users

then use during registration.

- **Country** --- This field is a list-of-values showing all countries defined in Oracle TCA.
- **Address** --- Four lines are provided for street address, plus fields for City, State, County, and Zip code.
- **Telephone/Fax Numbers** --- Fields are present for company phone number and fax number. Country code is supported in the user interface also.
- **Personal Information Section:** This section contains the same fields as the Individual user registration page.

Non-Administrative Business User Registration Page

The user registration page for non-administrative business users is available by selecting the *Register as a user of an existing company* hyperlink on the Registration page. It includes the following data entry fields:

- **Business Information Section:** This section includes only one field, for Registry ID (organization ID).
- **Personal Information Section:** This section contains the same fields as the Personal Information section on the primary user registration page.

Non-administrative business users are not required to enter address data, since the company address is related to them in Oracle TCA.

Additional Information Common to Registration Pages

Note the following additional details common to the registration pages:

- You can mandate the entry of a business telephone number in the registration pages by setting the profile, IBE: Mandate Contact Business Phone, to Yes. See the appendix, Profile Options, page A-1, for more information on the profile option settings.
- In the telephone fields, Country Code is validated against the country codes present in the phone_country_code in the HZ_PHONE_COUNTRY_CODES table.
- By default, when a user selects the Cancel button in a Registration page, the system takes the user to the Site Home Page (if site context is available) or to the Site Selection Page. However, if the cancel_url parameter is provided, then selecting Cancel takes the user to the URL specified. Additionally, if the app_id parameter is provided (for example, during Oracle iSupport registration flows), the Cancel button only displays if the cancel_url parameter is provided.

Online Access to Existing Account

Merchants have the ability to offer Customer Application access to customers who already have placed an order with them through a selling channel other than Oracle iStore (e.g., through a call center). This functionality, known as Online Access to Existing Account, lets customers register for access to Oracle iStore site(s) without the need to duplicate existing accounts. Since these customers have a pre-existing business relationship with the merchant, they generally already have a financial account in Oracle TCA which Oracle iStore can use to recognize and validate them. Once registered, these customers have full access to the sites; they can place orders and view the progress of orders (even if placed through another channel).

Business Process Flow

Following is the business process flow:

1. A B2C or B2B customer has placed an order with the merchant company through some other avenue than Oracle iStore.
2. The customer navigates to the Oracle iStore Customer Application in order to view the status of his order or other relevant order information.
3. Oracle iStore displays the standard user type selection page which displays additional links for Online Access to Existing Account for B2B and B2C users. The customer selects one of the links, depending upon the user type he wishes to register as.
4. Oracle iStore displays the Online Access to Existing Account registration page that maps to the user type selected. The customer enters information which validates him as an existing customer (see the section, "User Interface Details", below, for more information). If the user is unable to enter the required information, he will not be allowed to proceed with the online access request.
5. The user enters the required information and submits the request, which is validated and treated as follows:
 - B2C User Data Validation: The system validates the following: (1) Whether the account number is not already associated with an existing user account; (2) Whether the zip code provided is a valid billing zip code associated to the account and was used in any previously placed order; (3) Whether the phone number provided is associated with the account number; and (4) Whether the username is unique and the password valid. If any of these items cannot be validated, the system displays an error message and returns the user to the registration page.
 - B2B User Data Validation: The system validates the following: (1) Whether the account number is valid and belongs to a B2B organization, and the order was

placed using the account number entered; (2) Whether the contact, who is the sold-to contact in the order, is already associated with an existing user record; (3) Whether the order date matches the order number entered; and (4) Whether the username is unique and the password valid. If any of these items cannot be validated, the system displays an error message and returns the user to the registration page. Note that for order date, the system will perform a search between one day before and one day after the order date entered by the user.

- Username Validation for B2C: If the username is already active, the following error message is displayed: "The account information provided already has an online username. Please login." If the username is inactive, the following error message is displayed: "Your online account has been inactivated. Please contact the System Administrator to activate it."
 - Username Validation for B2B: If approval status is not Rejected and the existing username is active, the following error message is displayed: "The account information provided already has an online username. Please login." If approval status is not Rejected and the existing username is inactive, the following error message is displayed: "You already have a user account. Please contact the System Administrator or the Primary User of your organization to activate it." If the approval status is Rejected, the user can register using a different username.
 - E-Mail Address Treatment: If the e-mail address entered is not the primary e-mail address stored for the user, the system marks the newly entered e-mail address as the primary e-mail address. The system retains the demoted e-mail address.
 - Inactive User Treatment: If a B2B user is found to already exist but is inactive, he is shown a message telling him to contact the primary user of his organization. If a B2C user is found to already exist in the system but is inactive, he is shown a message telling him to contact the system administrator.
6. If no registration approval is required, the user is logged in and shown the Customer Application default landing page. Oracle iStore sends a registration confirmation e-mail to the customer (see the chapter, Integrating Oracle iStore with Oracle Workflow, page 34-1, for e-mail notification details). If approval is required, the customer is shown a confirmation page and will need his registration approved before accessing the application, following standard user registration functionality.
 7. Since the candidate already possesses a financial account, the system does not create a new financial account for Online Access to Existing Account registrations.

Additional Information: Usernames created through Online Access to

Existing Account functionality are associated to sold-to contacts only.

User Interface Details

When Online Access to Existing Account functionality is enabled, the user type selection page displays two additional links, one under the Individual user section and one under the Company section. Following is the wording of the links:

- Individual Link: *Need online access to your existing individual account?*
- Company Link: *Need online access to your existing corporate account?*

Registration Pages

The registration pages are described below.

Note: The validation logic to verify the user's identity can be customized by mapping customized display and processing JSPs to `STORE%PARTIAL%` display template keys, as appropriate. The processing page, after successful validation, must pass the following JSP parameters: username, password, e-mail and contactid, to the forwarded JSP (`jtftmplh.jsp`), where, contactid is the validated party_id of type, person (for B2C), and the validated party_id of type, party_relationship (for B2B).

Individual (B2C) Registration Page

The Registration For Individual Customer page displays after a customer selects the Need Online Access individual link. In this screen, the customer must enter the following information used for validating his customer status:

- **Verify Identity Section:**
 - Account Number --- This is the account number used with the order.
 - Billing Zip Code --- The customer can enter any of the billing zip codes associated with the account number.
 - Business or Home Phone Number --- The customer can enter either his business or home telephone phone number associated with the account number. This should be the active telephone number attached to the party of type person (however, this phone number is not mandatory to place an order through other channels).
- **Create Username Section:**
 - Username --- This field is validated against existing Oracle iStore usernames. If there is a duplicate match, the user is prompted to enter a different username. If the customer is recognized as an existing user, an error message will display.
 - Password/Confirm Password --- The customer enters a unique password.

- E-Mail Address --- The customer enters his e-mail address, which is not validated against any record, but is validated for proper e-mail format.

Company (B2B) Registration Page

The Registration For User of An Existing Company page displays after a customer selects the Need Online Access company link. In this screen, the customer must enter the following information used for validating his customer status:

- **Verify Identity Section:**
 - Account Number --- This is the account number used with the order.
 - Order Number --- The customer must be the sold-to contact on the order.
 - Order Date --- This is the date that the order was placed. Note that when the customer enters a date, system will also search for the order date between previous date and the next date.
- **Create Username Section:**
 - Username --- This field is validated against existing Oracle iStore usernames. If there is a duplicate match, an error message will display. If the customer is recognized as an existing user, an error message will display.
 - Password/Confirm Password --- The customer enters a unique password.
 - E-Mail Address --- The customer enters his e-mail address, which is not validated against any record, but is validated for proper e-mail format.

In each of the screens, the customers are given the option to opt-in/opt-out of marketing materials being sent to them.

User Management Assumptions

With Online Access to Existing Account functionality, the following general user management assumptions are made:

- Online Access to Existing Account is supported for B2C and B2B (including Oracle iSupport) users who have placed an order with the merchant (the B2B user must have placed the order as the sold-to customer).
- Oracle Partner Management users are not candidates for this registration avenue. However, they can register as standard B2B users and then their primary user can add permissions at a later time.
- Out-of-the-box, primary users cannot be registered with Online Access to Existing Account.

- This functionality may not be available under certain conditions if your implementation is utilizing a Centralized Account Provisioning system (CAPs); see the chapter, Integrating Oracle iStore with Oracle Single Sign-On, page 32-1, for more information.
- Oracle iStore lookups determine the grouping and display of Oracle iStore user types (B2C, B2B primary, B2B contact, partner primary, partner contact) in the registration or partial registration screens. The lookup code of these lookups should be mapped to the User Type Key of the Oracle CRM Technology Foundation user types. For a list of the lookups, see the chapter, Implementing Messages and Prompts, page 16-1.
- While displaying the registration user-type listing page, if the system returns only one user type, then the user will be directly taken to the registration page for that user type.

Entities Required for Different User Types

The following table show the entities required for Oracle iStore individual (B2C) user types:

Entities Required for Oracle iStore B2C User Types

Individual User: B2C Entities	Required?	Comments
Active Username	Yes	If username is end-dated, an error will display.
Active Person Party (i.e., an active record in hz_parties table with party_type as 'PERSON')	Yes	If this record does not exist, the user will have to do partial registration. If a party record exists but is inactive, an error message is shown.

Individual User: B2C Entities	Required?	Comments
Record in Oracle CRM Technology Foundation (JTA) registration table (jtf_um_usertype_reg) for this user	Conditional	<p>If the logged-in user has all of the above entities as valid or active, then:</p> <ul style="list-style-type: none"> • If this record does not exist OR the record exists with Approved status (status is approved, and the effective end-date is either blank or set to a future date), the user can complete his login (no partial registration needed). • If this record exists, but is in Rejected status, the user can browse public sites; if he attempts to access a restricted site or a secure page (e.g., Profile or checkout), he will be taken to the partial registration screen, where he will be required to re-confirm his registration information again and re-submit his request to access iStore again.

The following table shows the entities required for Oracle iStore organization (B2B) user types (includes Oracle Partner Management user types):

Entities Required for Oracle iStore B2B User Types

Individual User: B2B Entities	Required?	Comments
Active Username	Yes	If username is end-dated, an error will display.

Individual User: B2B Entities	Required?	Comments
Active B2B related TCA records (i.e., active records in hz_parties, hz_relationship tables, which identify and associate the B2B contact to his organization)	Yes	<ul style="list-style-type: none"> • If any of these records does not exist, the user will have to do partial registration. • If these records exist, but any of them are inactive, an error will display.
Active Oracle TCA Account (i.e., active record in hz_cust_account_roles table for this party)	Yes	If this record does not exist OR exists but is inactive, the user will have to do partial registration.
Record in Oracle CRM Technology Foundation (JTA) registration table (jtf_um_usertype_reg) for this user	Conditional	<p>If the logged-in user has all of the above entities as valid or active, then:</p> <ul style="list-style-type: none"> • If this record does not exist OR the record exists with Approved status (status is approved, and the effective end-date is either blank or set to a future date), the user can complete his login (no partial registration needed). • If this record exists, but is in Rejected status, the user can browse public sites; if he attempts to access a restricted site or a secure page (e.g., Profile or checkout), he will be taken to the partial registration screen, where he will be required to re-confirm his registration information again and re-submit his request to access iStore again.

Individual User: B2B Entities	Required?	Comments
Partner Profile for the Company	Yes	This association is essential for the Organization to be treated as a Partner Company.
Permission PV_PARTNER_USER	Conditional	This permission determines whether the logged-in user is identified as a "partner business user" (if permission assigned) or "B2B business user" (permission not assigned)

Implementing Online Access to Existing Account Functionality

To implement Online Access to Existing Account functionality, you must enable the appropriate user types in the Oracle CRM System Administrator's Console user management module. Following are the user types that must be enabled:

- **IBE_INDIVIDUAL_PARTIAL:** Activating this user type enables the *Need online access to your existing individual account?* link on the Registration page.
- **IBE_BUSINESS_PARTIAL:** Activating this user type enables the *Need online access to your existing corporate account?* link on the Registration page.

For more information on the text lookups that correspond to these user types, see the chapter, *Implementing Messages and Prompts*, page 16-1. For more information on user data, see the appendix, *Seeded User Data*, page B-1. For information on Oracle CRM System Administrator's Console, see the online help available through the System Administrator Console

Note that Online Access to Existing Account functionality is disabled when a Centralized Account Provisioning system (CAPs) is being used and the profile option, **APPS_SSO_USER_CREATE_UPDATE**, is Disabled.

Partial Registration

Partial Registration allows users who are incomplete from an Oracle iStore perspective to complete registration and gain access to the sites. With Partial Registration, users who do not have an account or party associated with them can access Oracle iStore sites after entering some user data and having it validated. These users may have been created through some other avenue integrated with the Oracle E-Business Suite (e.g., through a Central Access Provisioning system used with the Oracle Single Sign-On

Server) and may only have a username associated with them.

Before going through Partial Registration, these users can only perform guest user activities within the Oracle iStore Customer Application (e.g., browse the catalog, add items to the cart); when they attempt to perform some activity that requires login (e.g., check out), they will be shown one of the user types corresponding to their user status. The user then selects the appropriate user type and registers for full access to the Customer Application.

Partial registration can be used in an implementation integrated with the Oracle Single Sign-On (SSO) Server or used in a non-SSO scenario. It is applicable to B2B, B2C, and Partner users.

Partial Registration Process Flow

Following is the process flow for Partial Registration. This flow assumes a Central Access Provisioning system (CAPs) is not being used.

As a prerequisite, a customer has been registered with a username in the Oracle Internet Directory (OID) or Oracle Technology Foundation (FND) tables. Additionally, it is assumed that the user data synchronization Oracle E-Business Suite and OID has been setup appropriately.

1. An authenticated (logged in) user approaches the Oracle iStore Customer application and browses the catalog. He attempts to perform a secure activity, such as checking out.
2. The system checks the user session to gather user information associated with the user, such as whether he is a B2C user, a Partner user, etc.
3. Based on the user information gathered, the system displays the user registration page with the appropriate links showing (see "User Interface Details", below).
4. The user selects one of the user types. The Confirm Registration page displays, with known user data pre-populated into the registration form. The user enters the remaining registration data.
5. The user submits the registration request. If auto-approval is being used, the user is taken to the page he was attempting to access before the system invoked Partial Registration. If his registration requires approval, he is shown the pending approval page and must wait for approval before accessing secure areas of the sites.

If a user's account is later revoked, he will be directed again to the Partial Registration flow.

User Interface Details

When Partial Registration functionality is enabled, the user type selection page displays different user type selection links depending upon the known user data (e.g., which type of party, if any, is associated with the user, or if the user has any Oracle Partner

Management responsibilities). The following table shows the behavior.

Registration User Type Selection Page Behavior with Partial Registration

Known User Data	Link(s) Displayed
User with no party or B2C user	All user type links
B2B user of a B2B company	B2B non-administrative and Partner primary links
B2B user of a Partner company	B2B non-administrative and Partner non-administrative links
Partner user of a Partner company	Partner non-administrative links

Just as with other types of registration, each link on the Partial Registration screen is associated to a specific user type in the Oracle CRM System Administration user management console.

Confirm Registration Screen

With Partial Registration, customers enter their registration data in the Confirm Registration screen.

Partial Registration E-Mail Notification Behavior

The following tables show which content is displayed in the Oracle Workflow e-mail notifications with Partial Registration, when registration is set to either automatic approval or to require approval. The first table is for standard registration; the second and third tables, presented for comparison purposes, are for delegated user creation (e.g., when a primary user creates a user in the iStore user management pages). The last table shows the Partial Registration e-mail information.

Regular Registration with SSO Disabled or Enabled: Username Does Not Exist in OID or FND

Approval	Approval Required Section	Approval Not Required Section	User Credentials Section	User Credentials Section with Username Only
Required	Y	N	Y	N

Approval	Approval Required Section	Approval Not Required Section	User Credentials Section	User Credentials Section with Username Only
Automatic	N	Y	Y	N

Delegated User Creation with SSO Disabled or Enabled: Username Does Not Exist in OID or FND

Approval	Approval Required Section	Approval Not Required Section	User Credentials Section	User Credentials Section with Username Only
Required	Y	N	Y	N
Automatic	N	Y	Y	N

Delegated User Creation with SSO Enabled: Username Exists in OID (username relinked)

Approval	Approval Required Section	Approval Not Required Section	User Credentials Section	User Credentials Section with Username Only
Required	Y	N	N	Y
Automatic	N	Y	N	Y

Partial Registration

Approval	Approval Required Section	Approval Not Required Section	User Credentials Section	User Credentials Section with Username Only
Required	Y	N	N	Y
Automatic	N	Y	N	Y

Implementing Partial Registration

Assuming the user types are enabled in the Oracle CRM System Administration Console, Partial Registration is already set up for use in your sites.

Ability to Disable User Creation

With the existence of a Central Access Provisioning system (CAPs), or for some other business reason, it may not be necessary to allow the creation or updating of users by primary users in the Customer Application. Implementers can disable the ability of primary users to create other users by setting the profile option, APPS_SSO_USER_CREATE_UPDATE, to Disabled. When this profile option is set to Disabled, the following occurs in Oracle iStore:

- If CAPs also is disabled, all registration icons and links are disabled. If CAPs is enabled and APPS_SSO_USER_CREATE_UPDATE is disabled, the registration links are available. Selecting a link takes the user directly to the CAPs registration page.
- In the user management pages, the primary user cannot create a new user in the Create Contact screen
- All user data fields (such as start/end dates and password) are read-only; the primary user cannot update any user data.
- If a user tries to invoke the Registration page by typing a URL or from a deep link, the system will show an error message in all cases except when a CAPs is implemented. If a CAPs is implemented, the system will take the user directly to the CAPs registration page.
- If the Application SSO Login Type is set to SSO and the Application SSO Change Password URL profile is set to the URL of the specified password reset JSP for OID, the Profile icon will link to the central JSP instead of a link to the password JSP. In this case, instead of showing textboxes for password reset in the Profile, Personal Information screen of the Customer Application, iStore displays a link pointed to by the Application SSO Change Password URL profile. Ideally, this is done when SSO is enabled and this profile can point to the OID-DAS URL, as shown in the example below:

```
http://<oid-server-name>:<oid-server-  
port>/oiddas/ui/oracle/ldap/das/mypage/ChgPwdMyPage
```

See the *Oracle CRM System Administrator's Guide* for more information about the profile option.

Logging in Through Oracle iStore

Oracle iStore leverages a common Oracle Technology Foundation login screen where

users can enter their usernames and passwords to access the Customer Application. The Login page is displayed under the following circumstances:

- Registered user selects the Login icon
- Registered or user guest user is prompted to sign in
- Logged in user is prompted to re-authenticate (with re-authentication, no new session created or altered; just the password is checked)

The Login page displays the user name field, a password field, a Login button, a link to the forgot password feature, and a link to the new user registration page.

For information on the forgot password feature, see the "Setting up Self-Service Login Assistance" section within this chapter.

Password Expiration

If a user attempts to log in and his password is expired, the Reset Password screen is launched.

An error message is displayed when the following information is invalid:

- Username is inactive or end-dated
- Password is invalid
- User's account is invalid
- User's organization is invalid or inactivated

Error messages may contain a reference code that the merchant can use to identify the problem.

Opting In/Opting Out

Oracle iStore users can choose whether or not to receive marketing communications based on their registration with Oracle iStore. Users can specify their preference at registration and modify it later in their Profile, Preferences menu.

The opt out state is assumed unless a user explicitly opts in by selecting the *Please send me e-mail about special offers and products* checkbox and saving the preference (updating the page).

Opt in/opt out preferences are stored at the party level (party_id in TCA schema), using the table, HZ_CONTACT_PREFERENCES.

Opt In/Opt Out Checkbox

In Oracle iStore, there are two locations where users can select opt in/opt out

preferences:

- Unregistered user arrives at the Registration page; or,
- Registered user navigates to the Preferences page within the Profile menu

In addition, primary users can update users' marketing opt-in/opt-out preferences in the user management screens.

By default, the opt in/opt out preference checkbox always is *unchecked*.

The label on the opt in/opt checkbox is *Please send me e-mail about special offers and products*, which has the AOL message key, IBE_PREF_OPT_IN_OUT.

Table Entry with Explicit User Behavior

Following is the opt in/opt out action in the HZ_CONTACT_PREFERENCES table, according to specific actions on the part of the user:

- **User Explicitly Opt In:** If the user explicitly elects to Opt In and updates the page, then the Opt In preference is stored automatically in HZ_CONTACT_PREFERENCES table, Preference Code column, as a DO entry.
- **User Explicitly Opt Out:** If the user elects to Opt Out and updates the page, then the Opt Out preference is stored automatically in HZ_CONTACT_PREFERENCES table, Preference Code column, as DO NOT entry.

Managing Business Users with Oracle iStore

This section contains information for managing B2B users in the Customer Application.

B2B User Management Overview

In a typical setup, primary users manage other business users in their companies. Access to all of the user management screens is provided within the Profile, Administration pages. The Administration screens support the following functionality:

- Contact and user management
- User registration approvals
- Role management
- Account management

This functionality leverages Oracle TCA schema and the Oracle CRM Technology Foundation user management framework.

Contact and user management functionality provides primary users of a company with the ability to search contacts and users, create contacts and users for their companies,

assign roles and sites that have access restricted by responsibilities, and assign accounts for users within their company. If you are integrating Oracle iStore with Oracle Partner Management, partner primary users can define partner profile attributes for a contact.

Both primary and non-primary users can self-register themselves. Once a user has registered, depending on the user type, an approval task will be generated and assigned to an approver. The approver is notified through Oracle Workflow that there are users that require approval. For a list of notification events related to registration, see the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1.

Primary users utilize the Pending Approvals page within the Customer Application Administration menu to approve and reject user registration requests for their companies. If a primary user is a part of an approval group, he will see all pending approvals within his approval group. Once all required approvals are granted, the user is notified via e-mail and given access to the system.

B2B User Registration Approval Options

In the Oracle CRM System Administration Console, implementers can set up B2B user registration to require approval or not. Whether or not a user is automatically approved depends on the *Approval by* flag in the user type definition. In the sysadmin console, the Approval by flag can be set to:

- **No approval required:** In this case, users are automatically approved
- **JTF User Approval:** This is the default approval setup for B2B users.
- **Custom approval setup:** You set these up by organization in the Approvals menu.

If you have set up B2B registration to require approval, then these users must be explicitly approved. Typically, a primary user (or multiple primary users) from the B2B user's company submits the approvals in the Oracle iStore user management pages.

New B2B users created by a primary user from the Contact Management screens will be automatically approved, if one of the below is true:

- The primary user is the lone approver in the approval hierarchy. If there are any other approvers in the hierarchy, their approval is also necessary before the user is designated as approved.
- In the approval hierarchy, only the user who is the JTF Primary User is set up as the approver, and the iStore primary users have the JTF_PRIMARY_USER_SUMMARY permissions (seeded by default in the primary user role).

When a user's registration request is submitted, the username entered is created in Pending status in the Oracle Technology Foundation tables (FND_USER table). Only upon approval is the username enabled in the system. Upon rejection, the username is removed from the system and can be re-used by this or another user. However, if a Partial Registration request is rejected, the username is not removed, nor is the user's

contact information inactivated. If an Online Access to Existing Account user is rejected, the username alone is removed; the user's contact details will remain active.

For additional setup information, see the section, "Ensuring Proper Dependency Setup for User Management", within this chapter.

Users also can be created in the Oracle CRM System Administrator Console. See the online help available through the System Administrator Console for details.

Mandating Company Phone Number During Registration

Implementers can mandate that a business phone number is required when users are registered or a contact is created by setting the profile option, IBE: Mandate Contact Business Phone, to Yes. If the profile option is Yes, the company phone number is required in all of the user management screens that relate to registering, creating, or updating contacts and users. It is also mandated on all self-registration screens in the Customer Application. Relevant fields will be marked with an asterisk (*). See the appendix, Profile Options, page A-1, for more information on the profile settings.

Self-Registration Steps for B2B Users

Non-administrative and primary B2B users can use the steps below to self-register using Oracle iStore's registration pages.

For Oracle Partner Management steps, see the Oracle Partner Management documentation and the chapter, Integrating Oracle iStore with Oracle Partner Management, page 27-1.

Note that this flow is the default setup for B2B users registering through Oracle iStore framework. See the section, "Ensuring Proper Dependency Setup for User Management", within this chapter, for information about changing the default configuration.

In the following flow, it is assumed that a Central Account Provisioning system (CAPs) is not implemented. For more information on registration in the event of a CAPs, see the chapter, Integrating Oracle iStore with Oracle Single Sign-On, page 32-1.

Steps

1. The user navigates to the Registration page via one of the methods described in the section, "Registering Using Oracle iStore".
2. The user selects the appropriate registration link, as described in the section, "User Type Registration Selections".
3. The user fills in the required registration data.
4. Optionally, the user checks the Opt In/Opt Out checkbox, *Please send me e-mail about special offers and products*.

5. The user submits the registration request. Subsequent activities are different for non-administrative and primary users:
 - For non-administrative users: Both the primary user for the registering user's company and the user himself receive an e-mail notifying them of the registration request. The primary user's e-mail informs him that the user has requested registration and needs approval or rejection. The registering user's e-mail informs him that his request has been received.

At this point, the user still needs to be approved before he has any access to the Customer Application. The primary user for the user's company can follow the steps in the section, "Approval of Self-Registered B2B Users", to approve or reject the user.

Following approval, the B2B user receives another e-mail notification informing him that his approval has occurred. If his registration has been rejected, he also receives an e-mail notifying him.
 - For primary users: By default, when this user submits his registration request he is automatically approved and immediately has full primary user permissions in the Customer Application.

Upon approval, a new Registry ID is created for the primary user's company in Oracle TCA schema. To find out his Registry ID, he can log into the Customer Application and navigate to Profile, Company Profile. The Registry ID is also sent to the primary user by e-mail, in the registration confirmation.

A new financial account also is generated for the primary user's company. To find financial accounts available for use, he can navigate to Profile, My Profile, Accounts.

The primary user receives an e-mail notification about his approved registration.

Oracle iStore B2B User Roles

In the context of Oracle iStore, roles typically apply only to B2B users. B2B users can be either regular B2B or primary B2B users (unless integrating with Oracle Partner Management, in which case you may have partner regular and primary users; or if integrating with Oracle iSupport, similarly you may have iSupport regular and primary business users). Primary users have administrative abilities, including user management permissions and the ability to update company details in the profile pages. Regular B2B users have view-only permissions in the company Profile pages.

See the appendix, Seeded User Data, page B-1, for a list of seeded roles and permissions.

If the seeded B2B user roles do not meet your business needs, you can create new roles with any combination of permissions.

Overview of Primary Users and the User Management Pages

Oracle iStore primary users can use the Contact Management and Role Management pages within the Customer UI Profile, Administration menu to create and manage users within their companies.

Rules Regarding Primary User Abilities:

Note: The following rules will not apply, of course, if you have customized your setup to support a primary super-user charged with managing users across organizations.

- By default, a primary user can only perform user management tasks for other B2B users within his company.
- A primary user can only award to others the roles that he possesses.
- A primary user can only assign sites to others that he also can access.
- The primary user can view and assign accounts belonging to his company, even if he is not assigned to them.

Pending Approvals Page

The Pending Approvals page allows primary users to:

- Search for users requesting approval, request names, and approval types
- Approve user registrations and enrollment requests
- Reject user registration and enrollment requests

The pending approval table displays the following information:

- **Request Date:** This is the date the request was initiated.
- **Requester Name:** This is the username of the user requesting approval.
- **Contact Name:** This is the name of the contact associated to the username.
- **Email Address:** This is the e-mail address associated with the contact record.
- **Request Name:** This is the registration name or enrollment name of the user type.
- **Approval Type:** This will show either User Registration for a registration request, or Enrollment for an enrollment request.
- **Details Icon:** Primary users can select this icon to view a summary of the user's information in a pop-up window.

Approval Types

Approvals displaying in the Pending Approvals page will be one of two types:

- **User Registration:** This approval is initiated when a user self-registers
- **Enrollment:** This approval is initiated when an enrollment has been created through the sysadmin console and needs approval

Note: Enrollment requests are not shown until the user registration request is approved.

Conditions for Approving Users

Following are the conditions for the approvals to display in the Pending Approvals page:

1. Pending approvals display in the Pending Approvals based on the following criteria:
 - Only display approvals assigned to the logged in primary user.
 - Only display approvals of the same company as the logged in primary user.
 - If Approval Groups are being used, only display approvals assigned to the Approval Group (filtered by user's company) of which the logged in user is a part, and only if the user has `JTF_PRIMARY_USER_SUMMARY` permission. Out-of-the-box, the iStore primary user enrollment already is seeded with a role containing this permission. See the section, "Best Practice: Set up Approval Group", for more information.
 - If Approval Groups are being used, in addition -- if there are any approvals assigned directly to the user -- these are also displayed.
2. Primary users can approve user registrations and enrollments only if they are defined as approvers for their companies, for the approvals defined at the user type and enrollment level.
3. Primary users only have access to the Pending Approvals screen if they are associated to the permission, `IBE_INT_PENDING_APPROVAL`.

Account Assignment During Approval

When approving users, if the user does not already have an account, by default, the system will generate an account for the user, in case of B2C users; in the case of B2B users, a new account is created for the organization, and further, account roles are created for the user. The primary user also can assign additional accounts to the user. Oracle iStore also allows primary users to remove accounts from users. See the section,

"Approving B2B Users Who Have Self-Registered", for more information.

For information on assigning or removing accounts for B2B users in a post-approval scenario, see the sections, "Account Assignment After Approval" and "Removing Accounts from Users".

For registration rejection information, see the "Rejecting a Request" section, below.

Approving B2B Users Who Have Self-Registered

To approve users:

1. Primary users sign in to the Administration page available within the Profile menu of the Customer Application (the user may first need to select a specialty site to access this menu). The Pending Approvals page lists pending user registration and enrollment requests in the Requests Summary table. Note that the Requests Summary table displays only requests that are associated to an approval process that the primary user has been assigned to. If the user belongs to an approval group, then pending approvals for the group also are displayed.
2. To approve a user request, the primary user first selects the request and presses the Approve button. This retrieves the Submit Approval Request page, which shows the user's information at the top and a list of available account numbers down below. The primary user can enter comments and associate the user with one or more financial accounts before submitting the request. If the request type is an enrollment, the Submit Approve Request page displays the appropriate enrollment information instead of user information.
 - **Note:** In the Approve Request page, the primary user can enter comments into the Comments textbox. In the case of an established approval hierarchy, if this user has already been approved by a different approver, the last approver's comments are displayed. If no hierarchy is set up, then no comments by other users are shown.
3. Once the primary user submits the approval, a confirmation message is displayed (if other approvers are required, a message displays to this effect) and the primary user is shown the Update User page, where he can continue to modify details about this user, including updating contact information and passwords and assigning roles, accounts, and site access. If there are multiple approvers, the system will display to the primary user the Update User page with a message indicating that the user request still needs to be approved by other users; in this case, the approval status will remain as pending in Update User page.
4. If the approval is for a user registration, the user is created and an e-mail sent to the user notifying him of his approval. If the approval is for an enrollment, the parameters defined in the enrollment are accomplished, and the primary user(s) are e-mailed about the approval.

Rejecting a Request

To reject a pending request, in the Pending Approvals page, the primary user selects the radio button of the applicable request and then presses the Reject button. This retrieves the Reject Request page, which displays relevant user information (e.g., name, e-mail address) at the top and a Comments textbox down below. Any information the primary user enters into the Comments textbox is included in the e-mail notification sent to the user.

Upon rejection, the request is removed from the pending requests queue. However, the user still shows up as a contact in the Contact Management page.

Contact Management Page

The Contact Management page within the Profile, Administration menu allows a primary user to perform the following tasks:

- Create new contacts or users
- Search for users
- Update user contact information and reset passwords
- Modify the marketing materials opt-in/opt-out flag for users
- View and modify role assignments
- Approve or reject user registration requests
- Assign accounts
- Assign users to specific sites

Note that in a typical implementation, primary users can only view and modify users within their own organization. The Contact Management page displays all users who are parties belonging to the relationship types "contact of" and "employee of" for the primary user's company.

The Contact Management page presents user and contact information in the Contacts Summary table:

- **Contact Name:** This is the combination of the first and last name of the party as defined in Oracle TCA.
- **User Name:** This is the username associated to the contact.
- **E-mail Address:** This is the e-mail address entered by the user during registration, or supplied for the user by the primary user.

- **Approval Status:** This column reflects registration approval status and will show either Approved, Rejected, or Pending. It will be empty for a user who is a contact and not yet a user.
- **Status:** This column, indicating whether the user is active or not, will show either Active or Inactive.
- **Update:** The Update icon is a link to the contact/user details. The primary user can use the update pages to update contact/user information, and to convert registered contacts into registered users by awarding roles and accounts to them. For users whose registration approval is in pending status, the Update icon will be inactive. Those whose Partial Registration approvals have been rejected can still be updated as contacts by primary users; however, their user information is read-only. Those whose standard registration requests have been rejected will be shown as inactive contacts.

Note: In the case of Oracle Partner Management integration, a link to the Partner Profile for partner contacts and users is provided. Primary users can use the pages within this link to associate the user to a partner profile. The link to Oracle Partner Management is shown only when a Contact is selected and the Update Contact/User page is displayed.

Searching for Contacts and Users

In the Contact Management page, primary users can search for contacts and users with their companies. Following are the search options:

- Contact Name or User Name --- The Search By LOV can filter the search by contact name or user name. The percent (%) sign can be used as a wildcard in the textbox.
- Non-registered users filter -- Selecting the *Show contacts not registered as users* checkbox limits the search results to only contacts of the company that are not registered as users.

Note that primary users cannot find their own usernames, etc., in the search mechanism.

Creating Contacts

Primary users select the Create Contact button in the Contact Management page to access the Create Contact page where they can create a contact. Following are the data entry fields in this page:

- First, middle, and last name
- Email address
- Business and personal telephone numbers, and fax number

- Send e-mail about special offers and products checkbox to opt the contact in or out of being sent marketing materials

To register the contact as a user, the primary user would select Yes under *Do you want to register this contact as a user?*. See the "Creating B2B Users" section, below, for more information.

Updating User and Contact Details

In the Contact Management page, primary users can select the Update icon for a specific use or contact to update details for that person. Following is the information the primary user can update:

- **Name:** First, middle, and last name is updateable.
- **Telephone Numbers:** Business and personal telephone and fax numbers are updateable.
- **Marketing Opt-in/Opt-out:** The *Send e-mail about special offers and products* checkbox is updateable.
- **Default Currency:** This LOV displays for partner users only.
- **Username and Password:** If a username is already associated with this user, the primary user can only reset the password, and the username is read-only. If the user is not registered, then the primary user can assign a username and password to the user, after choosing to make the contact a user.
- **User Start Date and End Date:** In the update screen, a start date and (optionally) an end date for the user are displayed.

Creating B2B Users

Primary users can create new B2B contacts for their companies, if they have the IBE_INT_MANAGE_CONTACT permission in their user role.

For a list of permissions, see the appendix, Seeded User Data, page B-1.

The primary user has the option of creating a contact or a user. A contact is characterized by contact information only; no username, password, roles, or responsibilities are awarded. When a user is created (with username and password defined), the party ID of the company is associated with an FND_USER. In Oracle TCA, contacts and users are created with an "employee of" relationship type of the primary user's company.

Steps

1. The primary user signs in to the Customer Application and selects a specialty site.

2. The primary user selects Profile, then Administration to retrieve the Contact Management page.
3. The primary user selects Create Contact.
4. The primary user enters the contact information.
5. Depending upon whether he is creating a contact or a user, the primary user selects either Yes or No for the option, *Do you want to register this contact as a user?*
6. If creating a contact, the primary user selects No and then selects Apply to save changes.

Note: To convert a contact to a user, the primary user accesses the Update icon for the user and follows the steps below.

7. If creating a user, the primary user selects Yes and then fills in the user information in the Registration area of the Update Contact page:

- **User Type:** The administrative user selects either Administrator or Business user. When a primary user create a new user with the Administrator user type, the new user receives the standard privileges of this user, as defined by your implementation.

Note that the user types displayed in this page come from the extensible user type lookup, IBE_UM_STORE_USER_TYPES (if the primary user is a B2B user) or IBE_UM_PARTNER_USER_TYPES (if the primary user is a Partner user). An exception to this rule is that Need Online Access user type lookups are filtered out of the page. If you create custom user types, you can link them to the lookup and display the user type in this page, so that the primary user can also select the custom user type for the new user, and, therefore, assign the corresponding responsibilities and roles to the user. See the chapter, Implementing Messages and Prompts, page 16-1, chapter for the lookup seeded values.

- **Username:** Username should be unique across all users, whether or not they belong to the same B2B organization.
- **Password:** When a user is created, the password is set to immediately expire. When the new user logs in, he will be prompted to reset his password.
- **Primary Account:** The primary user selects the primary account for the new user. If only one account is associated with the company, then only one account will display in the LOV.
- **Default Currency:** Default Currency appears for partner users only. This field defines the default currency displayed in the opportunities summary tables.

- **Start Date and End Date:** Start Date defaults to system date. End Date is optional. Note that a username can be end-dated and the contact associated with the record can still be active. Users cannot log in using end-dated usernames. If the selected user type requires approval, until the user is approved, start date and end date are set to GMISS_DATE; in this case, the user cannot log in until approved.

Note that the primary user can choose to inactivate the contact and continue creating the user. The user will not be allowed to log in as long as his status is Inactive.

8. The primary user selects Apply to save the changes. The user is automatically approved (if the implementation is set up for auto-approval), and an account number is assigned to him based on the primary account of the primary user. The default business user role and customer responsibility are assigned to the new user. The creation of the user generates the new user approval notification e-mail for the user; the approval e-mail displays username and password. If there are still other approvers above the current, logged-in primary user in the approval hierarchy setup, the new user created will still be pending for approval by the approvers in the hierarchy.

The user will be asked to enter a new password on attempting to access the Customer UI areas which require sign-in.

9. If Oracle Partner Management is implemented: The partner primary user can select View Profile to launch the partner profile page, where Partner primary users can view and update the contact partner attributes. This button is displayed only if a contact belongs to a partner company and is a primary user for the partner company.

Important: In the case of Oracle Partner Management integration where the user belongs to a partner company, the user must also be created as a CRM Resource. This is required to have this user recognized in the Oracle Sales framework. The Resource needs to be assigned to a Resource role, and the partner contact Resource needs to be defined as member of the partner company group. To achieve this automatically, Oracle iStore calls an Oracle Partner Management API; there is no need to do this manually.

For more information on setting up user approval functionality, refer to the following sections within this chapter:

- "B2B User Registration Approval Options"
- "Setting up Approval Definitions"
- "Conditions for Approving Users"

Assigning Roles to B2B Users

Since the default business user role is automatically assigned when a B2B user is approved, then this procedure would be used to add additional roles to a user. Be sure the primary user granting the roles also has the new roles himself.

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile, then selects Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, and then he selects Roles, Assign Roles.

Note that the roles available for assignment are limited to those not yet assigned to the user but already assigned to the primary user.

3. After marking the desired roles for selection, the primary user presses Select. The user to whom the roles are awarded can immediately utilize those roles.

Note that additional custom roles also can be removed from B2B users, as well as deleted from the application.

Assigning Sites to B2B Users

Primary users can associate other users in their companies to Oracle iStore sites. The sites that a user is associated with initially depend upon the responsibility associated to his user type and sites that have already been restricted by responsibility --- when a site responsibility and a user's responsibility match during registration, the user is assigned to the site.

The permission `IBE_ASSIGN_SITES` controls the appearance of this functionality. Partner primary users are not assigned this permission, since Partner Management does not allow manual assignment of sites access, because they assign responsibility programmatically through partner memberships.

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile, and then selects Administration.
2. In the Contact Management page, the user selects the Update icon for the user, then selects Sites, Assign Access to launch the Select Sites page, where the primary user can view a list of candidate sites.
3. After marking the desired sites for selection, the primary user presses Select to apply the assignments.

The following rules apply when assigning sites:

- Only sites that have access restrictions by responsibility are displayed in the list of sites for a user. Public (non-restricted) sites are not included in the list, since users can always access these sites, even when they are not assigned the appropriate responsibility.
 - Sites available for assignment are limited to those also available to the primary user.
 - The Search and Select Sites page performs a default search on sites assigned to the primary user.
 - If access is removed for a site, the responsibility assignment for the user is end-dated. If this responsibility is also associated to other sites, the user's access to these sites is removed. A warning message is displayed when this occurs.
 - In the case of Oracle Partner Management primary users, these primary users will not have access to this page, since the access to the partner sites is controlled through membership.

Account Assignment After Approval

Account creation is not explicitly supported in Oracle iStore. No user can create accounts. Accounts are automatically generated by default, when users are approved. Primary users assign accounts to business users at approval time or through the Contact Management screens after approval.

Note: The primary user can assign all accounts for his company, even if the accounts are not assigned to him.

Use the following steps to assign accounts to Oracle iStore B2B users after approval.

For steps to assign accounts during approval, see the sections, "Account Assignment During Approval" and "Approving B2B Users Who Have Self-Registered".

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile, and then selects Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Accounts, Assign Accounts. The accounts displayed are all those available and active for the company. The primary user will not be able to select account numbers already assigned to the user.
3. After marking the desired accounts for selection, the primary user presses Select to apply the selection.

Note that a user must possess at least one account number to complete transactions.

Removing Accounts from Users

To remove accounts from users within his organization, the primary user can do the following:

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile, and then selects Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Accounts. All assigned accounts display for the user.
3. To remove an account, the primary user selects the Remove icon for the account number. A warning message is displayed, the primary user must confirm the remove action.

Role Management Page

The Role Management pages let primary users:

- View available roles and role permissions
- Create new roles and assign permissions to these roles
- Create, modify, and delete custom roles

Creating and Updating Custom Roles

Primary users can create new roles and assign permissions to these roles. Following are points of behavior:

- The permissions assigned to custom roles can be altered.
- After creation, the name and description of custom roles are non-changeable.
- Seeded roles cannot be altered.
- New custom roles are automatically assigned to all the primary users of the company

Steps

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile, Administration, Role Management, Create Role.
2. The primary user enters a name for the role, optionally enters a description, and moves the desired permissions to the Assigned Permissions window.

Note that only those permissions assigned to the primary user will be available for

him to select. For a complete list of permissions, see the appendix, Seeded User Data, page B-1.

3. The primary user selects the Apply button to save the changes. A confirmation message is displayed.

Removing Roles from Users

To remove roles from users within his organization, the primary user can do the following:

1. The primary user signs in to the Customer UI and selects a specialty site. He navigates to Profile, and then selects Administration.
2. In the Contact Management page, the primary user selects the Update icon for the user, then selects Roles. All assigned roles display for the user.
3. To remove a role, the primary user selects the Revoke icon for the role. Note that no warning is given before the revoke action.

User and Company Profile Management Overview

User and company information (for example, names, addresses, and phone numbers) is stored in the profile pages of the Oracle iStore Customer UI. Profile pages allow users to view, change, and maintain their user information. In the case of B2B users, access to their company's profile pages allows them to view organizational information, such as Organization ID/Registry ID, web site address, annual revenue, and a list of administrators -- and primary users of the company are allowed to update such data.

Profile page data is stored on the back-end in the Oracle customer model, Oracle TCA.

B2B access to many of the profile pages can be controlled through permissions within a user's role. See the section, "Configuring Profile Menus", within this chapter, for more information.

Note: By default, any user registering using Register as individual, Register your company, and Register as a user of an existing company user types will receive the same level of Profile page permissions in Oracle iStore.

Integration with Other Oracle Applications

Two important aspects of the profile pages are their consistent look and feel between integrating applications and their ability to be configurable by application. For example, if you are integrating Oracle iStore with Oracle iSupport and/or Oracle Partner Management, your end-users' profile pages will access a common set of screens provide by Oracle iStore, plus allow you to customize your own display of a subset of the profile screens. This customization ability is provided through Oracle iStore Template Manager

-- since each profile page is derived from an Oracle iStore template, you can configure the display of the profile pages to suit your business needs.

For users of the integrating applications, the profile pages present and allow updating of personal and company information whether the users are logged into Oracle iStore, Oracle iSupport, or Oracle Partner Management.

Personal Profile Pages

This section contains information about the personal profile pages accessible through the Profile navigation icon.

Note: All information in this section related to storage of Oracle TCA data is relevant only to B2B users. B2C users' information is always stored at the person party ID level.

Personal Information Profile Page

Within the Details link of the Personal Information page, users can record and update their own personal details, including:

- Name -- This information is stored under HZ_PARTIES in Oracle TCA schema.
- E-mail address -- Address entered will be the primary e-mail address for the user; stored under contact point of the party in Oracle TCA schema.
- Password -- Users can reset their passwords in this screen.

Note on SSO Integration: If Oracle Single Sign-On (SSO) is enabled, this page will only display and allow update of the user's name and e-mail address -- password reset is provided through SSO; see the chapter, "Integrating Oracle iStore with Oracle Single Sign-On", for more information.

Note on Partner Management Integration: If integrated with Oracle Partner Management, two submenus display within the Personal Information page: Details and Profile. The Details page contains the functionality listed above, while the Profile page allows partners to update their profiles. The Profile link is enabled only for users possessing the required permissions (for example, those belonging to a partner company and associated to a partner profile).

Contact Information Profile Page

The Contact Information page contains three submenus: Address Book, Email Address, and Phone Book:

- Address Book --- Users can create, update and delete addresses in the Address Book page. Address information is stored in HZ_LOCATIONS, is associated to a party site in HZ_PARTY_SITES, and for B2B users is linked to the party ID or party relationship ID (Registry ID) in HZ_PARTIES.

Note on Address Usages: Oracle iStore supports only creating billing or shipping

address usage types; however, other usages created in other applications (for example, a delivery address) will display and show their correct usage in Oracle iStore. Users can identify whether an address is preferred for that usage or not.

- Address creation --- When B2B users create a billing or shipping address, it is related to the company. The primary address is defaulted into the shopping cart.
 - Preferred addresses -- Users can flag one billing and one shipping address as preferred. Oracle iStore then uses the preferred addresses when data is defaulted into shopping carts during checkout. Note that if a new address is created and marked as preferred, the previous preferred address is unmarked as preferred.
- Deleted addresses --- Deleted addresses are end-dated in the database, not actually removed.

Note: If the B2B user does not have the `IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS` permission, the address cannot be used as a preferred address, or for billing.

- Email Address --- Users can create new e-mail contact points, or update existing e-mail contact points. Functionality is provided to allow users to set a primary e-mail address. If a primary e-mail address already exists and a user marks a new one as primary, the current primary e-mail address is unchecked and the new one becomes primary. If only one e-mail address is created, it is set as primary by default. Users also can select whether they prefer to receive an e-mail in HTML or text format. If not specified by the user, the primary e-mail address is the e-mail address first used during registration. Users can delete a primary e-mail address if they create another one and mark it as primary.
- Phone Book --- Users can create new telephone number contact points, or update existing telephone number contact points. Functionality is provided to allow users to specify the type of number entered, such as mobile, fax, business, or home number, and to specify the country code used in the number. Users are allowed to flag one number as the primary number. Users can delete a primary telephone number if they create another one and mark it as primary.

Payment Book Profile Page

In the Payment Book, users can create, update, and delete preferred credit card information. Oracle iStore validates the credit card information upon entry. The preferred credit card is used in defaulting in the checkout phase. Credit card information is stored in Oracle Payments schema, in the `IBY_SECURITY_SEGMENTS` table. Credit cards potentially can be organization-stripped. If a user deletes a credit card marked as primary and then creates a new credit card, the new card number will be

marked as primary automatically. The iStore user must turn off encryption and then switch it on to obtain the credit card information.

Accounts Profile Page

Oracle iStore supports multiple financial accounts per user, which can be viewed in the Accounts page. Users also can see and switch accounts in the Welcome Bin in the Customer UI. Only *active* accounts assigned to the user are displayed, as stored in the HZ_CUST_ACCOUNTS table.

Oracle iStore allows users to set a primary account in the Accounts page. The primary account is used as the default account for any transactions performed in the Customer UI. If the customer does not explicitly assign a primary account, then the account used as primary will be the account assigned during registration, with the first account number created taking precedence.

The account used during a user's session is called the *session account*. B2B users with multiple accounts can switch session accounts in the Customer UI pages through the Welcome Bin. Switching session accounts can allow a customer to complete and view transactions associated to other accounts. The session account for a B2B user is used at checkout and in viewing order details. However, even if an account number is used by the application as the account number for the user's login session, the user still must explicitly mark an account number as primary before it will be stored in TCA as the user's primary account number.

Note that because they do not have multiple accounts, B2C users will not see the Accounts page, nor will they be able to switch accounts in the Welcome Bin.

Preferences Profile Page

The Preferences page allows users to set communication preferences, orders preferences, and more.

Important: The Preferences page may include links to Sales and Support pages, if integrating with Oracle iSupport or Oracle Partner Management, and the user has the required permissions.

Following are the Preferences pages:

General Preferences --- This link always displays, regardless of any integration with other applications. The following options are available:

- Date format -- A drop-down menu allows the user to select a date format for dates displaying shopping cart expiration values.
- Preferred language for e-mail communications -- This preference sets the preferred language for e-mail notifications and enables smooth functioning of the Workflow directory. The preferred language is stored in the HZ_PERSON_LANGUAGE table. Initially, the language is the one defaulted during registration from the user's session language.

- Marketing preferences -- Users can choose whether to receive marketing communications.

Order Preferences --- This link always displays, regardless of any integration with other applications. The following options are available:

- Order Preferences --- Users can select a preferred support level and a preferred shipping method. Users also can create shipping and billing addresses to be used when placing orders. Note that if a B2B user changes a shipping or billing address and there is no value in the Contact column, this means that the address is a company address and not a personal address.
- Express Checkout Preferences --- The Enable Express Checkout checkbox allows users to turn on or off Express Checkout. Note that users must first set up preferred shipping and billing addresses and record valid credit card data in the Express Checkout Preferences area before Express Checkout will function properly. The preferred shipping method set in the Order Preferences page is used as the default shipping method for Express Checkout. If Express Checkout is enabled and the preferred shipping method is not selected, a warning message displays, telling the user to select a preferred shipping method.
- Support Preferences --- Provided by Oracle iSupport, this page allows users to select subscriptions, indicate preferred days to receive e-mails, and set the user signature for forums. A user must have the required permissions to see this page.

Company Profile Pages

This section describes the company profile pages accessible through the Profile navigation icon.

Note that in the case of integration with Oracle iSupport or Oracle Partner Management, B2B and partner users can access the same company profile screens, whether logging in from iStore, iSupport, or Partner Management.

Note: All information in this section related to storage of Oracle TCA data is relevant only to B2B users. B2C users' information is always stored at the person party ID level.

Company Information Page

Business and partner users (if Oracle Partner Management is integrated) can view company details in this page, if they have the permission IBE_INT_ORG_DETAILS in their user role.

Note that B2B users with the IBE_INT_UPDATE_ORG_DETAILS permission in their user roles can also update the company details information.

The following is displayed for company information:

- Company Name --- The company name is stored as the party name of party type

organization, in HZ_PARTIES.

- Registry ID --- This read-only field displays Organization ID/Registry ID in the Oracle TCA schema. Stored as party number in HZ_parties for the party of type, organization. TCA for the All B2B users can view the Organization ID. This would be useful, for example, if primary users need to communicate this information to non-primary users who wish to register.
- Annual Revenue --- This field, updateable by primary users with the required permission, shows annual revenue of the company.
- Currency --- Primary users can select a currency to associate to the annual revenue entry. The currency drop-list will show all currencies enabled in Oracle General Ledger, along with the description of each currency.
- Total Employees --- This field, updateable by primary users with the required permission, shows total employees in the company.
- Year Established --- This field, updateable by primary users with the required permission, shows the year the company was established.
- Web site --- This field, updateable by primary users with the required permission, indicates the website URL of the customer's company. If defined, the website icon is enabled and user can select the icon and launch the website in a new browser window.

Important: In the case of integration with Oracle Partner Management, the Profile link also appears, allowing access to partner profile attributes. (Partner profile attributes are configurable at implementation time; see the Oracle Partner Management documentation for details.) B2B and partner primary users can update the company details and the partner profile attributes if assigned the appropriate permission. Non-primary users should not be assigned this permission.

Contact Information Page

In the Contact Information page, business and partner users (if Oracle Partner Management is integrated) can view the company address book, e-mail addresses, phone numbers, and telex numbers.

Notes Regarding This Functionality:

- View permissions for company contact information are awarded through the following permissions: IBE_INT_ORG_DETAILS, IBE_INT_ORG_ADDRESS_BOOK, IBE_INT_ORG_EMAIL_ADDRESSES, IBE_INT_ORG_PHONE_NUMBERS, and IBE_INT_ORG_TELEX_NUMBERS.
- Only B2B users with the IBE_INT_MANAGE_CONTACT_INFO permission can create, update, and delete addresses and company contact points. Users without

this permission will not see the corresponding create, update, and delete functionality.

- Note that with addresses, *preferred* and *primary* have different meanings -- *preferred* is a user-defined preference for use, while *primary* is associated to the usage of the company address in Oracle TCA. When a company's primary user registers the company for the first time, the address he uses as the company address is marked as the primary address for the company.
- One primary identifying address must always be available in the corporate address book. Users are never allowed to delete the primary company address, and the Delete icon is disabled for the primary identifying address.

Contact information includes:

- Company addresses --- Displays address information of the company. The address list displays all addresses associated to the party organization, regardless the usage of the address. Displayed are:
 - Address -- The address list displays all addresses associated to a user's party, regardless the usage of the address. At least one address needs to be defined as primary for the company. To update or delete an address, users with the required permission will be able to access the Update and/or Delete icon in the address table row.
 - Address type -- Stored in HZ_PARTY_SITE_USES, this field displays all the business purposes of the address and indicates whether they are primary or not.
 - City, state and zip code
 - Country -- The country selection determines the address style the user needs to follow when creating a new address.
- Company e-mail addresses --- Business and partner users can view, update and create new e-mail addresses for a company if they have the correct permission in their user roles. Users are allowed to set a primary e-mail address. If a primary e-mail address already exists and a user marks a new one as primary, the current primary e-mail address is unchecked and the new one becomes primary. If only one e-mail address is created, it is set as primary by default. Users also can select whether they prefer to receive e-mail in HTML or text format.

Note that e-mail addresses created for B2B users are not the same as those created for a company.

- Company phone and telex numbers --- Business and partner users can view, update, delete, and create new phone and telex numbers for a company.

Administrators Page

Business and partner users can view the list of their company administrators, if they have the permission IBE_INT_ADMINISTRATORS. The list of administrators includes only those users who are primary users of a company.

Channel Team Page

Partner users can view the list of channel managers assigned to their companies, if they have the permission, PV_CHANNEL_TEAM, in their user roles. This screen is provided by Oracle Partner Management, and this link is provided only if your implementation is integrated with Oracle Partner Management.

Memberships Page

Partner users can view the list of partner programs related to their companies, if they have the permission, PV_VIEW_MEMBERSHIPS, in their user roles. This link is provided only if your implementation is integrated with Oracle Partner Management.

Configuring Profile Menus

Oracle iStore's user framework allows you to configure the user Profile and user management menus to suit your business needs. This flexibility is useful for implementers who wish to control access to specific screens by specific user types and for users of different applications.

Access to functionality within each screen is controlled through roles associated with each user. Each permission within a user role is associated to a function which renders a portion of a menu. Roles are collections of privileges, and by creating custom roles and then limiting the permissions within these roles, administrators can control access to page elements. In addition, the menu rendering framework supports syntax which can restrict or allow users by users type (B2B or B2C).

At runtime, Oracle iStore's menu rendering framework filters out all functions to which the user has no access.

Supported Access Control Scenarios

Each function linked to the Profile menus can have specific levels of access control. Oracle iStore supports the access control scenarios shown in the following table. This table also shows the syntax to use for web HTML functions in the supported scenarios.

Web HTML Syntax for Profile Access Control Setups

Case	Scenario	Web HTML Syntax for Functions
1	No permission check	a.jsp
2	No B2C users can access the page Only some B2B users (with correct permissions) can access the page	a.jsp?pcc=<permission_code>&utc=b2b
3	All B2C users can access the page B2B users (with correct permissions) can access the page	a.jsp? pcc=<permission_code>&utc=b2c
4	All users (regardless of B2C or B2B) with specific permissions can access the page	a.jsp?pcc=<permission_code>

Implementation Guidelines

Use the following guidelines to assist your setup:

1. In order for the Oracle iStore menu rendering framework to know which permission and which user type is linked to each function, each function should append the permission code and user type to its web_html definition. See the above table for supported scenarios and syntax. For security reasons, when the Oracle iStore framework renders the menu, it hides the permission code in the UI.
2. Profile menus are consistent across all sites, regardless of which responsibility is associated to the site. Therefore, if you configure the Profile menus, the configuration will affect all of your sites.
3. You cannot entirely turn off a user's ability to see some Profile information. At a minimum, users will be able to see the My Profile menu within the Profile area.
4. Common screens associated to common permissions (those with INT in their names) can be assigned to Oracle iStore, Oracle iSupport and Oracle Partner user roles.

5. Profile screens that are application-specific should only be associated to permissions and roles owned by the integrating applications. For example, only Oracle iStore users who have been granted the business user role can access the company profile screens. Only Oracle iStore users that have been granted the primary user role can access the administration screens.
6. All Profile pages are identified as secure pages.

Steps to Configure Profile Menus

You may use the following steps to configure the profile menus for different responsibilities. For complete information on Oracle Applications menus functionality, see the *Oracle E-Business Suite Setup Guide*.

1. Using Oracle Applications (FND) menus functionality, create a new profile menu tree.
2. Link the profile menu to the user menu of the responsibility, IBE_CUSTOMER.
For performance reasons, the profile menu root must be set up directly under the responsibility menu root, at the second level of the entire menu tree.
3. Set the profile option, IBE: Use Profile Menu, at site level to the new profile root menu. This will override the seeded Oracle iStore profile menus attached to IBE_CUSTOMER responsibility.

Setting up Self-Service Login Assistance

If customers forget their user names or passwords, they can select the *Forgot Your Username/Password information?* link in the Login page to retrieve their login information. Oracle iStore Alert Workflow sends the seeded Forget Login e-mail notification to the user with his username and password.

Important: If your implementation is integrated with Oracle Single Sign-On (SSO), then the password assistance feature is provided through the SSO server. In this case, Oracle iStore's Forget Password e-mail notification is not used. See the chapter, *Integrating Oracle iStore with Oracle Single Sign-On*, page 32-1, for more information.

Self-Service Login Assistance Process Flow

Following is the process flow for Self-Service Login Assistance:

1. The user selects the *Forgot your Username/Password information?* link in the Login page. The Login and Password Assistance page opens.

In this page, the customer can enter:

- Username

- E-mail address
- Username and e-mail address

Note that if Oracle iStore cannot find a unique match for either username or e-mail address, then the user must enter both values.

If a user does not remember either username or e-mail addresses, he must contact the site administrator to reset the password.

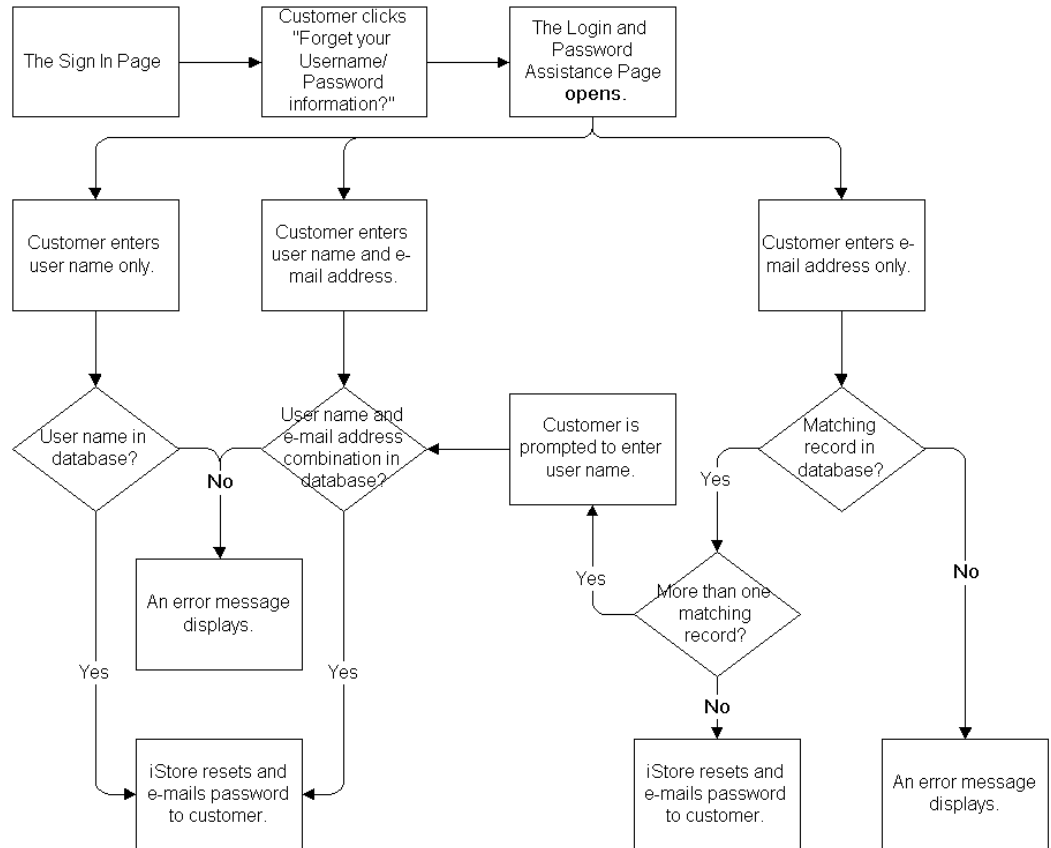
2. User submits the request.

- If the user has entered username only, Oracle iStore validates the username in the database. If a record of the user name exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If a record of the user name does not exist, an error message displays.
- If the user has entered username and e-mail address, Oracle iStore validates the user name and e-mail address combination in the database. If a record with the combination exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If a record with the combination does not exist, an error message displays.
- If the user has entered an e-mail address only, Oracle iStore validates the e-mail address in the database. If only one record with the e-mail address exists, the application resets the password and e-mails it to the customer using the seeded Forget Login notification message. If no record with the e-mail address exists, an error message displays.

If more than one record with the e-mail address exists, the application prompts the customer to enter a username. The application then validates the user name and e-mail address combination in the database. If the combination exists, the application resets the password and e-mails it to the customer. If the combination does not exist, an error message displays.

The following diagram shows the process flow that Oracle iStore follows to retrieve a user's login information.

Process Flow for Self-Service Login Assistance



See the chapter, *Implementing Messages and Prompts*, page 16-1, for details on how to access and modify the messages associated with this process.

Establishing Multicustomer Access Relationships

Here is an example for the setup steps used for creating additional contact and customer relationships. In this case, using Oracle iReceivables as a reference application to perform the data relationship setup.

Prerequisites: The IBE: Enable Multicustomer Access profile option must be enabled at the Site, Application or Responsibility level.

Assigning Existing Contacts to Additional Customers as a Self Service User

Use the following steps to assign existing contacts to additional customers as a self service user.

1. Navigate to the Customer Maintenance page in Oracle Receivables.

2. First, identify the customer which employs the existing contact. This contact would be designated as the From Customer Contact. In **Customers** tab, select Customer Type, enter search criteria and click **Go**. The search result is displayed.
3. Select a customer. The Accounts section displays accounts available with the customer. Click Details for more information on an account.
4. Select **Communication** tab. The Account Contacts list is displayed.
5. Click Details of the account contact to be used. Note the details of the account contact identified as the From Customer Contact. You would now assign this contact to another customer.
6. Navigate back to the **Customers** tab. Search for an existing customer, the To Customer, that would receive the new Self Service User relationship with the From Customer Contact.
7. The available accounts for the To Customer are displayed below.
8. Click Details icon for more information on an account for the To Customer. Select **Communication** tab.
9. Click **Create Contact**. Enter the same contact details as the From Customer Contact.
10. Click **Apply**. The Create Account Contact page appears.
11. Click **Use Existing Person**. In the resulting Select Focus region, select the option which corresponds to the From Customer Contact.
12. In the Account Contact page for the To Customer, click **Add Another Role** in the Contact Roles region. Select Self Service User from the Role menu.
13. Click **Apply**.
14. In the Account Detail page, click **Apply** to save the account and contact role relationship for the To Customer.

Verifying Data Setup for a Self Service Contact Relationship

Using Oracle Customers Online as a reference application, you can verify the data setup for a Self Service Contact Relationship:

1. In the **Customers** tab, **Organizations** subtab, enter details of the To Customer defined earlier in the Simple Search region and click **Go**.
2. Click To Customer link.

3. The customer overview page appears. Click **Visualize Relationships**.
4. The From Customer Contact now displays a Has Contact relationship with the To Customer.

When accessing the iStore application as a From Customer Contact B2B user, the Welcome Bin displays the default customer to which you have access. If you have been granted access to more than one customer, a magnifying glass icon is displayed in the Welcome Bin to switch customers and accounts, provided the IBE: Enable Multicustomer Access profile option has been set appropriately by the System Administrator.

Switching Customer and Account

Use the following procedure to switch the customer and account context for the current iStore application session:

1. Log in to the iStore Customer application as a B2B user.
2. The Product Catalog page appears. The Welcome Bin displays the default customer and account.
3. If you have access to more than one customer, click the magnifying glass icon in the Welcome Bin. The Search and Select Customer page appears.
4. Search and select a customer and account. The selected customer and account becomes the active customer and account for the current iStore application session. You can now place orders and view order history on behalf of this new customer account.
5. On returning back to the Product Catalog page, the Welcome Bin displays your current customer and account context.

Note: The switch-to customers and accounts relationship is used only in the duration of your current iStore application session. When you log out and log in later into the iStore application, your default customer and account is used. The switch-to customers and accounts are not saved from the prior iStore application session.

Implementing Customer Assistance

This chapter covers the following topics:

- Overview of Implementing Customer Assistance Chapter
- Customer Assistance Features Overview
- Sales Assistance
- Call Me Back Assistance

Overview of Implementing Customer Assistance Chapter

This chapter describes how to implement Oracle iStore customer assistance features.

Customer Assistance Features Overview

Oracle iStore provides mechanisms that allow customer assistance in your specialty sites. These include:

- Sales Representative Assistance -- See "Sales Assistance" section, below
- Call Me Back Assistance --- See "Call Me Back Assistance", below

Sales Assistance

During the checkout process, users can request assistance from a sales representative to help them finalize their orders. The Sales Assistance flow initiates when a customer requests help from the shopping cart or checkout pages.

Sales Assistance functionality requires integration with Oracle Quoting. Without Oracle Quoting, sales representatives will be unable to view carts that have become quotes when customers request Sales Assistance -- nor will sales representatives be able to update quotes and have the changes appear to customers in specialty sites. See the *Oracle Quoting Implementation Guide* for more information.

See the chapter, *Integrating Oracle iStore with Oracle Sales Contracts*, page 30-1, for information about the contracts negotiation flow.

Note: A B2B user must have the IBE_ASK_SALES_ASSISTANCE in his user role to request Sales Assistance or disagree with Terms and Conditions on an order.

Sales Assistance Process Flow

Sales Assistance events proceed as follows:

See the section, "Requesting Assistance or Rejecting T&Cs with Shared Carts", in the chapter, *Implementing Carts and Orders*, page 13-1, for information on this functionality with shared carts.

This flow assumes that the IBE: Use Sales Assistance Feature profile option has been enabled.

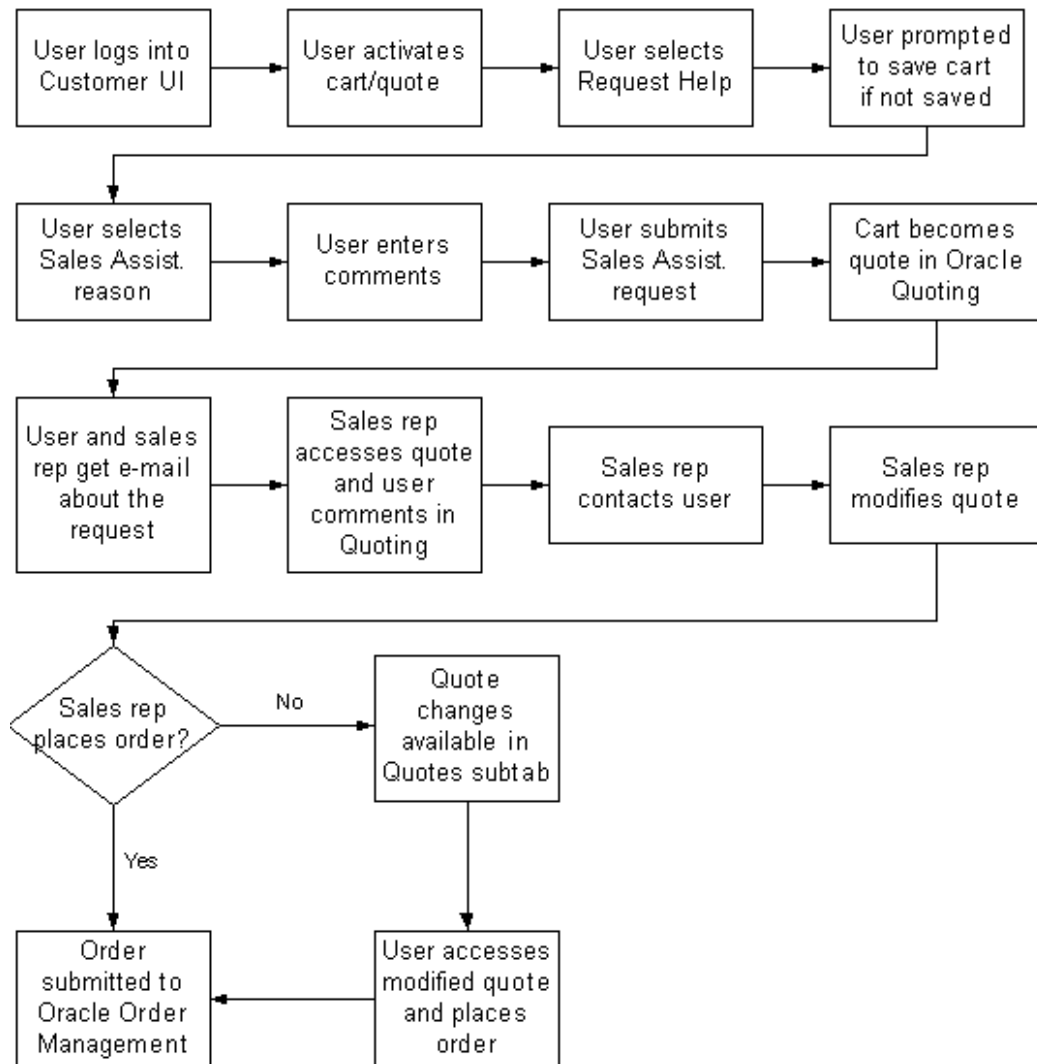
1. A customer logs in to a specialty site and activates a cart or quote.
2. The customer selects the Request Help action from the shopping cart or checkout pages. These actions retrieve the How can we assist you in finalizing your order? page. This page contains data entry/selection fields and displays contact information for the customer at the bottom. This page prompts the customer to:
 - Save the cart if it is not already saved.
 - Choose from a list of reasons why he needs assistance; these reasons are extensible lookups that can be modified; see the section, "Sales Assistance Reasons Lookups", in the chapter, *Implementing Messages and Prompts*, page 16-1, for more information.
 - Enter comments. The sales representative can view these comments in the quote's Notes section.
3. The user submits the request and a confirmation page displays. The confirmation page informs the user that his request has been received and that a sales representative will contact him. The page also shows the quote number, and summarizes the cart or quote details, including any shipping and payment information entered. Also note the following:
 - If it was a cart the customer initiated the Sales Assistance flow from, the cart becomes a quote in Oracle Quoting.
 - If it was a quote the customer initiated the Sales Assistance flow from, the quote is updated with the comments.
 - At any time, the customer can access the quote in the Quotes subtab under the Cart menu in the Customer Application and place the order, providing the quote has a status with a valid transition to the quote status, Order Submitted.

See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, and the *Oracle Quoting Implementation Guide* for more information.

- When a user submits a sales assistance request, T&Cs are attached to the quote.
4. Using Oracle Workflow, Oracle iStore sends an e-mail notification to the customer notifying him that his request has been received. The sales representative also receives an e-mail alerting him to the request. See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, for more information about the e-mail notifications. The customer's comments are included in the e-mail sent to the sales representative. The sales representative receiving the e-mail notification depends upon whether automatic sales representative assignment is set up through Oracle Territory Manager, and the value of the Quoting parameter, Default Salesrep. See the appendix, *Profile Options*, page A-1, for more information on the parameter.
 5. The sales representative can:
 - Contact the customer and provide the necessary assistance
 - Retrieve the quote in Oracle Quoting and view the customer's comments
 - Modify the quote (e.g., add or remove items, change prices, change T&Cs) in Oracle Quoting. If an approval process is being used in Oracle Quoting, the sales representative submits the quote -- with the T&Cs attached -- for approval.
 - Place an order with the quote for the customer
 - Publish the quote to the customer in the Oracle iStore Customer Application. Whether or not the approval process has completed, the sales representative can publish the quote back to the customer in the Oracle iStore Customer UI -- if the quote is approved, the customer can place the order, but if the quote is still pending approval, it will not be orderable. Note that if a sales representative publishes a quote to Oracle iStore with no T&Cs attached, and the customer places an order with the quote, the default contract associated with the site will be attached to the sales order (assuming that there is a default contract associated with the site).
 6. The user can see any changes the sales representative makes to the quote by accessing the quote in the Quotes subtab within the Cart menu.

The following figure shows the process flow.

Oracle iStore Sales Assistance Process Flow



Implementing Sales Assistance

To set up the Sales Assistance feature, follow these steps:

- Step 1 - Verify Oracle Quoting Integration
- Step 2 - Verify Oracle Workflow Integration
- Step 3 - Set Sales Assistance Profile Options
- Step 4 - Ensure B2B User Permissions

Step 1 - Verify Oracle Quoting Integration

See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, and the *Oracle Quoting Implementation Guide* for details.

Step 2 - Verify Oracle Workflow Integration

See the chapter, *Integrating Oracle iStore with Oracle Workflow*, page 34-1, and the *Oracle Workflow Guide* for details.

Step 3 - Set Sales Assistance Profile Options

When you are ready to activate the Sales Assistance feature, set the following profile options:

- **IBE: Use Sales Assistance Feature:** This profile option specifies whether Sales Assistance is enabled in your specialty sites. Set to Yes to enable the feature. See the appendix, *Profile Options*, page A-1, for more information.
- **ASO: Default Quote Status:** Set this to Store Draft at the iStore application level. See the Oracle Quoting documentation for more information on quote statuses.
- Set the Quoting parameter, *Default Salesrep*, to the default sales representative for sales assistance. See the "Oracle Quoting Integration Parameters" topic in the appendix, *Profile Options*, page A-1, for more information.

See the appendix, *Profile Options*, page A-1, for more information on the profile options.

Step 4 - Ensure B2B User Permissions

Verify that the B2B users who will be requesting assistance have the `IBE_ASK_SALES_ASSISTANCE` in their user role.

Call Me Back Assistance

Oracle iStore's Call Me Back feature allows you to offer your customers Call Me Back Assistance. With the callback feature, users can select a link in the Welcome Bin to request that a merchant representative call them back.

This section provides an overview of the call-back functionality in Oracle iStore.

For information related to the applications that provide the underlying technology for the Call Me Back feature, consult relevant Call Center Technology product documentation.

Call Me Back Business Flow

The business flow for the Call Me Back functionality is:

1. In Oracle iStore, a customer selects the Call Me Back link in the Welcome bin.
2. Once the call-back entry is made by the user, Oracle iStore sends the request to the CCT server group specified during implementation.
3. Oracle iStore calls the CCT APIs to provide the list of available call center server groups.
4. The CCT applications and hardware route the request to the Universal Work Queue (UWQ) server.
5. The UWQ server decodes the customer information (the Notes module captures comments from user) and assigns it to the UWQ client, and the call request immediately pops up in an agent's screen in Oracle Customer Care.

Implementing Call Me Back

To set up the Call Me Back feature, follow these steps:

- Step 1 - Ensure Setup of Dependencies
- Step 2 - Set Profile Option

Step 1 - Ensure Setup of Dependencies

The web call-back requires implementation of:

- CRM Interaction Center (formerly Call Center Technology - CCT) suite
- Oracle Universal Work Queue (UWQ)
- Oracle Customer Care
- Oracle CRM Foundation, Notes module

The purchase of call center hardware also is required.

Refer to Oracle CRM Interaction Center documentation for information on setting up the underlying products which enable the Call Me Back functionality in Oracle iStore.

Step 2 - Set Profile Option

Once the dependencies listed above are installed and functioning properly, set the profile option, IBE: Use Call Me Back at the application level for Oracle iStore.

Implementing Messages and Prompts

This chapter covers the following topics:

- Overview of Implementing Messages and Prompts Chapter
- Site Text Messages Overview
- Modifying Text Messages
- Site-Specific Messaging
- Custom Text Message Placeholders
- Self-Service Login Assistance Messages
- Modifying Oracle Application Object Library Lookups
- Sales Assistance Reasons Lookups
- Share Cart Roles Lookups
- Media Objects and Content Components Classes Lookups
- Site Group Names Lookup
- Returns Reasons Lookup
- Order Tracker Search Lookups
- User Type Lookups
- Search Engine Indexing Lookups

Overview of Implementing Messages and Prompts Chapter

This chapter provides an overview of the tasks required to configure and customize Oracle iStore message text and message prompts.

Site Text Messages Overview

In Oracle iStore, the Customer Application pages display various messages. The text for

most of the messages comes from the Oracle Applications Message Dictionary (AOL). Each Message Type or Message Name in AOL is associated to a single block of content for every supported language. Oracle iStore ships with hundreds of seeded AOL messages and associated seeded message text for the Customer and Site Administration UIs. The seeded text can be found in the FND_NEW_MESSAGES table.

Several of the AOL text messages are seeded as media objects in the Site Administration Media Objects pages. See the chapter, *Implementing Content*, page 10-1, for details.

The following table lists a few examples of seeded message text for the Customer and Site Administration UIs.

Site Administration and Customer UI Seeded Text Messages Sample

Message Name	Message Text	User Interface	Context
IBE_M_ADD_PROD UCTS_LBL	Add products to the section	Site Administration UI: Product Catalog	Description for adding products to a section page
IBE_M_CONFIRM	Are you sure?	Site Administration UI	Confirmation message for deleting a site
IBE_PRMT_EXPRESS _CHKOUT_PREF_G	Express Checkout	Customer UI: Personal Information Profile Pages	Text that appears on top of Personal Information Page
IBE_PRMT_WELCO ME_G	Welcome	Customer UI: Welcome Bin	Text that appears in the Welcome Bin

Modifying Text Messages

The seeded text in bins may not apply to your implementation, and you may want to change the default text.

Note that text content imbedded against an AOL prompt cannot be deleted. A new FND prompt should be created if new text needs to be added to a prompt, or the prompt should be deleted and a new one created. If a prompt is deleted, bounce the server in order for the existing message attached to the prompt to be removed from the Customer UI.

Use the following procedure to change the text of an Oracle Application Object Library (AOL) message.

For instructions on how to find the name of a specific message, see the section, "Locating Text in JSPs", below.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility and select Application, then Messages. The Messages window opens.
2. Choose View, then Find. The Messages search window opens.
3. All seeded Oracle iStore text messages begin with the product code, IBE. In the Find field, enter IBE% and select Find. Your search results display in the Messages search window.
4. Select the message that you want to modify and select OK. The Messages window is populated with the selected message.
5. Modify the message text for the appropriate language.
6. It is recommended that you bounce the Application server after making any message text changes.

Locating Text in JSPs

It may be cumbersome for you to locate specific messages found in the Customer or Site Administration UI. To simplify the process, you can find a specific message name by viewing the source code of the JSP file displaying it. Use the following procedure to locate AOL message text found in the Oracle iStore JSPs.

As a prerequisite, ensure you have a UNIX account and access to the OA_HTML directory.

Steps

1. In the Customer UI, navigate to a page containing message text. For example, navigate to the Site Home Page (ibeCZzpHome.jsp) that displays the Welcome Bin.
2. From the browser menu bar choose View > Source.
3. Search for the text you wish to locate.
4. In the source file, search for the JSP that correlates to the bin containing the associated message.
 - For example, the Welcome text is found in the ibeCAcdWelcome.jsp.
5. Log onto the application server and navigate to the OA_HTML directory. Once here, do a search for the `ibe*.jsp` that you are looking for.
 - In the Welcome example, locate `ibeCAcdWelcome.jsp`.
6. Open the JSP file and locate the AOL Message Name that correlates to the text you

are looking for.

- In the Welcome example, the AOL Message name is IBE_PRMT_Welcome_G.
7. Modify the message if desired, using the steps in the section, "Modifying Text Messages", in this chapter.

Translating Message Text

Specialty site text messages, prompts, and labels can be translated into multiple languages. If you have properly installed and implemented multiple languages, the seeded content will be translated automatically. However, if you have modified the seeded messages, then you will need to manually translate the text, prompt, or label.

For example, the Welcome Bin has the default text in American English -- *Welcome*. If Spanish has been properly implemented as an additional language, then the seeded text *Welcome* is automatically translated to *Bienvenido* in the Spanish site. If the seeded content has been altered, then the translation will not happen automatically and must be configured manually.

Site-Specific Messaging

In addition to translating messages and customizing default text for messages, you can also display different messages for particular types of sites. For example, a single Oracle iStore implementation may have three different sites that are active. In this example, one of the three sites is a B2B site which allows customers to place an order by faxing a purchase order. The other two sites are B2C sites and do not accept purchase orders. The B2B site, then, must have a specific text message that communicates this functionality in the Customer Application.

In Oracle iStore it is possible to map specific messages to specific sites using the Site Administration Application's media object functionality. The site-specific message is created and saved as an HTML file. Then, the new message (HTML file) is added as a source file for a media object and mapped to a particular site using the Site Administration Application.

See also: the chapter, Implementing Content, page 10-1

Creating Custom Site Messages

You can add custom messages for sites using the Oracle Applications Message Dictionary, the Oracle iStore media objects functionality, and the Java API `DisplayManager.getTextMediaOrFndMsg()`.

Prerequisites

- Create an HTML file with the desired text message.

- If you are storing your media source files in the file system, place the HTML file in the /OA_MEDIA directory.
- If you are storing your media source files in the database, upload the HTML file to the database or place it in your local directory for upload during the procedure.

Steps

1. Create the default message in Oracle Applications Message Dictionary as follows:
 - Log in to Oracle Forms with the Application Developer responsibility.
 - Choose Application, then Messages. The Messages window opens.
 - Create a new message. The Oracle convention for an Oracle iStore message name begins the name with IBE.
 - Create translations if necessary.
 - Save the message.
2. In Oracle iStore, create a media object with the same programmatic access name as the Oracle Applications Message Dictionary message name. See the chapter, Implementing Content, page 10-1, for instructions.
3. Add the HTML source file to the media object as described in the "Implementing Content" chapter. Use the following guidelines:
 - Map the HTML file to the specialty site where you want it to appear.
 - Do not set the HTML file as the default source file.
4. In the JSP that should display the message, use the `DisplayManager.getTextMediaOrFndMsg()` API to call the message.

For example, if the message name is IBE_STORE_WELCOME and you want to display it in your sites' home pages (`ibeCZzpHome.jsp`), you would add the following API call in the common section page, `ibeCCtdCmnSt.jsp`:

```
DisplayManager.getTextMediaOrFndMsg("IBE_STORE_WELCOME")
```

You can use the "get msg" API in any JSP that is not a processing page, using the programmatic name of the message from Forms.

Custom Text Message Placeholders

Oracle iStore supplies placeholders on the shipping, billing, order review/confirmation, and shopping cart pages of the Customer Application which implementers can use to supply custom text for customers.

To use the custom prompt placeholders:

- Create a new media object of Message type, using the programmatic access name of the custom text prompt. Instructions for this procedure can be found in the chapter, *Implementing Content*, page 10-1.
- Or, create an Oracle Application Object Library (FND) message using the programmatic access name of the custom text prompt. To get started on this procedure, see the section, "Site Text Messages Overview", in this chapter.

The following table lists selected custom text placeholders supplied for the shipping, billing, order review/confirmation, and shopping cart pages.

Selected Custom Text Placeholders for Customer Application

Programmatic Access Name	Description
IBE_PRMT_ENDTCA_CSTM_MSG1	Custom prompt on B2B end customer search page
IBE_PRMT_ENDTCA_CSTM_MSG2	Custom prompt on B2B end customer contact search page
IBE_PRMT_ENDTCA_CSTM_MSG3	Custom prompt on B2B end customer address search page
IBE_PRMT_SHP_CSTM_MSG1	Custom prompt on B2B Shipping (ibeCCKdBHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG2	Custom prompt on B2B Shipping (ibeCCKdBHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG5	Custom prompt on B2B Shipping (ibeCCKdBHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG6	Custom prompt on B2B Shipping (ibeCCKdBHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG7	Custom prompt on B2B Shipping (ibeCCKdBHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG1	Custom prompt on B2C Shipping (ibeCCKdCHdrShip.jsp) page

Programmatic Access Name	Description
IBE_PRMT_SHP_CSTM_MSG2	Custom prompt on B2C Shipping (ibeCCkdCHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG3	Custom prompt on B2C Shipping (ibeCCkdCHdrShip.jsp) page
IBE_PRMT_SHP_CSTM_MSG4	Custom prompt on B2C Shipping (ibeCCkdCHdrShip.jsp) page
IBE_PRMT_BIL_CSTM_MSG1	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG9	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG10	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG11	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG14	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG12	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG13	Custom prompt on B2B Billing (ibeCCkdBHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG1	Custom prompt on B2C Billing (ibeCCkdCHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG4	Custom prompt on B2C Billing (ibeCCkdCHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG6	Custom prompt on B2C Billing (ibeCCkdCHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG14	Custom prompt on B2C Billing (ibeCCkdCHdrBillPay.jsp) page

Programmatic Access Name	Description
IBE_PRMT_BIL_CSTM_MSG7	Custom prompt on B2C Billing (ibeCCkdCHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG8	Custom prompt on B2C Billing (ibeCCkdCHdrBillPay.jsp) page
IBE_PRMT_BIL_CSTM_MSG2	Custom prompt on Billing - Payment Options (ibeCPmdPmtOptions.jsp) page
IBE_PRMT_BIL_CSTM_MSG3	Custom prompt on Billing - Payment Options (ibeCPmdPmtOptions.jsp) page
IBE_PRMT_ORD_NEW_CREDIT_CARD	Custom prompt on Billing - Payment Options (ibeCPmdPmtOptions.jsp) page
IBE_PRMT_PMTBK_FAX_CC_MSG	Custom prompt on Billing - Payment Options (ibeCPmdPmtOptions.jsp) page
IBE_PRMT_PMTBK_PO_MSG	Custom prompt on Billing - Payment Options (ibeCPmdPmtOptions.jsp) page
IBE_PRMT_ORD_CSTM_MSG1	Custom prompt on Order Review (ibeCCkdOrdReview.jsp) page
IBE_PRMT_ORDSUM_CSTM_MSG1	Custom prompt on Order Confirmation (ibeCCkdOrdSummary.jsp) page
IBE_PRMT_CRT_CSTM_MSG1	Custom prompt on Shopping Cart (ibeCScdShowCartSummary.jsp) page
IBE_PRMT_CRT_CSTM_MSG2	Custom prompt on Shopping Cart (ibeCScdShowCartSummary.jsp) page
IBE_PRMT_CRT_CSTM_MSG3	Custom prompt on Shopping Cart (ibeCScdViewA.jsp) page
IBE_PRMT_ORD_FLEX_DESCR	Custom prompt on Shopping Cart (ibeCScdViewA.jsp) page
IBE_PRMT_SHPTCA_CSTM_MSG1	Custom Prompt on B2B Ship to Customer Search (ibeCCkdSearchCust.jsp) page

Programmatic Access Name	Description
IBE_PRMT_BILTCA_CSTM_MSG1	Custom Prompt on B2B Billto Customer Search (ibeCCKdSearchCust.jsp) page
IBE_PRMT_SHPTCA_CSTM_MSG2	Custom Prompt on B2B Shipto Contact Search (ibeCCKdSearchCntct.jsp) page
IBE_PRMT_BILTCA_CSTM_MSG2	Custom Prompt on B2B Billto Contact Search (ibeCCKdSearchCntct.jsp) page
IBE_PRMT_SHPTCA_CSTM_MSG3	Custom Prompt on B2B Shipto Address Search (ibeCCKdSearchAddr.jsp) page
IBE_PRMT_BILTCA_CSTM_MSG3	Custom Prompt on B2B Billto Address Search (ibeCCKdSearchAddr.jsp) page
IBE_PRMT_SCART_CSTM_MSG1	Custom Prompt on View Saved Cart (ibeCScdViewS.jsp) page *
IBE_PRMT_SQUOTE_CSTM_MSG1	Custom Prompt on View Saved Quote (ibeCScdViewQ.jsp) page *
IBE_PRMT_SHCART_CSTM_MSG1	Custom Prompt on View Shared Cart (ibeCScdViewSharedCart.jsp) page *
IBE_PRMT_SHQUOTE_CSTM_MSG1	Custom Prompt on View Shared Quote (ibeCScdViewSharedQuote.jsp) page *

* These prompts display only if the cart/quote are updateable by the user.

Self-Service Login Assistance Messages

The prompts in the Login and Password Assistance page are seeded Oracle Applications Message Dictionary messages. Oracle iStore also uses Oracle Applications Message Dictionary messages when it sends an e-mail with a customer's login information after the customer uses self-service login assistance. These messages are listed in the following table.

The following table, Self-Service Login Assistance Messages, shows the Self-Service Login Assistance messages that are seeded in the Customer UI.

Self-Service Login Assistance Messages

Message Name	Description	Seeded Text
IBE_PWD_EMAIL_BODY	The body of the e-mail sent to users with their login information	<p>Dear &0,</p> <p>You are receiving this email because we recently received a request to e-mail your login information to you.</p> <p>You do not have to respond to or act on this email.</p> <p>Your account details are given below:</p> <p>Username: &1</p> <p>Password: &2</p> <p>As a security measure you should change your password immediately after logging on.</p> <p>IMPORTANT: Do not reply to this email. If you need to contact us, send an email to storehelpers_us@oracle.com.</p> <p>We appreciate your interest with us.</p> <p>Customer Care</p>
IBE_PWD_EMAIL_SUBJECT	The subject line of the e-mail sent to users with their login information	Login information assistance
IBE_PWD_HELP_FOOTER	Tells customers who to contact for additional help	<p>If you need additional help regarding your login information, feel free to send email to storehelpers_us@oracle.com. We will be happy to assist you.</p>

Message Name	Description	Seeded Text
	The strings preceded by an ampersand (&) are dynamically replaced with user-specific information by Oracle iStore.	

You must modify the messages IBE_PWD_EMAIL_BODY and IBE_PWD_HELP_FOOTER to change the seeded e-mail address storehelpers_us@oracle.com to your own site administrator's e-mail address.

Modifying Oracle Application Object Library Lookups

Oracle Application Object Library lookups (FND_LOOKUPS) provide some of the lists of values in the Customer UI and the Site Administration UI. You can change the values of the names and descriptions for these lookups by using the following procedure.

Information about the seeded lookups can be found later in this section.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility.
2. Navigate to Application, Lookups, Application Object Library. The Application Object Library Lookups window opens.
3. Choose View, then Find. The Lookup Types search window opens.
4. Query for the lookup which you are modifying.
5. In each row of the Application Object Library Lookups window, you can add a lookup code as follows:
 - In the Code field, enter the lookup code.
 - In the Meaning field, enter a meaning for the lookup code.
 - In the Description field, enter a description for the lookup code. This is the description that will show up in the Customer UI drop down list.
 - Optional: In the From and To fields, select the effective dates for the lookup code.
 - Check the Enabled checkbox.

6. Save the form.

Disabling Lookups

To disable a lookup code, end date it and uncheck the Enable flag for the code.

Sales Assistance Reasons Lookups

Customers can request help from a sales representative through iStore's Sales Assistance feature. You can use AOL to activate and set up the list of reasons for needing assistance that customers choose from when using the Sales Assistance feature. You accomplish this by setting up lookup codes with meanings for the AOL lookup type `ASO_SALESREP_ASSISTANCE_REASON`.

The following table shows the seeded Sales Assistance Prompts.

Oracle iStore Sales Assistance Seeded Prompts

Message Name	UI Prompt Content
IBE_SA_FIN_OPTIONS	Financing Options
IBE_SA_MORE_PRODUCT_INFO	More Product Info
IBE_SA_OTHERS	Others
IBE_SA_PRODUCT_AVAIL	Product Availability
SA_TANDC	Terms and Conditions

For more information on Oracle iStore's Sales Assistance feature, see the chapter, *Implementing Customer Assistance*, page 15-1.

Share Cart Roles Lookups

Site administrators can change the seeded names and descriptions for shared cart roles. You accomplish this by changing lookup codes with meanings for the AOL lookup type, `IBE_QUOTE_UPDATE_PRIVILEGE`. The seeded values are:

- Administrator
- Viewer
- Participant

See the chapter, *Implementing Carts and Orders*, page 13-1, for more information.

Media Objects and Content Components Classes Lookups

Site administrators can change the class designations for the media objects and content components in the Site Administration UI. To do this, you must modify the lookup, `IBE_M_MEDIA_OBJECT_APPLI_TO`.

The following table, *Seeded Media Object and Content Component Classes*, shows the seeded classes for these items:

Seeded Media Object and Content Component Classes

Access Level Name	Description
Product	For media objects or components applicable to product display
Section	For media objects or components applicable to section display
Section and Product	For media objects or components applicable to section and product display
Message	For media objects applicable to message display
Logo	For media objects applicable to logo display
Others	For all other classes

Site Group Names Lookup

Oracle iStore's site management functionality allows you to categorize specialty sites into groups. The specialty sites then display in the Site Selection Page according to the group(s) in which they belong. The names of the groups are extensible lookups which you can alter according to your business needs. You also can disable the groups. To do this, you must modify the lookup, `IBE_M_SITE_GROUP`.

When you create a new group lookup or alter an existing group lookup in Oracle Forms, the changes appear immediately in the Store Administration UI, but you need to bounce the server for the changes to be visible in the Customer UI.

The following table shows the seeded groups:

Site Group Names

Site Group Name	Description
Store Sites	A group for Oracle iStore specialty sites
Support Sites	A group for Oracle iSupport specialty sites
Partner Sites	A group for Oracle Partner Management specialty sites

Returns Reasons Lookup

In Oracle iStore's Returns pages, you can modify the LOV that displays the reasons a user is returning an order. The name of the Return Reasons lookup is IBE_RETURN_REASONS_LOOKUP.

The seeded reasons are:

- Damaged Product
- Wrong Product

Important: When entering new lookup values, you must use values that exist in the lookup, CREDIT_MEMO_REASON. This is an Oracle Receivables lookup. If you do not use one of these values, and a user submits a return using an invalid reason, the return will fail.

You also can modify the values displayed in the Returns search mechanism. See the section, "Order Tracker Search Lookups", below.

Order Tracker Search Lookups

In Order Tracker's Track Orders page, the search utility lookup is displays as Orders in Last Days. The same lookup is used for Orders, Invoices, Payments, and Returns queries.

Following is the data:

- **Lookup Name:** IBE_QUERY_ORDERS_RANGE_LOOKUP
- **Description:** Lookup for defining data range to query orders
- **Values:** 7, 14, 30, 60, 90 days

- **Default value:** 7 days

Note that the search will default to the lookup's first entered value.

If you have set up values with decimals, Oracle iStore rounds off this value before displaying the results. For example, 1.5 would be treated as 1 and search results would be returned for 1 day.

Advanced Search Status Lookups

In the Advanced Search page of Order Tracker, the Status field can be displayed either at the item or order level. This display is accomplished by selecting either Orders or Items in the Search By list.

In the Invoices page of Order Tracker, the iStore user can select the Type and the Contains item from the Search By list. Enter credit in the Search field and click on the Go button to view the credit memo in the Type column.

Status Lookup for Orders

The lookup for the Status field, when Orders is selected in the Search by LOV, is: IBE_ORDER_STATUS_SEARCH_PARAMETERS. The seeded lookup values are:

- Entered
- Booked
- Cancelled
- Closed

Status Lookup for Items

The lookup for the Status field, when Items is selected in the Search by LOV, is: IBE_LINE_STATUS_SEARCH_PARAMETERS. The seeded lookup values are:

- Entered
- Booked
- Cancelled
- Closed
- Awaiting Shipping
- Awaiting Return
- Awaiting Fulfillment

- Fulfilled
- Invoiced
- Picked
- Scheduled
- Shipped

Important: If you modify these values, be sure to enter the same values in the Oracle Order Management lookups that store order statuses. These are `FLOW_STATUS`, the lookup for order header statuses; and `LINE_FLOW_STATUS`, the lookup for order line statuses. To view/alter these statuses, navigate to Setup: Quick Codes in the Order Management Super User menu.

View By Customer Orders in Order Tracker Lookup

The lookup associated with the profile, IBE: View-By Customer Orders in Order Tracker, is `IBE_OT_VIEWBY_CUST_ORDERS`.

User Type Lookups

The lookups for user types are shown below. These lookups effect the display of the links in the user type listing Registration page. Each main lookup has two or more child lookups within it.

B2C User Types

- **IBE_UM_INDIVIDUAL_USER_TYPES:** These lookups are for individual (B2C) user types.
 - `IBE_INDIVIDUAL` (for iStore B2C users)
 - `IBE_INDIVIDUAL_PARTIAL` (for iStore B2C users for Online Access to Existing Account functionality)
 - `IBU_INDIVIDUAL` (for iSupport B2C users)

B2B User Types

- **IBE_UM_STORE_USER_TYPES:** These lookups are for individual (B2B) user types.
 - `IBE_BUSINESS` (for iStore regular B2B users)
 - `IBE_BUSINESS_PARTIAL` (for iStore B2B Online Access to Existing Account users)

- IBE_PRIMARY (for iStore primary users)
- IBU_BUSINESS (for iSupport regular B2B users)
- IBU_BUSINESS_PARTIAL (for iSupport B2B Online Access to Existing Account users)
- IBU_PRIMARY (for iSupport primary users)

Non-Administrative B2B and Partner User Types

- **IBE_UM_SECONDARY_USER_TYPES:** These lookups are for non-administrative business (B2B) user types and user types to register Oracle Partner Management non-administrative users.
 - IBE_BUSINESS (for iStore regular B2B users)
 - IBE_BUSINESS_PARTIAL (for iStore regular B2B user for Online Access to Existing Account functionalities)
 - IBE_PARTNER_BUSINESS (for Partner Management regular users)

Primary B2B and Partner User Types

- **IBE_UM_PRIMARY_USER_TYPES:** These lookups are for primary (administrative) business (B2B) user types and user types to register Oracle Partner Management primary users.
 - IBE_PRIMARY (for iStore primary users)
 - IBE_PARTNER_PRIMARY (for Partner Management primary users)

Partner User Types

- **IBE_UM_PARTNER_USER_TYPES:** These lookups are for Oracle Partner Management users.
 - IBE_PARTNER_BUSINESS (for B2B partners, non-administrative)
 - IBE_PARTNER_PRIMARY (for B2B primary user partners)
 - IBU_BUSINESS_PARTNER (for iSupport B2B partners, non-administrative)

Partial Registration User Types

- **IBE_UM_PARTIAL_USER_TYPES:** These lookups are for user types registering with Online Access to Existing Account functionality.
 - IBE_BUSINESS_PARTIAL (for B2B Online Access to Existing Account users)
 - IBE_INDIVIDUAL_PARTIAL (for B2C Online Access to Existing Account users)

- **IBU_BUSINESS_PARTIAL** (for iSupport B2B Online Access to Existing Account users)
- **IBU_INDIVIDUAL_PARTIAL** (for iSupport B2C Online Access to Existing Account users)

See the chapter, *Implementing User Management*, page 14-1, for more information.

Search Engine Indexing Lookups

Oracle iStore seeds the names of popular Web crawler user agents in the lookup, `IBE_SEARCH_ENGINE_USER_AGENTS`. The seeded values are:

- **Google:** googlebot
- **MSN:** msnbot
- **Yahoo:** slurp
- **Ask Jeeves:** Teoma
- **Altavista:** Scooter

For more information, see the "Search Engine Indexing" section in the chapter, *Implementing Miscellaneous Internet-Related Features*, page 18-1.

Implementing Globalization and Multi-Org Architecture

This chapter covers the following topics:

- Overview of Implementing Globalization and Multi-Org Architecture Chapter
- Overview of Globalization and Multiple Organization Architecture
- Oracle iStore Key Global Features and Benefits
- Implementing Globalization with Oracle iStore

Overview of Implementing Globalization and Multi-Org Architecture Chapter

This chapter describes how to implement Oracle iStore in a global instance.

Overview of Globalization and Multiple Organization Architecture

A global implementation of your Oracle Applications enables you to do business in multiple countries, languages, and currencies. Leveraging Oracle Multiple Organization Architecture ("multi-org"), a global implementation allows you to:

- Create multiple sets of books, each with its own unique calendar, chart of accounts, and functional currency. Each set of books then can be tied to a sub-organization of your master organization, and to separate legal entities.
- Sell Inventory from one legal entity (which uses one set of books) and ship them from another legal entity (using a different set of books). Oracle Receivables can automatically record the appropriate intercompany sales by posting intercompany accounts payable and accounts receivable invoices.
- Reuse database tables, meaning one-time data entry.

- Ability to segregate transactions by operating unit -- since each organization is uniquely linked to an operating unit -- yet still share certain information (such as customers) between organizations.
- Support multiple currencies (including the Euro) and several languages.

For Oracle Applications multi-org information, see *Multiple Organizations in Oracle Applications*.

Oracle iStore Key Global Features and Benefits

Oracle iStore is fully equipped to support a global deployment by offering --- in addition to the multi-org architecture benefits discussed above --- several features and benefits that can enable you to present a world-wide web presence. Some of these features and benefits include:

- After assigning responsibilities to an operating unit, the ability to limit user purchases to one operating unit's set of books.
- Online specialty sites in multiple languages and currencies.
- Ability to offer translated product data and site prompts.
- Support for regional payment type availability.
- Restriction of bill-to and ship-to countries for each operating unit.
- Localization of product catalogs and inventory.
- Support for regional tax requirements, payment types, and shipping methods.

Implementing Globalization with Oracle iStore

The following are the steps to successfully implement globalized specialty sites using Oracle iStore:

1. Step 1 - Implement Oracle Multiple Organization Architecture
2. Step 2 - Install Languages and Currencies
3. Step 3 - Set up Oracle iStore Customer Application Responsibilities
4. Step 4 - Create Global Sites
5. Step 5 - Translate Product Descriptions
6. Step 6 - Enable Global Currencies and Price Lists

7. Step 7 - Set up Global Customer Application
8. Step 8 - Use Global Address Formats
9. Step 9 - Ensure Display of Localized Quantities

Step 1 - Implement Oracle Multiple Organization Architecture

A global implementation of Oracle iStore requires that iStore's mandatory dependencies be implemented using Oracle Multiple Organization Architecture. Oracle iStore relies on the schema supplied by these applications for much of its back-office global functionality.

For Oracle Applications multi-org information, see *Multiple Organizations in Oracle Applications*.

Step 2 - Install Languages and Currencies

You can set up multiple sites (all within a single instance), each deploying a different currency and language. Oracle iStore supports all of the currencies that the Oracle E-Business Suite supports, including the Euro. Through its integration with Oracle Applications, each specialty site also can display appropriate currency symbols.

Languages and currencies are enabled in the Oracle Application Object Library (AOL) module during setup. After initially enabling languages in AOL, you set them up in Oracle General Ledger.

A web customer's preference, as defined in his Oracle iStore user profile, determines which currency and language is used for a specialty site, unless a customer explicitly selects a specialty site in a particular language. The preferred language is stored in the HZ_PERSON_LANGUAGE table. Initially, the language is the one defaulted during registration from the user's session language.

To install multiple languages and currencies see: *Oracle E-Business Suite Multiple Organizations Implementation Guide*.

To enable the currencies that your sites will support, see: *Oracle General Ledger User Guide*

Step 3 - Set up Oracle iStore Customer Application Responsibilities

Each site supports multiple responsibilities, and each iteration of a site and a responsibility make a specialty site accessible in the Customer UI. It is recommended that you set up your sites to each support a single responsibility (and thus a single specialty site). This single specialty site then can be rendered in different languages and currencies.

When a user's registration is approved, he is granted at least one responsibility. A match between a customer's responsibility and the responsibility supported by a site

allows the customer to see the specialty site. Oracle iStore seeds a default responsibility, IBE_CUSTOMER, for use with your sites.

The operating unit (OU) tied to the responsibility a customer is using when he places an order determines the OU in which the order is recorded. In a multiple-OU scenario, you would create a separate IBE customer responsibility to link to different OUs. The OU associated with a customer when he places an order is determined by the settings of two multi-org profile options, as discussed in the following use cases.

Use Case 1: Multi-Org Implemented; MO: Security Profile Set to Single OU

MO: Security Profile is set to a single OU at Oracle iStore customer responsibility level. Sites using this customer responsibility are associated to the specified OU, and all the transactions are placed in this OU. In this case, the profile, MO: Operating Unit, should be set to the same OU as in the security profile.

Use Case 2: Multi-Org Implemented; MO: Security Profile Set to Multiple OUs

MO: Security Profile is set to multiple OUs, either through security profile hierarchy or to a list of valid OUs defined in Oracle Human Resources. Oracle iStore will retrieve the OU associated to the site/responsibility based on the value defined in the profile option, MO: Operating Unit. This profile option is required and should be set to a single OU. The OU associated to the Oracle iStore customer responsibility through MO: Operating Unit should be one of the OUs in the list of operating units associated to MO: Security Profile. Note that the Security Profile should list all the OUs that are used in iStore as well as those in used in Oracle Order Management/OrderCapture products; this is required in order for the iStore end user to be able to cancel orders.

Use Case 3: Multi-Org Not Implemented

MO: Security Profile is not set. MO: Operating Unit is set to one OU for each Oracle iStore Customer UI responsibility. Oracle iStore will retrieve the OU associated to the site/responsibility based on the value defined for this profile option.

Oracle iSupport and Oracle Partner Management applications should follow the same logic when using the iStore framework to create their sites.

When a customer enters a specialty site, Oracle iStore notes the customer's responsibility and the OU to which it is assigned, then restricts the customer to the items in the Inventory Organization that is associated with the OU. Oracle iStore accomplishes this by retrieving the Inventory Organization ID for the current user responsibility's OU from the OE_SYSTEM_PARAMETERS_ALL table. Use Oracle Order Management to associate Inventory Organization IDs with OUs.

Note: In all cases, the profile option, MO: Operating Unit, must be set.

Sample Responsibilities Setup for Oracle iStore Multi-Org

Following is a sample responsibilities setup for a multi-org implementation:

1. Create a separate responsibility for each operating unit. You can use the seeded responsibility, IBE_CUSTOMER, as one of these responsibilities. Each operating

unit must be tied uniquely to a single responsibility.

Example: Create IBE_CUSTOMER_G for your German operating unit, and use IBE_CUSTOMER for your U.S. operating unit.

2. Link each responsibility to an operating unit by setting the multi-org profile options discussed in the above section.

Single-Org Express Checkout Concurrent Program

The iStore - Express Checkout Order Submission concurrent program, which converts the Express Checkout shopping carts into orders, is marked as single-organization concurrent program. In a multi-org environment, when you run the concurrent program, the system will prompt you to select a single organization from a list of accessible organizations. Choose one of the organizations from the list and run the concurrent program. The system will submit all Express Checkout shopping carts that belong to the selected organization as orders.

Step 4 - Create Global Sites

Using the Oracle iStore Site Administration UI, create a new site for each responsibility, and link each site with its responsibility. See the chapter, *Implementing Site Management*, page 5-1, for more information.

Step 5 - Translate Product Descriptions

See the section, "Translating Product Descriptions", in the chapter, *Implementing Products*, page 7-1, for details.

Step 6 - Enable Global Currencies and Price Lists

Oracle iStore supports all of the currencies supported across the Oracle E-Business Suite, including the Euro, and supports multiple-currency price lists. See the chapter, *Implementing Pricing*, page 11-1, for more information.

Step 7 - Set up Global Customer Application

All of the pages in Oracle iStore's Customer Application are made up of Display Templates mapped to specific JSP files. Within each template your implementation can support various content (.htm files, images) through the use of content components and media objects. In addition, hundreds of seeded text messages display in the UI. For a list of seeded Display Templates, bins, and media objects see the chapter, *Seeded Display*, page C-1. You can find a partial list of seeded text messages in the chapter, *Implementing Messages and Prompts*, page 16-1.

Map New JSPs

In a multiple-language implementation, you must set up JSP files in the other (non-base) languages and then map the JSPs to the programmatic access names of each Display Template. See the chapter, *Implementing the Catalog*, page 9-1, for additional information.

Set up Content

For content, similarly, you must provide content for the other languages and map them to the content components or media objects. See the chapter, *Implementing Content*, page 10-1, for additional information.

Set up Text Messages

All seeded specialty site text messages, such as prompts and labels, are stored in Oracle Applications Message Dictionary. If a global site continues to use the seeded text for messages and prompts, these the seeded text will automatically be translated when the additional languages are installed. However, if alternate messages text is created, then the merchant will need to manually translate the content. See the chapter, *Implementing Messages and Prompts*, page 16-1, for more information.

Set Oracle Quoting Parameters

Set the following Oracle Quoting parameters: Default Salesrep, Default Contract Template ID, and Default Order Type. For more information, see the "Oracle Quoting Integration Parameters" topic in the appendix, *Profile Options*, page A-1.

Step 8 - Use Global Address Formats

Through its integration with Oracle E-Business Tax, Oracle iStore can provide address entry formats specific to particular countries. This allows the application to dynamically provide Address Book data entry formats based on the country selected by the user.

For more information on setting up and using Oracle E-Business Tax, see the *Oracle E-Business Tax Implementation Guide* and the *Oracle E-Business Tax User Guide*.

Step 9 - Ensure Display of Localized Quantities

Oracle iStore supports displaying the different quantity formats used by various languages around the world. Some languages, for example, show the quantity "one thousand" as 1,000, while others show this same quantity as 1.000. As of Release 11.5.10, Oracle iStore supports localized quantity formats, using the language of a specialty site to automatically derive the localization convention. No setup is required for quantity localization. However, merchants using Oracle iStore Release 11.5.10 with customized, pre-Release 11.5.10 Customer UI pages may experience localized quantity display issues.

This issue affects only those implementing Release 11.5.10 who are continuing to use the pre-existing (pre-R11.5.10) customized JSP pages/templates shown below.

JSP Files/Templates Affected

The localized quantity support changes in Oracle iStore R11.5.10 code will cause unexpected behavior when the user interacts with the following pages:

1. Modify shopping cart process page.
 - Template name --- STORE_CART_MODIFY_P
 - JSP name --- ibeCScpViewA.jsp
2. Display model item lines page
 - Template name --- STORE_CART_MDL_ITEM_LINES
 - JSP name --- ibeCScdMdllItemLines.jsp
3. Modify line level shipping details process page
 - Template name --- STORE_CART_LINE_SPLIT_DETAILS_P
 - JSP name --- ibeCCkpLineSplit.jsp
4. Add bundle, add education, or add bundle with education page
 - Template name --- STORE_CART_BUNDL_EDUC_P
 - JSP name --- ibeCScpBundEduc.jsp
5. Add to Cart JSP --- This one is not a template, but a JSP file only. It is included by other JSPs and is not expected to be customized.
 - JSP name --- ibeCScpAddToCart.jsp

Remember that these pages are used in many flows for shopping carts, and hence a customer may encounter problems in many flows if these pages are not adjusted.

Examples of How the Issue May Appear

Following are examples of how the quantity localization issue may show up in the Customer UI:

- If the user enters 1 , 5 as quantity in a German-language specialty site, some of the JSPs above will show an invalid quantity error message to the user.
- If the user enters 1500 . 00 as quantity in a German-language specialty site, it will

be interpreted as 150000, which may not be what the customer was expecting to see --- he may have been expecting the display in English notation.

Note that this localization issue does not affect the display of prices in the Customer UI.

Altering Customized JSP Files up to Support Localization

To address this issue, Oracle iStore implementers can modify the JSP files listed above to include a call to consider the specialty site language before displaying quantities. The class, `oracle.apps.ibe.util.NumFormat`, which supports parsing and formatting numbers given any language. In essence, the JSPs listed above must be altered to use the `NumFormat` class to parse and format quantities.

In validating quantities in the above JSPs, Oracle iStore validates quantity using this logic:

1. Convert quantity entered by user to `BigDecimal`.
2. Check if the quantity is a valid number in the situation (e.g., it must be greater than zero, etc.).

For step 1, the code would typically be in the form:

```
BigDecimal quantity = new BigDecimal(request.getParameter  
("..."));
```

This should now be changed to:

```
NumFormat format = new NumFormat(RequestCtx.getLanguageCode());  
BigDecimal quantity = format.parseNumber(request.getParameter  
("..."));
```

Implementing Miscellaneous Internet-Related Features

This chapter covers the following topics:

- Overview of This Chapter
- Customer Application Page Caching
- Search Engine Indexing
- Secure Socket Layer Connections
- DeMilitarized Zone Environment Support

Overview of This Chapter

This chapter describes the implementation of various Internet-related features and functionality.

Customer Application Page Caching

This section describes the implementation and administration of caching Oracle iStore Web pages without the use of Oracle Application Server Web Cache 10g. Oracle iStore's integration with Oracle Application Server Web Cache 10g is described in the chapter, *Integrating Oracle iStore with Oracle Application Server Web Cache*, page 33-1.

Overview of Caching

Caching technology allows the storage and monitoring of web object (Java object) requests from a server. On subsequent requests for the same object, the cache delivers the object from its storage rather than passing the request on to the origin server. This increases the speed with which objects are retrieved, and thus speeds the performance of your web site.

Web objects change over time, so each web object has a useful life, or "freshness."

Caches determine whether or not their copy of an object is still "fresh," or whether they need to retrieve a new copy from the origin server. The higher the number of people requesting the same object during its useful life, the more upstream traffic the cache eliminates. By handling object requests rather than passing them upstream to the origin server, caches reduce network traffic and improve the browsing experience for users.

Overview of Cached Data in Oracle iStore

You can set up Oracle iStore to rely on Oracle CRM Technology Foundation (JTT) Cache to cache your specialty site page objects.

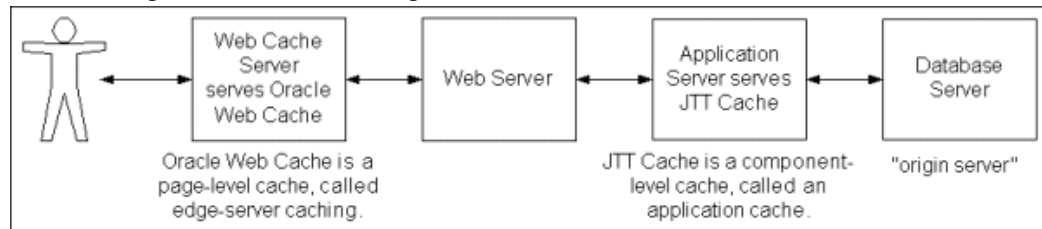
Note: Oracle iStore no longer supports the use of IBE Cache. You should use JTT Cache. For details on how to set up JTT Cache, see the Oracle E-Business Suite CRM System Administrator's Guide.

You also can integrate Oracle iStore with Oracle Application Server Web Cache to serve cached data. See the chapter, Integrating Oracle iStore with Oracle Application Server Web Cache, page 33-1, for more information.

JTT Cache is a component-level cache known as an application cache. Oracle Web Cache is a page-level cache known as edge-server caching. These two types of caches do not interconnect in any way.

The following diagram explains the relationship between JTT Cache and Oracle Web Cache. The diagram depicts how when a user requests an object from a web page, the edge-server cache and application server cache deliver the objects to the page. If the cached data is not available, the system retrieves the objects from the origin server.

Web Caching in Oracle iStore, using Oracle Web Cache and JTT Cache



Setting up JTT Cache

Oracle iStore can use the Oracle CRM Technology Foundation (JTT) Cache to improve site performance.

Component Caches for Oracle iStore in JTT

JTT Cache framework manages caches in two levels: component level and object level. A cache component is a collection of cached objects of the same type. Each cache component holds all the Java objects associated to an application. For example, IBE_SECTION_CACHE component contains all cached section objects, while

IBE_ITEM_CACHE contains all item (product) objects.

Each application uses one or more component caches. Within each component cache, are component identifiers. Cached objects, which are striped by unique keys, are used almost everywhere in JSPs and Java classes. Where these objects are used is fully determined by business logic and the underlying implementation.

The following table shows the JTT component cache identifiers that are seeded in Oracle iStore. The table lists the Oracle iStore component identifier (component cache) and the what each identifier caches.

Oracle iStore Component Caches

iStore Component Identifier	What it Caches
IBE_ACCESSNAMEID_CTX_CACHE	Stores programmatic access names of the display styles' logical IDs
IBE_ADDRESS_VALIDATION_CACHE	Stores address validation status for each operating unit
IBE_ATTACHMENT_CACHE	Stores attachment information
IBE_CURRENCY_CACHE	Stores currency information, including currency symbol and translated currency names
IBE_FND_LOOKUP_CACHE	Stores FND lookup values based on language -- the key is the column lookup_code (in FND_LOOKUP_VALUES) and the return value is the meaning column containing the actual phrase (e.g. shipping method).
IBE_INVORG_SHPMTHD_CACHE	Stores shipping methods based on inventory organization ID
IBE_ITEM_CACHE	Item objects
IBE_ITEM_LANG_DESC_CACHE	Stores the language-specific description and language description of items in the catalog
IBE_ITEM_PRICE_CACHE	Stores prices of items in catalog.
IBE_LAYOUT_COMPONENT_TEMPLATE_CACHE	Stores the template mapped to a section in a specific component of the layout

iStore Component Identifier	What it Caches
IBE_LOCALE_CACHE	Stores the locale for a given language
IBE_MEDIA_CACHE	Stores logical name to physical file mapping for content components
IBE_MEDIA_CTGCTX_CACHE	Stores the context of content components for product categories
IBE_MEDIA_DEFAULT_CACHE	Stores the context of default content components
IBE_MEDIA_PRDCTX_CACHE	Stores the context of content components for products and sections
IBE_MEDIA_TEXT_CACHE	Stores text media (i.e., Oracle Application Object Library messages)
IBE_MENU_CACHE	Stores iStore Customer UI menus retrieved from FND
IBE_MSITE_AN_CACHE	Specialty site object by access name
IBE_MSITE_ID_CACHE	Stores specialty site objects by Site ID
IBE_MSITE_RESP_CACHE	Stores the SortedMinisiteResponsibilities object where the key is the language code
IBE_OU_CACHE	Stores operating unit object, which stores information such as ship-to and bill-to countries
IBE_PARTNUM_CACHE	Stores part number and Inventory ID mapping
IBE_PHONE_CODE_CACHE	Stores international phone code of each country -- the key is the territory code and the return value is the international phone code
IBE_PRINTED_TAXNAME_CACHE	Stores printed tax names based on tax code, organization ID, and language code

iStore Component Identifier	What it Caches
IBE_RELATED_ITEM_PRICE_CACHE	Stores prices of the related items in the catalog.
IBE_SECTION_ACCESSNAME_CACHE	Stores mapping between a section's access name and its unique identifier.
IBE_SECTION_LANG_DESC_CACHE	Stores language-specific description and language description of sections in the catalog
IBE_QUOTE_STATUS_CACHE	Stores quote statuses
IBE_SEARCH_CATEG_CACHE	Stores category-level product search LOV in sites' menu bars
IBE_SEARCH_SECTION_CACHE	Stores section search cache for Customer UI
IBE_SECTION_CACHE	Stores section objects and navigational hierarchy
IBE_STORE_LANGUAGE	Stores the SiteLanguage object where the key is the language code
IBE_STORE_PROFILE_CACHE	Stores application-level profile option settings
IBE_STYLE_CACHE	Stores address style for each country
IBE_TEMPLATE_CACHE	Stores logical name to physical file mapping for templates
IBE_TEMPLATE_DEFAULT_CACHE	Stores default context of templates
IBE_TEMPLATE_PRDCTX_CACHE	Stores context of templates for products and categories
IBE_UOM_CACHE	Stores units of measure and their translations

For information on how to set up and use JTT Cache, see the *Oracle E-Business Suite CRM System Administrator's Guide*.

Search Engine Indexing

Oracle iStore supports the indexing of its public Customer Application pages by search engines. Oracle iStore public pages can be traversed and indexed by search engine Web crawlers. When the page URLs appear as part of a search result, users can navigate directly to the catalog page by clicking on the URL.

Indexing Behavior in Oracle iStore Customer Application

Each Oracle iStore catalog page has a "site context", which is a combination of site ID, responsibility ID, and language code. For Web crawler support, Oracle iStore encodes the site context within the catalog page. Oracle iStore identifies Web crawler visits by reading the user-agent string in HTTP request headers. Oracle iStore maintains a list of Web crawler user-agent strings that match the user-agent strings in request headers. This list is extensible to support additional Web crawlers.

Guidelines for Search Engine Indexing

Keep the following rules and guidelines in mind as you implement and use the feature:

- To improve ranking in search engine indices, the site context ID constituents (site, responsibility, language) are concatenated into one parameter, separated by a colon (:), and recognized as a new parameter. Users can store the encoded URL as a bookmark in their browsers.
- Oracle iStore recognizes Web crawler user agents; when it does, it will not perform a URL rewrite. A "URL rewrite" refers to the system action of generating URLs with encoded session information when session cookies cannot be set on the client machine.
- Oracle iStore seeds the names of popular web crawler user agents in a lookup. See the "Implementing Search Engine Indexing" section, below, and the Implementing Messages and Prompts chapter, page 16-1, for more information.
- Only pages not requiring login (public pages) will be indexed and returned as results by search engines.

Implementing Search Engine Indexing

Following are the high-level steps to implement search engine indexing:

1. Enable Search Engines in Lookup (optional)
2. Register Catalog Pages with Search Engine

Enable Search Engines in Lookup

The factor to determine whether a client is a Web crawler is based on the popular Web crawlers' identifier in the HTTP header. By default, Oracle iStore seeds the identifier for the following Web crawlers: Google (America Online uses Google), MSN, AskJeeves, and Yahoo. Implementers may support additional search engines by adding their user-agents to the Oracle Applications lookup. See the Implementing Messages and Prompts chapter, page 16-1, for more information.

Register Catalog Pages with Search Engine

In order for search engines to find Oracle iStore catalog pages, you must ensure that the pages are registered with the search engines to be used. Consult the product documentation for the specific search engines for more information.

Secure Socket Layer Connections

Secure Sockets Layer (SSL) is a protocol that allows the transmission of private documents via the Internet. SSL works by using a public key to encrypt data that's transferred over the SSL connection.

Both Netscape Navigator and Internet Explorer support SSL, and many web sites use the protocol to obtain confidential user information, such as credit card numbers. By convention, URLs that require an SSL connection start with `https:` instead of `http:`.

Oracle iStore provides support for serving pages through SSL network connections, and can switch seamlessly between HTTP and HTTPS protocol. This reduces the hardware required to serve Oracle iStore pages through SSL. It also provides improved performance with HTTP for non-secure Oracle iStore pages, such as the catalog pages.

Pages that are SSL-enabled are considered secure, while pages that are not served through SSL are considered non-secure.

Enabling SSL Switching

To enable protocol switching between secure and non-secure URLs, set the following mandatory profile options:

- IBE: iStore Secure URL --- Set to the base URL where HTTPS is installed.
- IBE: iStore Non Secure URL --- Set to the base URL where HTTP is installed. See the chapter, Integrating Oracle iStore with Oracle Application Server Web Cache, page 33-1, for information on Oracle Application Server Web Cache and SSL.

See the appendix, Profile Options, page A-1, appendix for more information about these profiles.

These URL parameters enable the application to recognize hostnames and ports. If you do not want to support protocol switching, leave the profiles blank.

When you set these profile options, hyperlinks that cause a transition from SSL to non-SSL and vice versa become absolute. Also, hyperlinks that are shared by both SSL and non-SSL pages become absolute. Absolute hyperlinks have the following HTML syntax:

```
<a href="http://<host>:<port>/OA_HTML/ibeCAcdLogin.jsp?a=b"></a>
```

In contrast, relative hyperlinks have the following syntax:

```
<a href="ibeCAcdLogin.jsp?a=b"></a>
```

Accessing the Database with a Private Middle Tier

Your support team may need to access the database using its own private middle tier. For example, if your HTTPS server is down for maintenance, the team may need this access to test other functionality. To allow access to the database with a private middle tier, you will need to make all hyperlinks relative.

You can make the hyperlinks relative by appending "?intra=t" to your Oracle iStore home page URL.

Use the following procedure to make the hyperlinks relative.

Steps

1. Navigate to the following URL:

```
http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?intra=t
```

2. The page opens. All hyperlinks are now relative to the following URL:

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

SSL and Non-SSL Enabled Pages in Oracle iStore

The following table summarizes which Oracle iStore components have SSL-enabled pages and which do not.

Oracle iStore Secure and Non-Secure Pages

SSL-Enabled Pages

- Login
- Cart Saving and Sharing
- Checkout Flow
- Express Checkout
- Customer Profile
- Order History

Non-SSL-Enabled Pages

- Catalog
 - Shopping Cart
-

Setting JTT JVM Cookie Parameters

If your HTTP and HTTPS servers are set up in different sub-domains and paths, two JVM parameters must be set in Oracle CRM Technology Foundation so that the session cookies are sent to both servers. The following are the parameters:

- `jtt_cookie_domain`
- `jtt_cookie_path`

Example:

If the HTTP server is `http://www.xyz.com/path1` and the HTTPS server is `https://secure.xyz.com/path2`, the JVM parameters should be set as follows:

- `jtt_cookie_domain=xyz.com`
- `jtt_cookie_path=/`

For instructions on how to set these parameters in the Oracle CRM System Administrator's Console, see the online help accessible from the console.

DeMilitarized Zone Environment Support

Oracle iStore is certified to be deployed in a DeMilitarized Zone (DMZ) environment. Deployment options, required patches, configuration details and other information are available in My Oracle Support Note 1375670.1.

Verifying the Implementation

This chapter covers the following topics:

- Verifying the Implementation
- Oracle iStore Implementation Verification Tasks

Verifying the Implementation

This chapter describes the tasks required to verify your implementation of Oracle iStore.

Oracle iStore Implementation Verification Tasks

Once you have launched your sites, you can continue to test and verify additional changes to the catalog before making the changes public.

Testing the Sites

Use the following procedure to test your specialty sites before launching them.

Prerequisites

A site has been created, and a supported iStore responsibility has been assigned to it.

Steps

1. Navigate to the Site Selection Page at the following URL: `http://<host>:<port>/OA_HTML/ibeCZzdMinisites.jsp`

If you are using the Site Selection Page, this page allows you to navigate to any of your specialty sites, and to sign in if necessary. If you are not using the Site Selection Page, you are automatically rerouted to the default specialty site or, if the default specialty site is not available to you, to the first specialty site you can access with your user responsibility.

- Optional: You can also access a site's specialty sites directly at the following URL:
`http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?site=<Store ID>`

Note: Site ID (formerly called Minisite ID) is viewable in the Update Site: Details page. This is a unique identifier given to the site upon creation.

Using Preview Mode

Oracle iStore's Preview mode allows merchants to preview Customer Application specialty sites while working on them in the Site Administration Application.

Use the Preview feature of Oracle iStore to preview the appearance of your specialty sites, sections, and products before making them available to customers. Preview mode is available in the Sites, Sections, and Products pages.

Preview and Transactions

You cannot perform any transactional processes in Preview mode, such as place orders, check out, log out, etc. The only purpose of Preview mode is to browse the catalog. Icons at the top of the page and links in the Browse Bin are not selectable. If you select the Add to Cart button, an error message, *Transaction is disabled in Preview mode* will be shown.

Preview and Web Cache

In a typical scenario, when the merchant selects the Preview button in Site Administration Application, the Customer Application is retrieved through the application server and uses data cached through JTT Cache. This ensures freshly cached data. Changes made by the site manager in the Site Administration Application are immediately viewable in the Customer Application.

There may be cases however, when the merchant enters Preview mode through the Oracle Application Server Web Cache. This type of preview, however, is not supported due to likelihood of seeing stale cached data. See the chapter, *Integrating Oracle iStore with Oracle Application Server Web Cache*, page 33-1, for more information.

Preview and Languages

When previewing a specialty site, a section, or a product, in the preview site window, specialty sites which do not support the iStore administrator's current session language will not be listed. For example, if the iStore administrator's current session language is German, specialty sites which do not support the German language will not appear in the site list.

Accessing Preview Mode

You can access Preview mode in one of two ways:

- Select the Preview button in the Sites, Sections, and Products pages, and then select

the name of the specialty site you wish to preview. All products and sections, whether published or unpublished, will display.

- Preview from Sites pages: Select Preview to bring up a list of specialty sites within the site. Or, if only one specialty site exists within the site, you will immediately see the Site Home Page for the specialty site.
 - Preview in Products pages: Select Preview to view the product detail page for that product. If more than one site or specialty site includes the product, you will need to first select a specialty site from the list that appears.
 - Preview in Section pages: Select Preview to be taken to the specific section page. If more than one site or specialty site includes the section, you will need to first select a specialty site from the list that appears.
2. Navigate to the Customer Application URL using the iStore Administrator responsibility. When the site manager (user with iStore Administrator responsibility) logs into the Customer Application while still logged into the Site Administration Application and using the same browser, he will be in Preview mode and will be able to see all sites, whether available to customers or not, and all products, whether published or unpublished.

Diagnostics and Troubleshooting

This chapter covers the following topics:

- Overview of Diagnostics and Troubleshooting Chapter
- Oracle CRM Diagnostics
- Browser Cookies and Oracle Java Applications
- Setting up User-Level Logging
- Technology Stack Debugging
- Receiving Diagnostic Messages
- Site Administration UI Errors
- Customer UI Login Errors
- Display Manager Errors
- Catalog Errors
- Pricing Errors
- Search Errors
- Notifications Errors
- Lead Import Errors
- Fulfillment Errors
- Product Comparison Errors

Overview of Diagnostics and Troubleshooting Chapter

This section contains instructions on error corrections and troubleshooting for problems that you may encounter in configuration or administration of Oracle iStore.

For troubleshooting Oracle Configurator integration, see the chapter, *Integrating Oracle iStore with Oracle Configurator*, page 23-1.

Oracle CRM Diagnostics

Oracle CRM Diagnostics is a tool that provides system integrators, consultants, and support analysts with a robust troubleshooting aids for diagnosing and troubleshooting Oracle products.

The diagnostic tests provided as part of the Oracle Diagnostics Support Pack gather information and perform a set of tests on that information. The results include the output of information gathered, the results of the tests and appropriate actions to take. The tests provided do not alter data or setup.

The Support Packs are updated and released on a monthly basis and include the latest updates to existing tests and all new tests that are available.

For more information, see *Oracle E-Business Suite Maintenance Guide*.

Browser Cookies and Oracle Java Applications

Sometimes, clearing all browser cookies can solve errors that occur when accessing Oracle's Java-based applications. To do so, follow the steps relevant to the browser you are using.

Steps to Check JTT Cookie Properties

To check the JTT cookie properties:

1. Login to the Oracle CRM Login Servlet as system administrator.
2. Select Settings, then System, then Properties, then Advanced.
3. Select JTF from the View drop-list to view only JTF properties.
4. Navigate to desired property cookie_name and select it. The Key Details page appears, where the current property values are displayed in Sequence.

How to Find the JTT Session Cookie Name

You can also find the JTT Session Cookie name by doing the following:

1. Enable cookie prompt in your browser.
2. Clear your browser cookies.
3. Go to your Site Home Page. You should be able to see the JTT Session Cookie name in one of the pop-up windows.

Setting up User-Level Logging

Oracle iStore allows user level logging of debug messages. This feature creates separate user log files for the JSP/Java and PL/SQL layers. You should only use this feature to diagnose problems in the application.

You can activate user-level logging by setting the profile option, IBE: Enable Debug, to Yes at the user level for a specific user.

If you want to enable log files for Oracle Order Capture, set the profile, ASO: Enable ASO Debug, to Yes at the user level. This will ensure that Oracle Order Capture-related logging messages will appear in the PL/SQL log files along with those for Oracle iStore, Oracle Order Management, and Oracle Pricing.

Important: If you have set the IBE: Debug profile option to Yes for a user, verify or set the profile option OM: Debug Log Directory at site level to a directory that is writable by the database server. Oracle iStore Customer UI user-specific logs for the PL/SQL layer are written in this directory.

Steps to Set up JSP/Java Level Logging

You may use the following steps to set up JSP/Java Level Logging:

1. Set the profile option IBE: Enable Debug to Yes at user level for a user.

When a user logs in to the Oracle iStore Customer UI, the application creates a user-specific log file in the same directory as the system log file. As long as the user session is valid, all log messages are written to the same log file.

The file name has the syntax IBE_<Username>_<Random Number>.log.

2. Note that the log directory in which Oracle iStore resides is specified in the Jserv Property file.

Example: If Jserv.properties has:

```
wrapper.bin.parameters=-Dserv.Logging.common.filename=D:  
\temp\ibe.log
```

at runtime you will have a log filename like:

```
D:\temp\ibe.log_3_1afaef486a7fd3aa8000_IBE.txt
```

Steps to Set up PL/SQL Level Logging

You may use the following steps to set up PL/SQL Level Logging:

1. Set the profile option, IBE: Enable Debug, to Yes at user level for a user.
2. Define database directories for PL/SQL file I/O.

See My Oracle Support Knowledge Document 2525754.1, *Using UTL_FILE_DIR or*

Database Directories for PL/SQL File I/O in Oracle E-Business Suite Releases 12.1 and 12.2.

3. Set the profile option, OM: Debug Log Directory, at site level to one of the database directories defined for PL/SQL file I/O.

When a user logs in to the Oracle iStore Customer UI, the application writes all log messages for the user to a user-specific log file in the directory specified by OM: Debug Log Directory.

The file name has the syntax IBE_<Username>.log.

Technology Stack Debugging

You may need to perform debugging on the Oracle CRM Technology Foundation technology stack. This might be necessary if, for example, you are receiving request time-out or login errors. If you have contacted Oracle Support, your support agent may ask you to set up the technology stack debugging.

In this case, in order to enable the Oracle CRM Technology Foundation logging trails, set the framework and service logging levels to `DEBUG`.

Note: For performance reasons, it is recommended that you only enable debugging on the technology stack if it is required.

Receiving Diagnostic Messages

When there is an Oracle iStore application error in the sites, such as an exception, Oracle iStore delivers a diagnostic e-mail message to any e-mail address that you specify. The diagnostic message contains the exception message and the application context. You can specify the e-mail address in the profile option, IBE: Email Address to send Diagnostic Messages. See the appendix, Profile Options, page A-1, for more information on the profile settings.

Site Administration UI Errors

This section contains errors which may occur when using the Oracle iStore Site Administration UI.

Understanding Browser Reload Action

In the Site Administration UI, when a user selects the Internet browser's Reload/Refresh button just after pressing the iStore Apply button, the browser does not just reload the page with the http "get" command, it repeats the last action (send the last request again). This means the browser will resubmit the form again with all the old form data. This may cause an error to display in the UI. It is recommended that the user not press

the browser's Reload/Refresh button just after pressing the Apply button.

Explanation: All iStore tables have one column, `object_version_number`, to ensure that when a user submit a form, the data is not stale. If user submits the form again with all of the "old" form data by selecting the browser's Reload/Refresh button, sometimes an error will be shown to indicate that the object version number is not correct.

Section Hierarchy Errors

Use the following fix for the error listed below.

Cannot Find Item to Add to Section

If you want to add an existing Oracle Inventory item to a section and cannot find the item, then check the following:

- In Oracle Inventory, check the Web Status flag for the item. If the item is Disabled, it will not appear in the Site Administration UI.

Customer UI Login Errors

If a user is experiencing errors when trying to log in to a specialty site, the cause may be one of the following:

1. You are logging in to Oracle CRM Applications at: `http://<host>:<port>/OA_HTML/jtfllogin.jsp` instead of the Customer UI at one of the following URLs: `http://<host>:<port>/OA_HTML/ibeCZzdMinisites.jsp` or `http://<host>:<port>/OA_HTML/ibeCZzpHome.jsp?site=<Store ID>`
2. You are trying to log in with a site manager user name instead of a customer user name. Make sure the user name has an Oracle iStore customer responsibility such as `IBE_CUSTOMER`.
3. The person party setup for a user in TCA is not correct
4. The organization associated with a B2B user is not valid
5. The relationship between an B2B user and an organization is not valid
6. The B2B user has no valid account in TCA.

When any of these errors occur, an error message will be displayed in Customer UI. Users can contact their system administrator to check the setup.

Display Manager Errors

Use the following fixes and workarounds for the Display Manager error messages listed

below.

TemplateNotFoundException or MediaNotFoundException

This error occurs when the method `DisplayManager.getURL()`, `DisplayManager.getTemplate(accessName)`, or `DisplayManager.getMedia(accessName)` is used.

- Verify that the template or media was created in the Site Administration UI by searching for it by access name in the Site Administration UI.
- Verify if the template or media has the mapping for the specific site and language. If not, verify if the template or media has default mapping.
- Reboot the server.
- Check the log file for diagnostic messages.

NullPointerException (Template or Multimedia Object is Null)

This error occurs when the method `Item.getTemplateFileName()`, `Section.getTemplateFileName()`, or `Display Manager.getSectionMedia(...)` is used.

This error indicates that a product or section mapping to a template or media was not defined and that a site level default also was not defined.

- Verify if any template or media is mapped to the product or section under the specified display style or content component.
- Verify if the template or media exists.
- Verify if the template or media has the mapping for the specific site and language. If not, verify if the template or media has default mapping.
- If the category default is in use, check whether a mapping has been defined at the category level for the requested display style.
- Verify that the specified display styles or content components are referenced in the runtime JSP.
- Verify that the product or section cache was cleared after the mapping was created.
- Check the log file for diagnostic messages.

New Template (or Multimedia) Has Been Associated with a Product/Category/Section, But Won't Show Up at Runtime

Verify the following:

- Verify that the association was created in the Site Administration UI.
- Verify that the specified display styles or multimedia components are available.
- Verify that the product or section cache was cleared after the association was created.
- Check the log file for diagnostic messages.

Catalog Errors

To troubleshoot Catalog errors, use the checkpoints or the following fixes for specific error messages.

Checkpoints

Use the following checkpoints:

- View the JSP source in the web browser and look for a stack trace.
- Check the log file for a stack trace.
- If you know the JSP or Java method in which the error occurred, search the log file for debug statements from the JSP or method.
- If a specialty site page does not appear, verify whether the problem is with the database, Application server, connection, or JTT/AOL as follows:
 1. Go to the following URL:
`http://<host>:<port>/html/jtfmain.htm`
 This page has links to test the basic functionalities that Oracle iStore depends on.
 If the page itself does not appear, the problem is with the database connection.
 2. Follow the instructions on the page and use the links to check for environment problems.
- If an eMerchandising posting from Oracle Marketing does not show up in the Oracle iStore catalog, check the following points:
 - Oracle Marketing is installed.
 - The profile option, IBE: Use Web Placements, is set to Yes at site level.
 - The centralized posting JSP (ibecpstg.jsp or ibeCCtpPostingI.jsp) is modified to set the correct posting ID value.

- After modifying the centralized posting JSP, the following pages were removed from the `_pages` directory and recompiled: `ibec*.java`, `ibescdch.java`, `ibeCCt*.java`, `ibeCScdViewA.java`, `ibec*.class`, `ibescdch.class`, `ibeCCt*.class`, and `ibeCScdViewA.class`.
- If Oracle iStore has successfully displayed other types of eMerchandising postings, the problem may be due to an Oracle Marketing setup issue or other Oracle Marketing problem.

Specific Error Messages for Catalog

Use the following fixes and workarounds for the error messages listed below.

No Items in the Catalog

Check the following:

- Check the following profile options:
 - IBE: Item Validation Organization
 - MO: Operating Unit
- Check the Oracle Inventory Item setup for items that should appear in the catalog. They must have the following setup:
 - Web Status = **Published**
 - `start_date_active` is NULL or `<=SYSDATE`
 - `end_date_active` is NULL or `>=SYSDATE`
 - The item's primary unit of measure is in `MTL_UNITS_OF_MEASURE_VL`.
 - The item is available in the user's organization. A user only sees items in his or her inventory organization. You can check the Oracle iStore log file for "Organization Id" to see the value of the user's Inventory Organization ID.
- If there are configurable items in the catalog, confirm that their components' item setups are also correct. Otherwise, their descriptions will not appear in Oracle iStore.
- Check that the items have not been explicitly excluded from the site.

Items Do Not Have Prices

Check the following:

- Check the following profile options:
 - IBE: Pricing Event—Before Shopping Cart
 - IBE: Request Type to get a Price (for pre-11.5.8 only)
 - IBE: Use Price List Associated with Specialty Site
- Confirm that items are in the site price list.
- Confirm that the site has the correct price lists for walk-in and registered B2B and B2C users.
- Confirm that the price list has item prices for the correct UOMs.
- Confirm that the price is set up correctly in Oracle Pricing.
- Check the log file for the pricing API, Item.getListAndBestPrices(), that is being called. Confirm the values that Oracle iStore passes to the Pricing engine: price list ID, currency code, inventory item IDs, UOM codes, price request type, and pricing event. Oracle iStore only passes party ID and account ID for user-specific pricing. Check the values that Oracle Pricing returns: status code and status text.
- Status Code from Pricing Engine
 - UPDATED
 - DUPLICATE_PRICE_LIST
 - INVALID_UOM
 - IPL: Invalid price list ID, that is, a non-existent price list.
- If prices for model bundles do not display, make sure the model bundles are set up correctly as described in "Integrating Oracle iStore with Oracle Bills of Material".
- If items for model bundles do not display and you are running a multi-org setup, then make sure that you have copied the bill to all of the appropriate organizations. When you create a bill, it exists only in the current organization.
- If the profile option IBE: Use Price List Associated with Specialty Site is set to No, check the following setups:
 - Set the profile option ASO: OM Defaulting to Yes at the desired level: site, application, responsibility, or user.
 - Log in to Oracle Forms with the Oracle Pricing Manager responsibility. Choose Setup > Event Phases. Query for all event phases. Set Search Flag to Yes for the

pricing event "LINE" in all phases.

- Log in to Oracle Forms with the Oracle Pricing Manager responsibility. Choose Price Lists > Price List Setup. Search for the price list in question. Make sure the precedence at the product level is set correctly so that Oracle Pricing can resolve to a single price list.

For example, if there are only two price lists defined, Price List A and Price List B, and all users qualify for both price lists, and if both price lists contain Product X with precedence 220, then Oracle Pricing returns an error because it cannot choose a single price list. If the Product X precedence is 100 in Price List A and 220 in Price List B, Oracle Pricing can resolve to Price List A.

- To confirm that the defaulting row is set up correctly in Oracle Order Management, log in to Oracle Forms with the Order Management Super User responsibility. Choose Setup > Rules > Defaulting. Search using the criteria of Application = Oracle Order Management and Entity = Order Header. Select Order Type from the Attributes section and select Defaulting Rules. Add an entry in the Default Sourcing Rules with the following information:
 - Sequence = 1
 - Source Type = Constant Value
 - Order Type = Standard

"Add to Cart" Buttons Do Not Appear

"Add to Cart" buttons are not displayed for items that are not orderable on the web and for items that do not have defined prices.

- Check that the item setup has Orderable on the Web checked in Oracle Inventory.
- Check the price setup.
- Confirm that the item's BOM item type is not OPTION class.
- If the item's BOM item type is MODEL, the item must either have the Oracle Configurator UI setup or follow the model bundle setup. Otherwise, it will be treated as a standard item.
- Check the value of the profile option, IBE: Use Add Item Bin -- it should be set to Yes.
- Check that the item's Inventory flag, Orderable on the Web, is set to Yes.

Please Refresh Your Shopping Cart

This error may occur when customers try to add items to a cart and the ASO: Default Quote Status profile option is not set properly. To fix the error, set the profile option to `Store Draft` at the iStore application level.

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

Pricing Errors

To troubleshoot Pricing errors, use the following checkpoints and debugging procedures.

Checkpoints

Use the following checkpoints to troubleshoot pricing in Oracle iStore.

- If you want to use the Oracle Pricing engine to determine which price list to use in Oracle iStore, then set the profile option `IBE: Use Price List Associated with Specialty Site` to `No`. See the chapter, *Implementing Pricing*, page 11-1, for more information on this profile option.
- When you create a new modifier, run the `Build Attribute Mapping Rules` concurrent program with the `Pricing Manager` responsibility.
- Check that the profile options, `IBE: Pricing Event for Shopping Cart` and `IBE: Pricing Event--Before Shopping Cart`, are set as mentioned in the chapter, *Implementation Tasks for Oracle iStore*, page 4-1.

Generating a Pricing Debug Trace

You can generate a pricing debug trace to create detailed log files when Oracle iStore calls the Oracle Pricing engine. Oracle iStore creates two log files because it calls the Oracle Pricing engine twice, once in the catalog and once in the shopping cart. The call from the catalog goes directly to Oracle Pricing. The call from the shopping cart is performed through Oracle Quoting, resulting in additional quote-related information in the log file.

Use the following procedure to generate the pricing debug trace.

Steps

1. Set the profile option QP: Debug to Yes at the user level for the username that you are testing.

2. Set the profile option OM: Debug Log Directory at the site level to one of the database directories defined for PL/SQL file I/O. To find this value, perform the following SQL*Plus query:

```
select value
from v$parameter
where name='utl_file_dir';
```

See My Oracle Support Knowledge Document 2525754.1, *Using UTL_FILE_DIR or Database Directories for PL/SQL File I/O in Oracle E-Business Suite Releases 12.1 and 12.2.*

3. Log in to the Oracle iStore Customer UI as the user that you are testing.

4. Perform the pricing activity that you are trying to debug.

5. In the operating system, navigate to the directory specified in the profile option OM: Debug Log Directory.

6. In this directory, locate the file named <Random Number><Username>.dbg. This is the debug trace for the user and session.

7. As you read the debug trace file, keep in mind the following common reasons for discounts not being applied:

- Discount list header is inactive.
- Discount list header is ineffective as of the pricing date.
- Source system code on discount list is not correct. (Look at this for Oracle iStore orders.)
- Discount list line is ineffective as of the pricing date.
- Qualifiers for the discount list are not met.
- Pricing attributes for the discount list are not met.
- Discount list is getting eliminated by incompatibility.
- Price break discount conditions are not met.

Search Errors

To troubleshoot Search errors, use the following checkpoints:

- Check that Concurrent Manager is up and running.
- If searches are inaccurate, verify that interMedia was set up correctly. Refer to the "Implementing Products" chapter for more information.
- Look for data stored in the indexed search column.
- If you add multiple items that do not appear in the search table, re-run the Concurrent Manager program Store Search Insert. This program populates the search table in Oracle iStore with product information from the Oracle Inventory tables.
- The search function goes offline while Store Search Insert is running.

Notifications Errors

Use the following fixes for the errors listed below.

Notifications Are Not Delivered or Have Errors

This error occurs if you did not remove the access locks from the messages and items of the Oracle iStore-related Oracle Workflow definition before upgrading Oracle iStore. The patch or upgrade cannot overwrite the Oracle Workflow definition if you do not first remove the access locks.

Use the following procedure to back up the necessary customized messages, remove the access locks, and apply the patch or upgrade again to fix this error.

Steps

1. Open the Oracle Workflow data store file (IBENOTIF.wft) that contains this item type.
2. In Oracle Workflow Builder, back up the item type iStore Alerts Workflow (IBEALERT) as follows:
 - Choose File, Save As.

The Save As window opens.

 - In the Save As window, highlight the File radio button, enter the file name, and select OK.
3. Unlock all seeded objects, such as messages, in the database copy of the item type iStore Alerts Workflow (IBEALERT). To do so, perform the following steps for each seeded Oracle Workflow object in the item type:
 - Select the object.

- Choose Edit, Properties.
The Navigator Control Properties window opens.
 - In the access tab, uncheck the options Preserve Customizations and Lock at this Access Level.
 - Click OK.
4. Save the Oracle Workflow data store file back to the database.
 5. Apply the patch or upgrade to overwrite the existing Oracle iStore-related Oracle Workflow definitions.

Approval/Rejection Notifications Not Sent

If all other Oracle iStore notifications are being sent out (including registration notifications) but:

- Approvers are not getting notified of pending approvals
- Registering users are not getting notified upon being approved/rejected

then, verify the below setup:

1. Login as Oracle (Forms) Applications as System Administrator and choose Workflow Administrator responsibility.
2. Navigate to Administration, Administrator Workflow screen.
3. Ensure that the Notification Style field is set to a value other than, "Do not send me mail", under the Global Preferences region.

Lead Import Errors

This section contains troubleshooting information for Oracle iStore's Lead Import functionality, which captures customer data from iStore orders and expired carts and makes them available in Oracle Sales Online and Oracle TeleSales.

See the chapter, Integrating Oracle iStore with Oracle Sales Applications, page 29-1, for details.

Leads Have No Owner

If leads retrieved in Oracle Sales Online or Oracle TeleSales have no owner, check the value of the profile option, OS: Assign New Lead. This profile option attempts to assign a sales representative as the owner of a batch of leads.

Lead Data Overlaps

If the data in your leads overlaps or shows duplicate records, you may not have synchronized the iStore Lead Import Concurrent Program Set schedule and the interval profile options which also control how often the concurrent program set runs.

Fulfillment Errors

To fix issues with Postsales, first verify that the following prerequisites were done.

- All the views in Postsales are "VALID" in the database.
- Regions exist in Apps. Use the developer responsibility AK Developer or Apps for the Web Manager.
- Shipments, invoices and payments were created by the merchant through ERP applications before trying to view them in Oracle iStore.

Product Comparison Errors

Selecting less than two products to compare or exceeding the maximum number of products that can be compared will generate the following error messages:

Product Detail page

Exception	Type: E=Error W=Warning	Error / Warning Message
If no products is selected.	E	No items were selected. Please check the boxes next to the items you wish to compare and select at least two items.
If only one product was selected.	E	Only one item was selected. Please check the boxes next to the items you wish to compare and select at least two items.
If the number of products selected for comparison exceeds the maximum number of products.	E	You cannot select more than <X> items for product comparison.

Product Multi-Select with Section links page

Exception	Type: E=Error W=Warning	Error / Warning Message
If no products is selected.	E	No items were selected. Please check the boxes next to the items you wish to compare and select at least two items.
If only one product was selected.	E	Only one item was selected. Please check the boxes next to the items you wish to compare and select at least two items.
If the number of products selected for comparison exceeds the maximum number of products.	E	You cannot select more than <X> items for product comparison.
If you select the Compare check box for a configured item.	E	Configured items are not supported for product comparison.

Integrating Oracle iStore with Oracle Advanced Supply Chain Planning

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Advanced Supply Chain Planning Chapter
- Overview of Oracle Advanced Supply Chain Planning
- Setting up Oracle Advanced Supply Chain Planning

Overview of Integrating Oracle iStore with Oracle Advanced Supply Chain Planning Chapter

This chapter describes the integration of Oracle iStore with Oracle Advanced Supply Chain Planning.

Overview of Oracle Advanced Supply Chain Planning

Oracle Advanced Supply Chain Planning is a comprehensive, Internet-based planning solution that decides when and where supplies such as inventory, purchase orders, and work orders should be deployed within an extended supply chain. It performs the supply planning function.

Setting up Oracle Advanced Supply Chain Planning

Set up Oracle Advanced Supply Chain Planning for Global ATP if you want to provide global inventory availability information to your customers. As part of the rules for determining availability, you can provide sourcing rules that encompass orders already placed, open purchase orders, and other availability factors.

For more details, refer to *Oracle Advanced Planning and Scheduling Implementation and User's Guide*, *Oracle Inventory User's Guide*, and *Oracle Order Management Implementation*

Manual.

You must also set up Oracle Material Requirements Planning. See *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide* for more information.

Setting up Global Available to Promise (ATP)

Oracle iStore can provide regular available to promise (ATP) information on inventory items without customization. For more information, see the chapter, *Implementing Products*, page 7-1.

If you want to enable global ATP for Oracle iStore, you must install Oracle Advanced Supply Chain Planning and Oracle Material Requirements Planning.

Integrating Oracle iStore with Oracle Bills of Material

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Bills of Material Chapter
- Overview of Oracle Bills of Material
- Oracle iStore Functionality with Oracle Bills of Material
- Implementing Oracle Bills of Material

Overview of Integrating Oracle iStore with Oracle Bills of Material Chapter

This chapter describes the integration of Oracle iStore with Oracle Bills of Material.

Overview of Oracle Bills of Material

Oracle Manufacturing and Oracle Order Management use Oracle Bills of Material (BOM) to store lists of items (products) associated with a parent item and information about each item's relationship with its parent.

Oracle Bills of Material supports the following types of bills of material:

- Standard
- Models
- Option class
- Planning

Oracle iStore Functionality with Oracle Bills of Material

You can use Oracle Bills of Material to set up configurable models, model bundles, and items with standard warranties for sale in your sites. This chapter addresses only the setup of **model bundles** in Oracle iStore using Oracle Bills of Material.

For information about creating bills of material for other types of products, see *Oracle Bills of Material User's Guide* and *Oracle Inventory User's Guide*. For more information on setting up configurable items, see the chapter, *Integrating Oracle iStore with Oracle Configurator*, page 23-1.

Overview of Model Bundles

The Oracle iStore product catalog supports model bundles. A model bundle is a pre-configured model item in which all components (option classes) are mandatory.

A model bundle exists in Oracle Inventory and Oracle Bills of Material as follows:

- In Oracle Inventory, one model item is the top item in the model bundle. Option classes represent every other item in the model bundle.
- In Oracle Bills of Material, the model item's bill lists every option class as a mandatory component. Each option class's bill lists only one item as an option.

From the customer perspective, the model bundle consists of the Oracle Inventory model item and the items listed on the option class bills in Oracle Bills of Material.

Use a model bundle only when revenue recognition at the component item level is required. Otherwise, use a standard item for better performance.

Model Bundle Display in the Catalog

The catalog display of model bundles is similar to standard item display.

Model bundle products are displayed in the catalog as follows:

- The catalog display price is the sum of the prices for the model bundle's model item and other components, including option classes and items.
- In section pages, a model bundle is listed with the descriptions of its model item. The model bundle's other components are not listed.
- In a section page with single item selection, an Add to Cart button appears next to a model bundle.
- In a section page with multiple item selection (which normally appears with items listed in a pull-down menu), an Add to Cart button appears next to a model bundle. Customers cannot include a model bundle when selecting multiple items for

addition to their carts.

- Model bundles do not appear in the menus unless Express Checkout is turned off.
- The item detail page displays descriptions of the model bundle's model item and lists the model bundle's components.
- Express Checkout is not available for model bundles.

Model Bundle Display in the Shopping Cart

The shopping cart display of model bundles is similar to standard item display.

Model bundle products are displayed in the shopping cart as follows:

- A model bundle appears as one line in the shopping cart.
- A Bundle Details link appears in the shopping cart line. Clicking it displays a list of the model bundle's items.
- If a customer wants to use a commitment for the model bundle at checkout, he or she can only apply an open commitment. See the "Implementing Pricing" chapter for more information on commitments.

Model Bundle Pricing

A model bundle's price is the sum of the prices for the model item and other component items.

You can set up pricing for a model bundle component in one of the following ways:

- The component's price varies depending on whether the component is purchased separately or as part of a model bundle.
- The component's price is always the same.

Use the pricing attribute Model Id to allow variable component pricing depending on whether it is purchased separately or as part of a particular model. When the component is purchased separately, no pricing attribute is passed to Oracle Pricing. When the component is purchased as part of a model, the model ID is passed to Oracle Pricing as the pricing attribute Model Id.

Model bundle pricing is available only for the model item's primary unit of measure (UOM).

Example: Pricing Model Bundle Components

The item Java Book has the following pricing:

- \$20 when purchased separately

- \$5 when purchased as part of a Java course

To establish this pricing, the price list must have two lines for the item Java Book:

- Java Book \$20
- Java Book \$5, Model Id = Java course's model ID

Implementing Oracle Bills of Material

Use the following procedure to create a model bundle. See the chapter, *Verify Mandatory Dependencies*, page 2-1, for more details about creating site products.

Prerequisites

- Set up the Oracle Configurator servlet as described in the chapter, *Integrating Oracle iStore with Oracle Configurator*, page 23-1, and the *Oracle Configurator Installation Guide*. Oracle iStore uses the Oracle Configurator servlet to retrieve model bundle information. You do not need to create Configurator UIs for model bundles.
- Set the profile option, BOM: Configurator URL of UI Manager, to Oracle Configurator Servlet URL. Set the profile option at site, application, and IBE_CUSTOMER responsibility levels. Remember, if you are implementing multiple organizations, you will have more than one customer responsibility. Be sure to set the profile option for all customer responsibilities for all organizations. See the appendix, *Profile Options*, page A-1, for details.

Steps

1. Login to Oracle Forms with Inventory responsibility. In Oracle Inventory, create the model bundle's model item with the following settings:
 - In the Bills of Material tab:
 - BOM Allowed = Yes (checked)
 - BOM Item Type = Model
 - In the Work In Process tab:
 - Build In WIP = No (unchecked)
 - Supply Type = Push
 - In the Order Management tab:
 - Pick Components = Yes (checked)

Remember that pricing for a model bundle is available only for the model item's primary UOM.

1. In Oracle Inventory, create the model bundle's option classes with the following settings:
 - In the Bills of Material tab:
 - BOM Allowed = Yes (checked)
 - BOM Item Type = Option Class
 - In the Work In Process tab:
 - Build In WIP = No (unchecked)
 - Supply Type = Phantom
 - In the Order Management tab:
 - Pick Components = Yes (checked)
2. In Oracle Inventory, create the model bundle's non-model items with the following settings:
 - BOM Allowed = Yes (checked)
 - BOM Item Type = Standard

These items will be included in the option classes' bills in Oracle Bills of Material.
3. In Oracle Bills of Material, create a bill for each option class in the model bundle. Each option class bill should have only one item.

To ensure that prices are displayed and calculated for the model bundle's items, make the items in the option class bills optional. Oracle Order Management does not price items in a model bundle if they are mandatory.
4. In Oracle Bills of Material, create a bill for the model bundle's model item. Include the model bundle's option classes in the bill as mandatory components.
5. When you create a bill, it exists only in the current organization. If you are implementing multiple organizations, copy the bill to your other organizations, or reference the bill as a *common* bill. See *Oracle Bills of Material User's Guide* for additional details.
6. In Oracle Pricing, set up pricing for the model bundle's items. If you want an item to have different prices depending on whether it is included in a model bundle, use

the pricing attribute Model Id as described in the section, "Model Bundle Pricing", in this chapter.

- The model bundle's model item should have a price of zero, without any modifiers.
 - The model bundle's option classes should have prices of zero, without any modifiers.
 - The items in the option classes' bills should be set up with prices and any applicable modifiers.
7. If you have set up a pricing attribute for an item, you must run the Build Attribute Mapping Rules concurrent program to generate and display the correct prices. Follow the directions in *Oracle Pricing User's Guide*. Restart the Application server after the concurrent program completes.

See also:

- *Oracle Bills of Material User's Guide*
- *Oracle Inventory User's Guide*
- *Oracle Pricing User's Guide*

Integrating Oracle iStore with Oracle Configurator

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Configurator Chapter
- Overview of Oracle Configurator
- Creating Configurable Product Models
- Oracle iStore Functionality with Oracle Configurator
- Setting up Oracle Configurator
- Testing the Oracle Configurator Setup
- Troubleshooting Oracle Configurator Integration

Overview of Integrating Oracle iStore with Oracle Configurator Chapter

This chapter describes the integration of Oracle iStore with Oracle Configurator.

Overview of Oracle Configurator

Oracle Configurator allows user configuration of complex items. It also provides guided selling, where the user is offered a list of choices or sequential questions to create a hierarchical list of items to view and purchase. Oracle Configurator is used to create product models and to help the buyer assemble related and dependent products in the shopping cart.

Creating Configurable Product Models

You can use the Configurator Developer UI to create the product models for dependent and related products, and to build rules around the products.

To be configurable in Oracle iStore, a product model must have the following characteristics:

- The model and its associated option classes and standard items are defined in the Master Inventory Organization and assigned to the shipping organization.
- The model has a BOM item type of "Model" in Oracle Inventory, and its associated options have a BOM item type of "Option Class."
- The model and its associated options are Published and Orderable on the Web.
- The model and its associated option classes have a BOM structure defined in Oracle Bills of Material.
- The model and its components have been added to a price list. You can set the price of the option classes to zero if necessary, but they must be assigned to a price list.
- You have transferred the model and its components to the Oracle Configurator schema by running the Populate Configuration Models concurrent program from Oracle Manufacturing. (Choose Flow Manufacturing, Setup, Other, Configurator, Populate Configuration Models.)
- If you changed the model and its components in Oracle Order Management after you populated it into the Oracle Configurator schema, then you must run the Refresh Configuration Models concurrent program from Oracle Manufacturing. (Choose Flow Manufacturing, Setup, Other, Configurator, Refresh Configuration Models.)

The product models are imported initially from BOM models. You can use the Configurator Developer UI to create a tree structure for the product model. For example, if customers want to build their own laptops from a site of electronic items, then you can use the Configurator Developer UI to define the structure and the dependent (mandatory and optional) products (e.g., a 15" or 17" screen with 16MB or 32MB RAM and 6GB or 8GB drive).

Oracle iStore Functionality with Oracle Configurator

Oracle iStore allows users to configure items by retrieving the Configurator module through the Customer UI. This functionality is discussed in this section.

Customer UI Configurator Business Flow

The following is the business flow for configuring items in the Customer UI.

1. When the customer is browsing items in an Oracle iStore site, a Configure button appears next to each configurable item. Configurable items have a BOM item type of "Model" in Oracle Inventory, and are associated with a Configurator UI. In the

shopping cart, a *Reconfigure* link appears underneath the top item in a configured item.

Note that configured items are not merged in the shopping cart, regardless of the setting of IBE: Merge Shopping Cart Lines.

2. When the user selects Configure, the site sends a message to populate the Configurator UI with the item ID. The Configurator UI appears in the frame provided in an Oracle iStore page. Here, the related or dependent products can be assembled for placing the order.
3. Once the customer has finished building the list of selected items for the order, selecting Done in the Configurator UI's top menu bar places all the items in the shopping cart.
4. In the shopping cart, the user can update the quantity for the top level item.

Note: Launching Oracle Configurator from Oracle iStore is not supported if users are connected to your sites through Secure Socket Layer (SSL) network connections.

See *Oracle Configurator Developer User's Guide* for detailed setup documentation.

Retrieving the Configurator UI

Oracle iStore gets the Configurator UI via the Oracle Configurator Servlet URL, which handles all interaction between the client and the server. The URL is the location where the Oracle Configurator servlet resides. The installer of the servlet sets up this URL. For example, the URL could be

```
http://apps-server-host:8800/oa_servlets/oracle.apps.cz.servlet.  
UiServlet
```

The server and directory structure are installation-specific information that the calling application must read, but the `oracle.apps.cz.servlet.UiServlet` portion is always the same. Oracle iStore reads this URL from the profile option, BOM: Configurator URL of UI Manager. Set this profile option to the correct URL. You must also set the profile option, ASO: Configurator URL to the same URL.

Changing the Oracle Configurator UI

The Configurator UI is created with DHTML or a Java applet. The look and feel are similar to the Oracle iStore UI. If you want to change the Configurator UI, you can modify the HTML templates for Oracle Configurator. These templates are loaded in Oracle iStore's `html` directory on the same server by default. The Oracle Configurator data is stored in the CZ tables in the APPS schema.

If you change the UI for a model in Oracle Configurator Developer, you must restart the Application server and clear the cache before the new UI is available in Oracle iStore.

Using Solution-Based Modeling

Oracle Configurator Developer allows users to create configuration models using Oracle Inventory items and pre-existing ATO/PTO models, and to allow runtime users to order such models through Oracle iStore -- this is the goal of Solution-Based Modeling.

With Developer-created models, configuration users can create multiple instances of a configurable model component, with each model component configured differently -- this is known as *multiple instantiation*. In Oracle iStore, multiple instantiation enables Customer UI users to add components during their user session, adding and configuring as many separate components as needed. Oracle iStore displays and prices each sub-model according to its individually selected options.

Note that this does not require integration with Oracle Advanced Pricing.

To allow Oracle iStore (and Oracle Quoting) to distinguish between multiple instances of a component, the field `aso_quote_line_details.config_item_id` is used. When cart (quote) lines are added to a cart (quote) from a saved configuration, this field is populated with the `config_item_id` from `aso_i_config_details_v.config_item_id`.

Oracle iStore prices a configuration together with the rest of the cart lines. When pricing the restored/reconfigured configuration, the current option selections are matched with the previously saved cart lines. To accomplish the re-pricing, Oracle iStore uses the Oracle Configurator columns --- `config_item_id` and `parent_config_item_id` --- in the `cz_pricing_structures` table. These columns contain unique, temporary values for the newly selected items. The `config_item_id` column has appropriate values for the items existing in the saved configuration. The `config_item_id` column corresponds to the `configuration_id` column in Oracle Order Management.

Note that solution based modeling is not supported with Oracle iStore shopping list functionality.

For more information, see the *Oracle Configurator Implementation Guide* and the *Oracle Configurator User Guide*.

Configurator Usage Support

Companies may wish to distinguish between novice and expert users and then provide an Oracle Configurator UI based on their usage level. For example, Oracle Configurator can be set up so that novice users might only see high level, guided selling questions, while expert users would have access to an alternative UI with detailed options. This ability to distinguish between flows can also impact the model structure, the rules in a configuration session and the specialty site.

In order to support the Oracle Configurator usage functionality, Oracle iStore provides a hook in the API Java layer that allows merchants to supply custom code. The custom code can get the necessary parameters from the cookie and return the usage. If null is returned by the custom code, Oracle iStore does not pass the `config_effective_usage`

parameter in the initialization string -- otherwise, it passes the value returned by the custom code.

If no parameter is passed for usage in the initialization message (config_effective_usage), Oracle Configurator looks at the profile option, CZ: Publication Usage, for the usage value. If the profile has not been set, then Configurator uses the default usage, which is Any Usage.

Implementing the Usage Hook

A Java abstract class, public abstract class ConfiguratorHook, also is provided to act as an interface for a customer to implement the hook. This class contains one method, public abstract String getUsageParameter (String inventoryItemId, HashMap hashedParameters), which throws ConfiguratorException, FrameworkException, SQLException.

1. Create a Java file in your implementation of this abstract class, and name it CustomConfigHook.java. You can find an example in the section, "Example of CustomConfigHook Java File", below.
2. Add code and logic to implement the getUsageParameter API to return the usage parameter values used in the Configurator Developer tool to distinguish which UI to use.
3. Place the class file in the oracle.apps.ibe.configurator package.
4. Bounce the middle-tier server.

Example of CustomConfigHook Java File

Below is an example of a customized class file implementers might create and compile to pass a usage parameter. Implementers can create their own versions of the CustomConfigHook.java file to return strings created in the Configurator Design tool based on the values which will be the determining factors for retrieving the specified UI (for example, Site ID, whether the user has certain permission or not, values in the cookie, values in the input hash table passed in from customizations in the ibeCFgdFrameSources.jsp page, etc.).

This example file returns the string, Simple UI, if the user is in Site ID 1000; otherwise it returns, Advanced UI.

```
package oracle.apps.ibe.configurator;  
import oracle.apps.jtf.base.resources.FrameworkException;  
import com.sun.java.util.collections.HashMap;  
import java.sql.*;  
import oracle.apps.ibe.util.RequestCtx;  
import java.math.BigDecimal;
```

```

public class CustomConfigHook extends ConfiguratorHook {
/*****
*****
* Abstract method which defines the parameters for retrieving a
* configurator usage parameter
*
* @param inventoryItemId:String, hashedParameters:HashMap (to
* pass in any other parameters an implementation may need)
* @return String (value to be passed in the Configurator's xml
* initialize message as the "config_effective_usage" parameter)
* @throws FrameworkException - if there is a framework layer
* error
* @throws SQLException - if there is a database error
* @throws ConfiguratorException - for throwing application
* specific errors
*****
*****/
    public String getUsageParameter(String inventoryItemId, HashMap
    hashedParameters)
        throws ConfiguratorException, FrameworkException, SQLException
    {
        if (RequestCtx.getMinisiteId() == new BigDecimal("1000"))
            return "Simple UI";
        else
            return "Advanced UI";
    }
}

```

Setting up Oracle Configurator

Use the following procedure to set up Oracle iStore with Oracle Configurator.

Prerequisites

- The file env.txt, located in the \$COMMON_TOP/html directory, defines the directory that the variable \$FND_TOP represents. The content of the file should be similar to the following example:

```
FND_TOP=/<root path>/<database or environment name>/fnd/11.5.0
```
- You have set up and tested the Oracle Configurator servlet.
- You have built Configurator UIs for the configurable items that you plan to sell.

Steps

1. In Oracle Inventory, make sure that every item that can be shown for a configured item, from the root model item to every option class and every leaf node, is set with the required product flags in the Master Item form. See the chapter, *Implementing Products*, page 7-1, for more information.
2. In Oracle Pricing, make sure that every item that can be shown for a configured item is added to the price list that will be used by the site and customer, even if it has a zero price. See the chapter, *Implementing Pricing*, page 11-1, for more information.
3. Log in to Oracle Forms with the System Administrator responsibility and set the profile option, BOM: Configurator URL of UI Manager, at (a) site, (b) iStore application, and (c) IBE_CUSTOMER responsibility levels to the Oracle Configurator Servlet URL: `http://<host>:<port>/<ervlet zone>/oracle.apps.cz.servlet.UiServlet`.

The values for the host, port, and servlet zone are determined by your Application server configuration.

4. Set the profile option, ASO: Configurator URL, to the same value as BOM: Configurator URL of UI Manager.
5. Set the profile option, OM: Use Configurator, to Yes at the site level. This profile option is necessary for successful order placement.
6. Edit the database instance's Database Configuration (.dbc) file. The .dbc file enables connection to the database and is installed in the `$FND_TOP/secure/` directory. The following edits are required in addition to any configuration settings that are required by other Oracle applications:
 - Only Oracle thin drivers are supported, so uncomment:
`APPS_JDBC_DRIVER_TYPE=THIN`
 - Add the following line and replace the item between brackets with the appropriate value: `BATCH_VALIDATE_USER=[Applications Username of the Guest]`
 - Add the following line and replace the item between brackets with the appropriate value: `BATCH_VALIDATE_PWD=[Applications Password of the Guest]`
 - Uncomment the following line and replace "host_name" with the appropriate value: `DB_HOST=host_name`
 - Uncomment the following line and replace "port_number" with the appropriate value: `DB_PORT=port_number`
 - Uncomment the following line and replace "database_name" with the

appropriate value: DB_NAME=database_name

7. The jserv.properties file must have the template URL defined as follows (these URLs must be able to be resolved when entered into a browser):

```
wrapper.bin.parameters=-Dcz.uiservlet.templateurl=http://<host>:  
<port>/OA_HTML/US/czFraNS.htm  
  
wrapper.bin.parameters=-Dcz.uiservlet.templateurl.ie=http://<host>:  
<port>/OA_HTML/US/czFraIE.ht
```

8. In the Oracle iStore Site Administration UI, add the model item to some part of the catalog to be displayed.
9. In a load balanced environment, set the profile options, IBE: iStore Non Secure URL and IBE: iStore Secure URL to the load balancer URL (the www.oracle.com one).

See the appendix, Profile Options, page A-1, for more information about the profile options.

Testing the Oracle Configurator Setup

Use the following procedure to test the Oracle Configurator setup.

Prerequisites

You have enabled cookies for both the browser and the middle tier. Oracle Configurator requires cookies.

Steps

1. Test that the Oracle Configurator middle tier servlet is running and getting the Oracle Configurator version, by entering the following URL in the browser: `http://<host>:<port>/<servlet zone>/oracle.apps.cz.servlet.UiServlet? test=version`.

The browser should return a message similar to the following statement: Using configuration software build: 11.5.1.14.27 Expecting schema: 14c.

2. Create the Configurator Standalone Test Page by writing the following lines into an HTML file with an .htm file name extension.

```
<!--  
=====
```

====

```
|           Copyright (c)2000 Oracle, Redwood Shores, CA  
|                                     All rights reserved.
```

```
+=====
```

=====

```
|  
| FILE  
|   Configurator Standalone Test Page
```

```

|
| DESCRIPTION
| This page posts an initialize message to the Configurator
Servlet
| in order to provide an test of the middle tier, isolated from
the
| rest of iStore.
|
| To use this page, read the comments below and replace the
values in []
| with values specific to your implementation. Remove the []'s
too.
| Remember to edit the form action near the bottom of the page.
| Then open the page in a browser and click the Launch DHTML
button.
|

```

```

+=====
====-->
<HTML>
<HEAD>
<TITLE>Configurator Standalone Test Page</TITLE>
<SCRIPT LANGUAGE=javascript>
<!--
//globals
    var ns4 = (document.layers)? true : false;
    var ie4 = (document.all)? true : false;
    function submitXML1 () {
        var xmlValue = '';
        xmlValue += '<initialize>';
//Replace the file name with the implemented dbc filename:
        xmlValue += '<param name="database_id">[dbcfilename.dbc]
</param>';
//Replace the value with the inventory info of the configurable
model item:
        xmlValue += '<param name="model_id">[1234]</param> ';
        xmlValue += '<param name="model_uom">[Ea]</param> ';
        xmlValue += '<param name="model_quantity">1</param> ';
//Try to use an icx session ticket retrieved from a logged init
message
        xmlValue += '<param name="icx_session_ticket"
>CB3E55CF36C0AECD
        </param> ';
//This responsibility ID is currently irrelevant

```

```

        xmlValue += '<param name="responsibility_id">22372</param>
';
//Enter the appropriate application ID (usually, it will be 671 for
iStore)
        xmlValue += '<param name="calling_application_id">[671]
</param> ';
//Enter the organization ID for the configurable item:
        xmlValue += '<param name="context_org_id">[123]</param> ';
//Use any date earlier than the current sysdate
        xmlValue += '<param name="config_creation_date">[06-1-
2000]
        </param> ';
//Do not change the UI type for this test:
        xmlValue += '<param name="ui_type">DHTML</param>';
//If the jserv properties are not correctly defined, the template
URL can be
//defined here:
//        xmlValue += '<param name="template_url">
//        http://[machine]:[port]/OA_HTML/US/czIFrame.
htm</param>';
//Alternate way of connecting to the database if the dbc file is not
working
//(replaces database_id)
//        xmlValue += '<param name="alt_database_name">
//        jdbc:oracle:thin:@[machine]:[port]:[sid]</param>';
//        xmlValue += '<param name="user">[login]</param>';
//        xmlValue += '<param name="pwd">[password]</param>';
//        xmlValue += '<param name="gwyuid">[login]/[password]
</param>';
//Alternate way of specifying which DHTML UI to launch (replaces
model_id
//and context_ord_id)
//        xmlValue += '<param name="ui_def_id">[1234]</param>';
        xmlValue += '</initialize>';
        submitXML (xmlValue);
}
function submitXML (xml) {
    if (ns4) {
        document.form1.XMLmsg.value = xml;
        document.form1.submit ();
    } else if (ie4) {
        form1.XMLmsg.value = xml;
        form1.submit();
    }
}

```

```

        }
    //-->
</SCRIPT>
</HEAD>
<BODY>
<FORM action="http://[machine]:[port]/servlets/oracle.apps.cz.
servlet.UiServlet" method=POST
id=form1 name=form1>
<input type="hidden" name="XMLmsg" value=''>
</FORM>
<FORM action="" method=POST id=form2 name=form2>
<INPUT type="button" value="Launch DHTML" id=button1 name=button1
onclick="javascript:submitXML1();">
</FORM>
</BODY>
</HTML>

```

3. Edit the fields in the Configurator Standalone Test Page as explained in the comment lines.
4. Open the Configurator Standalone Test Page in a browser.
5. In the Configurator Standalone Test Page, select Launch DHTML.
The UI should appear.

Troubleshooting Oracle Configurator Integration

This section lists checkpoints and fixes that you can use to resolve common Oracle Configurator integration errors. You can also use the Oracle Configurator initialize and terminate messages in the Oracle iStore Java log file as diagnostic tools.

Common Oracle Configurator Integration Errors

This section lists checkpoints and fixes for common Oracle Configurator integration errors.

Configurable Item Does Not Appear in the Catalog

This error happens when the item is not published to the specialty site correctly.

- Check that you have added the item to a published site section.
- In Oracle Inventory, confirm that the item's Web Status is Published.

Configure Button Does Not Appear After Generating the Model

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Make sure the model was populated for the Master Inventory Organization. Using the Bills of Material responsibility, run the Populate Configuration Models concurrent program for the model and choose the value of the profile option IBE: Item Validation Organization for the Organization parameter.
- Check that all of the model's option classes and components are on the price list that is defined for the user, and that they have prices.
- In Oracle Inventory, check that the item has the properties Orderable on the Web and Web Status = Published.
- Check that a Configurator UI exists for the model, using the following SQL query:

```
select cz_cf_api.ui_for_item
(<item_id>,<org_id>,sysdate,'DHTML',-1,1234,<appid - iStore is 671>)
from dual;
```

For example, see the following SQL statement:

```
select cz_cf_api.ui_for_item
(137,204,sysdate,'DHTML',-1,1234,671)
from dual;
```

If the SQL query returns a non-null value, the Configurator UI exists.

If the query returns a null value, the cause is one of the following cases:

- No Configurator UI exists for the model. You must use Oracle Configurator Developer to build a Configurator UI.
 - A Configurator UI exists for the model, but it is not published for the user's application (usually Oracle iStore). In Oracle Configurator Developer, check that the model is in Complete status and includes Oracle iStore (IBE) as an application, then publish the Configurator UI. If the user's application ID is something other than 671 for Oracle iStore, the model's Configurator UI must be published for that application too. You can check the user's application ID in the cookie and in the initialize message from the Oracle iStore Java log file. Once the Configurator UI is published, you must restart the Application server and clear the cache to make the Configurator UI available.
- When the Configure button appears for a configurable item after completing these fixes or any other fixes, you should first try to add a standard item to the shopping cart. If you cannot add the standard item, then the issue is with the shopping cart and you will not be able to add a configurable item.

Clicking the Configure Button Does Not Launch the Configurator UI

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Make sure the value of the profile option BOM: Configurator URL of UI Manager is valid. Remember to check the machine name, domain name, port number, and servlet zone.
- Test that Oracle Configurator itself has been installed correctly and that the servlet is running, as described in the section, "Testing the Oracle Configurator Setup".
- Check that the Oracle Configurator HTML pages exist by navigating to:
`http://<host>:<port>/OA_HTML/US/czIFrame.htm`

Your browser should display a row of four buttons, labeled Summary, Availability, Done, and Cancel.

- Verify that the database instance's .dbc file is in the `$FND_TOP/secure` directory.
- Check that the correct `$FND_TOP` directory is specified in the `$COMMON_TOP/html/env.txt` file.
- Check that cookies are turned on for both the browser and the middle tier.
- Check the Oracle iStore Java log file's initialize and terminate messages for Oracle Configurator. Review the log messages to find possible errors, such as references to other environments and missing or incorrect values.
- Check that Oracle Configurator can run independently of Oracle iStore by using the Configurator Standalone Test Page described in the section, "Testing the Oracle Configurator Setup", in this chapter. If you have the initialize message from the Oracle iStore Java log file, edit the Configurator Standalone Test Page to include the message's values. When you select **Launch DHTML** in the page, the UI should launch and run, and you should be able to select **Done** and see summary information. If the UI does not launch or you cannot see summary information, there is a middle tier setup issue.

Clicking the Configure Button Returns IBE_ORD_CAUGHT_ERR

This error occurs when profile options have not been set up correctly.

- Verify that all required profile options have been set up.

Blank Screen

This error can occur for a variety of reasons. Check the Oracle Configurator UI log files

for the errors listed below, and use the fix described for the error. The Oracle Configurator UI log files are named `cz_exc__.log`. They are located in the `$OAH_TOP/util/apache/1.3.9/Apache/logs/` directory or the `$APACHE_TOP/Jserv/logs` directory.

- Database Connection Error—The `.dbc` file has not been set up correctly. Set up the `.dbc` file using the guidelines in the section, "Setting up Oracle Configurator", in this chapter.
- Socket Connection Error—The Application server is not running. Restart the Application server.
- Data/End of Communication Error—The Application server is not running. Restart the Application server.
- Unsatisfied Link Error—The `LD_LIBRARY_PATH` and shared library linking are not correct. Correct the `LD_LIBRARY_PATH` and shared library linking.
- OCI8/Thick Driver Error—The thin driver is not specified in the `.dbc` file. Edit the `.dbc` file to specify the thin driver.
- Other Errors—The profile option that identifies the Configurator URL has an invalid value. Enter the correct URL as the value of the profile options BOM: Configurator URL of UI Manager and ASO: Configurator URL.

Clicking Done in the Configurator UI Does Not Return User to Cart Page

This error can happen for a variety of reasons. Use the following checkpoint to diagnose the error:

- Check the terminate message in the Oracle iStore Java log file to see if Oracle Configurator returned an error. If so, there is an issue with the Oracle Configurator setup.

Items in a Configuration Have Null Descriptions in the Cart

This error happens when the items are not set up correctly in Oracle Inventory.

- In Oracle Inventory, check that the items have the properties Orderable on the Web and Web Status = Published.

Cannot Create an Order with a Configured Item

This error can happen for a variety of reasons. Use the following checkpoints and fixes to resolve the error:

- Verify that carts holding only standard items can be placed as orders. If not, then

the issue is not necessarily related to Oracle Configurator.

- In Oracle Order Management, check that for the Standard transaction type, a line flow has been defined for the item's User Item Type. For example, if the User Item Type is ATO Model, then verify that a line flow for the Item Type ATO Model has been defined for the Standard transaction type.

Ending a Configurator Session Does Not Return User to Load Balancer URL

In a load balanced environment, be sure to set the profile options, IBE: iStore Non Secure URL and IBE: iStore Secure URL to the load balancer URL (the www.oracle.com one).

Integrating Oracle iStore with Oracle Content Manager

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Content Manager Chapter
- Oracle Content Manager Overview
- Implementing Oracle Content Manager
- Oracle iStore Functionality with Oracle Content Manager
- Implementing Oracle iStore-OCM Integration
- Site Administration Behavior with OCM Integration
- Usage Summary Pages
- Concurrent Program to Migrate Data
- Understanding the OCM Integration Profile Option

Overview of Integrating Oracle iStore with Oracle Content Manager Chapter

This chapter details Oracle iStore's integration with Oracle Content Manager (OCM) to provide a full range of content creation, collaboration, approvals, versioning, and Web publishing functionality.

Oracle Content Manager Overview

Oracle Content Manager (OCM) is an integrated content management system for Oracle's E-Business Suite. OCM provides content management building blocks and manages unstructured data through create, approval, publish, and release lifecycles. OCM has a central repository that manages folders, versions, and translations, and enables an organization to collaboratively work on content with associated workflows.

See the Oracle Content Manager implementation and user guides for more information.

Oracle Content Manager Key Features

Oracle Content Manager (OCM) key features and benefits include:

- **Bulk upload:** Administrators can upload items in bulk; to help facilitate bulk upload, file extensions can be mapped to content types.
- **Content creation:** Content items, which can be re-used in other applications, including Oracle iStore, can be created and maintained.
- **Content types:** Data is organized into content types, which are logical sets of attributes and attachments defining the required building blocks of a content item. See the section, "Oracle Content Manager Content Types", in this chapter, for more details.
- **Seeded content items:** OCM provides some seeded content items. Seeded content items cannot be modified. An example of a seeded content item is a stylesheet.
- **Content management:** Existing content items can be updated from the OCM application.
- **Categories:** Content items are grouped into categories, allowing logical association of similar content items. Content items must be associated to a category in order to appear in the Library.
- **Security:** Permissions allow different users to possess varying degrees of permissions within the application. (These are separate from Oracle E-Business Suite permissions.) At the folder level, you can specify permissions globally, or specify permissions for specific users, CRM resource groups, or Oracle Applications responsibilities.
- **File attachments:** Attachments allow separate files to be linked to a content item. Attachments can be any type of files, such as text files, or binary files.
- **Style sheets:** A content type, style sheets tell an application's rendering engine how to display a content item to a calling application. Each content type may have several style sheets associated to it. Individual style sheets are stored in the repository like any other content item.
- **Collaboration:** Users worldwide can collaborate on content which is stored and accessed centrally.
- **Versioning:** A versioning system allows multiple versions and the ability to return to previous versions.

- **Translations:** Translation functionality allows users to upload translated content in order to translate content items into multiple languages.
- **Approvals:** OCM contains seeded approval processes which leverage Oracle Workflow to send e-mail notifications to users, communicating about the status of content items.
- **Folders:** Access to content also is controlled through the use of folders, also called directories. Users can be awarded access to several folders. Default folders can be assigned at site, application, and responsibility levels, through a profile option setting. A user's workgroup/working folder is the area that the user has access to in order to manipulate content items. Users can only view the directories and sub-directories to which they have been provided access. Users also have the option of setting a single folder as their "Home" folder. Users with specific permissions can create and manage folders.
- **Base language:** OCM has the concept of a single base language. The base language determines the language that content is created in. Any other languages beyond the base language need to be entered through the translation UI.

To learn more about the Oracle Content Manager application, see the *Oracle Content Manager Implementation Guide*.

Oracle Content Manager Integration Key Terms and Definitions

The following key terms and definitions relate to content management using Oracle Content Manager and/or Oracle iStore content management functionality:

- **Content Type:** A logical set of attributes and attachments related to a content item. See the section, "Oracle Content Manager Content Types", in this chapter, for more information.
- **Content Item:** Data of a certain content type. For example, if a "feature article" is a content type, then the specific article entitled, "Selecting the Right DB for your Company", is the content item.
- **Attribute:** A piece of data that makes up a Content Type. An Attribute is of data type text, date, number, etc. For example: "Title" is an attribute of the content type, "Feature article". An Attribute can have the following data formats: text, date, number, boolean, HTML, and URL, based on the OCM UI.
- **Live Version:** The Live Version is the version that is linked to a media object in the Site Administration UI. Oracle iStore does not check whether the section or product that includes the media object is Published or Unpublished.
- **Media Object:** Media objects are logical content holders for displaying media files, such as images and HTML content. Each media object maps to a physical

(electronic) content item/file to present content in the Oracle iStore Customer UI.

- Without OCM integration, Oracle iStore media object functionality allows you to control the files/content items that you want to display in a specific site and for a specific language. With OCM integration, no mapping is made at the language level, but rather, you select the content item in the language desired (after it has been translated). See the "Implementing Content" chapter for more information on Oracle iStore's media objects functionality. See the *Oracle Content Manager User Guide* for more information on translating content and selecting translated files.
- **Content Component:** Content components are placeholders for types of content that can be used in the catalog pages for sections and products. See the chapter, *Implementing Content*, page 10-1, for more information.
- **Class:** Media objects and content components are organized by their purpose, which is designated by their Class. The class concept replaces the previous *Applicable To* designation used to classify media objects and content components. See the chapter, *Implementing Content*, page 10-1, for more information.
- **iStore Object:** An iStore object is a section, product, or media object associated to a content item.

Oracle Content Manager Content Types

In OCM, content types are logical sets of attributes and attachments which define the required building blocks of a content item. Content types ensure content consistency and capture metadata. (Metadata describes how and when and by whom a particular set of data was collected, and how the data is formatted.) Content types are not file types. Examples of content types may include: images, white papers, sales presentations, feature articles, and style sheets.

Some content types are seeded in the application. The seeded types cannot be altered, but you can copy a content type and modify the duplicate. You also can create new content types.

Grouping Content Types

Content types can be grouped, and users can be given access to a specific content type group by setting the profile option, IBC: Content Type Group. See the *Oracle Content Manager Implementation Guide* for more information.

Implementing Oracle Content Manager

Set up Oracle Content Manager according to the *Oracle Content Manager Implementation Guide*.

Oracle iStore Functionality with Oracle Content Manager

Oracle iStore users can integrate with Oracle Content Manager (OCM) to leverage OCM's ability to create, version, approve, and manage content items within the Oracle iStore Site Administration Application. This content then can be used with existing Oracle iStore media objects and content components functionality to present the content in the Oracle iStore Customer Application.

Important: Following the integration, the Site Administration Application and related content functionality will change.

Integration with OCM provides the following benefits:

- A clear division of tasks among content creators, content translators, content approvers, and the site administrator
- Site administrators can preview content items before publishing them to a site
- Content versioning and the ability to quickly present a Live version in the sites
- Approval processes to ensure consistency and control of data

Depending upon the permissions awarded, the site administrator can be both a content creator and approver. Users with iStore administrator responsibility can be granted all of the privileges supported by Oracle Content Manager to create and approve content items.

Note: The profile option, IBC: Use Access Control, controls whether user permissions are checked in the OCM pages.

See the section, "Implementing Oracle iStore-OCM Integration", for additional details.

Architecture and Integration Points in Oracle iStore-OCM Integration

This section contains information on the architecture and integration points of the integration between Oracle iStore and Oracle Content Manager.

Architectural Overview

The following components are involved in content management with OCM integration:

- **Oracle Content Manager:** Allows users to create and update content, translate content, submit content for approval, and approve content.
- **Site Administration Application:** Oracle iStore's administration UI allows site administrators to select content and associate it with media objects and content components, preview content, and publish content.
- **Oracle iStore Customer Application:** Display content items in the Oracle iStore

specialty sites.

Integration Points

All content item information -- other than content item association to iStore objects (e.g., products, sections, and media objects) -- is stored in the Oracle Content Manager schema.

Oracle iStore-Oracle Content Manager integration points are as follows:

- **Oracle APIs:** An API layer allows a variety of Java and SQL communications between Oracle iStore, Oracle Content Manager, and the database.
For information on the public APIs, see the Oracle Integration Repository.
- **Retrieve and Update Content:** Site Administration Application and Oracle Content Manager APIs allow Oracle iStore to get the latest content from OCM data tables, and to communicate updates to that content.
- **Retrieve Published Content:** Oracle iStore Customer Application public APIs call OCM APIs to get the correct version of content items and display them in the specialty sites. Only content items which are published through the Site Administration Application will display in the Oracle iStore Customer Application.
- **Content Storage, Searching, and Retrieval:** Any number of content items can be stored in the OCM schema. Content items within the OCM working folder are available to the site administrator in the Site Administration Application. Site administrators can view summaries of content used in the sites, search for content items, approve content, translate content, and delete content. These abilities depend upon the OCM permissions awarded the administrator and the OCM setup, including the value of the profile option, IBC: Use Access Control.
- **Content Association to iStore Objects:** The association of content items and media objects is stored in the Oracle iStore schema. The site administrator can create and update associations only from iStore's Site Administration Application. The administrator will be able to select all Approved content items.
- **Content Management:** The OCM schema stores the content item version published in the Oracle iStore Customer Application. OCM's integration with Oracle Workflow allows e-mail notification of content approval processes.

Business Flows for Oracle iStore-OCM Integration

The following is the high-level business process flow for content management in Oracle iStore, when integrated with OCM.

1. **Content item is created.**

With the required permissions, the site administrator can create content items in the Site Administration Application. If he does not, the content creator creates content items in OCM.

2. Content item is submitted for approval.

In the Site Administration Application, the Submit button in the Create Content: Content Detail page submits the content item into the approval stage.

3. Content item is approved.

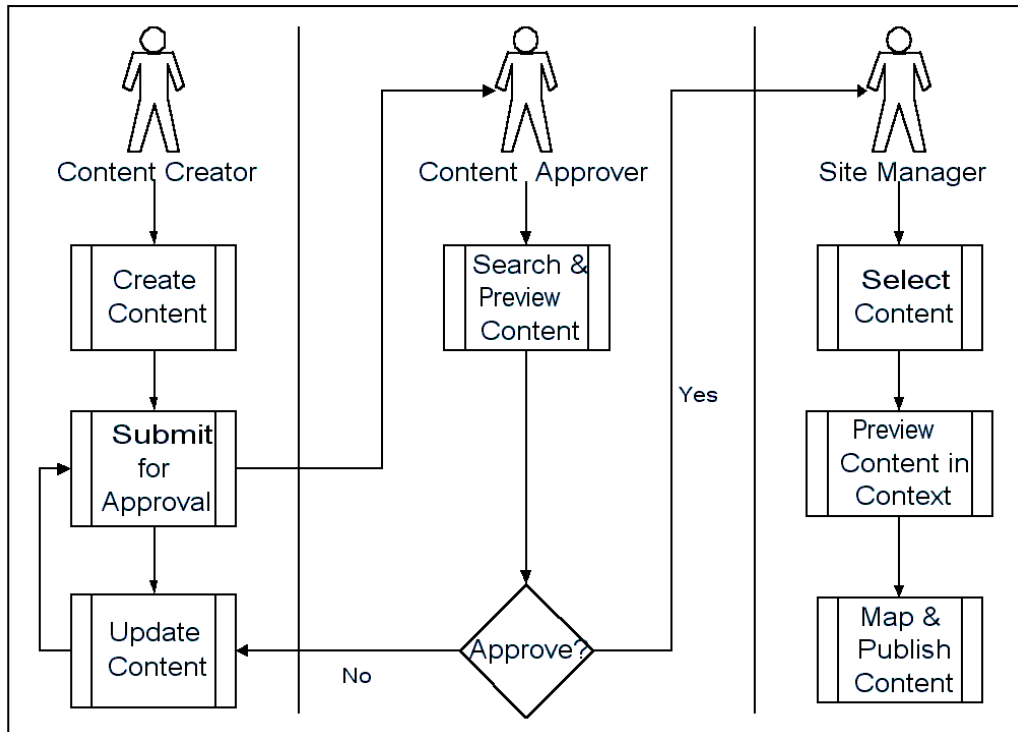
If the site administrator has the OCM Approve permission, the content is automatically approved --- if not, another user (with the permission) can use the Site Administration Application or the OCM UI to approve the content.

4. Content item is associated to an iStore object.

The site administrator uses the Site Administration Application to assign Approved content items to iStore objects (products, sections, or media objects).

The following figure shows the flow.

Oracle iStore-Oracle Content Manager Business Flow



Implementing Oracle iStore-OCM Integration

Integration with Oracle Content Manager is optional.

Note: This section assumes you have installed Oracle iStore and Oracle Content Manager, and performed any required post-installation steps.

Important: Once you integrate Oracle iStore with Oracle Content Manager, you **cannot undo** the integration.

The following are the implementation steps:

- Step 1 - Migrate Attachments from File System to Database
- Step 2 - Run Data Migration Concurrent Program
- Step 3 - Set Profile Options
- Step 4 - Modify Oracle iStore Menu
- Step 5 - Grant OCM Privileges to Site Administrator
- Step 6 - Test Oracle iStore-OCM Integration

Step 1 - Migrate Attachments from File System to Database

Oracle Content Manager does not support storing files in the file system. Therefore, you must migrate any attachments (files used in iStore) from the file system to the database. Use the following procedure.

1. Log in to the Oracle iStore Site Administration UI as the site administrator.
2. Manually change the URL to:
`http://<host>:<port>/OA_HTML/ibemdmgt.jsp`
3. In the file system to database job migration screen that appears, press the **Migrate** button to migrate attachments.

Note: The migration from the file system to the database can only be run on an HTTP server. It cannot be run successfully on an HTTPS server.

Step 2 - Run Data Migration Concurrent Program

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, iStore Oracle Content Manager Integration Migration.

Both existing customers and new customers who want to use the OCM integration must run the concurrent program **one time** as a mandatory step to migrate the seed and customer data.

Important: Ensure that the profile option, IBC: Use Access Control, is set to No at site level before running the data migration concurrent program.

Note: When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets the profile option, IBE: Use Content Management Integration, to Yes at site level.

See the section, "Concurrent Program to Migrate Data", below, for details.

Step 3 - Set Profile Options

Set the following profile options:

- **IBE: Default Home Folder:** Set at application level, using the value, /IBE. Setting this profile option allows the site administrator to access the correct OCM folder.
See the *Oracle Content Manager Implementation Guide* for additional details.
- **IBC: Use Access Control:** Set at site level (the only allowable setting). This profile option specifies whether permission/privilege checking is performed in the OCM pages.

Set to No to not use any permission checking in the OCM pages. This is the

recommended setting --- unless you are going to use privilege checking for site administrators.

Set to Yes to use privilege checking. If set to Yes, additional privileges must be awarded the iStore administrator. See "Step 5 - Grant OCM Privileges to Site Administrator", and the *Oracle Content Manager Implementation Guide* for additional details.

- **IBE: Use Content Management Integration:** When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets this profile option to Yes at site level. If it is not set at site level in your implementation, be sure to set it at site level. See the "Profile Options" appendix for more information.
- **IBE: Number of Days for Expiring Content:** Set to an integer at iStore application level. If integrating with OCM, the Usage Summary page in the Site Administration UI performs a default search of content items based on the number of days defined in this profile option. Oracle iStore reads the value of this profile option (*x*) and includes only those content items whose expiration date is that number of days (*x*) or less from system date (current date).

This profile option defaults to Null if not set. If left at the default value of Null, the search results will include all content, regardless of expiration date.

For more information on the Usage Summary pages, see the section, "Usage Summary Pages", in this chapter.

Bounce the Application server after making these profile option settings.

You may wish to set additional OCM profile options, depending on your business requirements. See the *Oracle Content Manager Implementation Guide* for details.

Step 4 - Modify Oracle iStore Menu

In order for the Oracle Content Manager subtabs to appear within the Site Administration UI's Content tab, you must replace the default Site Administration UI Content tab with the Oracle Content Manager integrated menu. Use the following steps.

Important: Avoid using the seeded SYSADMIN user to log into Oracle Forms and make the menu prompt changes. Use another user to login and make the changes.

1. Log in to Oracle Forms as a user other than SYSADMIN, using Application Developer responsibility.
2. Navigate to Application > Menu. The Menus window opens. Use the Menus functionality to do the following:
3. Within the iStore Merchant Root menu (IBE_M_MENU_ROOT):
 - Remove the Content prompt from submenu iStore Content tab (

IBE_M_CONTENT).

- Set the Content prompt to submenuiStore and iContent Content tab (IBE_M_CONTENT_IBC).
 - Save the changes.
4. Remember to bounce the Application server after making these changes.

For instructions on how to modify menus and functions, see: *Oracle E-Business Suite Security Guide*.

Step 5 - Grant OCM Privileges to Site Administrator

If the profile option, IBC: Use Access Control is set to Yes, you must grant OCM privileges to the site administrator(s). Log into Oracle Content Manager with the OCM Superuser responsibility and grant the desired content privileges to the site administrator(s) for the folder, /IBE.

The site administrator will be able to view and use approved content items in iStore, regardless of the privileges assigned. However, some functionality may be limited depending on the privileges awarded.

See the *Oracle Content Manager Implementation Guide* for additional details.

Step 6 - Test Oracle iStore-OCM Integration

Bounce the Application server and log in to the Site Administration UI. Following the successful integration of Oracle Content Manager, several UI and functionality changes occur in the Site Administration UI. It is recommended that you fully test the integration, using the information in the section, "Site Administration Behavior with OCM Integration", below, to guide you.

Site Administration Behavior with OCM Integration

After the successful integration of Oracle iStore and Oracle Content Manager, changes occur within the Content tab in the Oracle iStore Site Administration UI. And, the concept of source files associated with media objects is replaced by the concept of content items.

Existing Site Administration Subtabs and Related Functionality Changes

Following is the behavior of the existing Oracle iStore subtabs and related functionality in the Oracle iStore Site Administration UI, following the integration with Oracle Content Manager.

1. Content Repository subtab --- The Content Repository subtab is removed from the

Content tab.

2. IBE: Use Database for Media Storage profile option --- Oracle iStore ignores the value of this profile option.
3. Media Objects subtab --- The Media Objects subtab remains within the Content tab.
4. Source files terminology --- With OCM integration, the terminology "source files" is replaced with "content items." Otherwise, media object functionality is the same with and without OCM integration. See the "Implementing Content" chapter for more information.

Additional Site Administration Subtabs and Related Functionality Changes

Following is the behavior of the additional Site Administration subtabs and related functionality which appear following the integration with OCM.

Note: With the exception of the Usage Summary subtab information, the following documentation provides a high-level view of the additional subtabs and their purposes, since these are identical to the subtabs found in OCM. See the Oracle Content Manager Implementation Guide and the Oracle Content Manager User Guide for more information.

- Usage Summary subtab --- The Usage Summary subtab appears within the Content tab. This page is designed to give you summary information about how content items are being used in your sites. This is the only one of the OCM integration subtabs which is owned by the Oracle iStore application. The usage of this subtab is described in the section, "Usage Summary Pages", below.
- My Content --- This subtab contains the content item creation screens. It also allows searching and summary views of content items. This subtab appears only if you are integrating Oracle iStore with OCM.
- Library --- This subtab shows all content in categories.
- Pending Approvals --- This subtab displays content that is awaiting approval.
- Trash --- This subtab displays content that has been deleted.

Usage Summary Pages

Within the Content tab, the Usage Summary subtab shows approved content items that have been associated with media objects. These are the Live versions viewable in the Customer UI (provided that the product, section, and site in which they appear are viewable). The information presented helps you understand how content items are being used in your sites.

Note: Only approved versions of a content item can be associated with Oracle iStore media objects.

The Usage Summary page does not check whether the product, section, or site using a content item is in Published or Unpublished status, or in the case of sites, within viable dates. When content items have been associated to an Oracle iStore media object, they are considered *Live*.

The Usage Summary pages also allows you to update associations with the latest version of an approved content item, to access details about a content item and its usage, and to see and alter which version of a content item is live in the sites.

Following are the main tasks that can be performed in the Usage Summary subtab:

- Apply the latest approved version of a content item to an Oracle iStore object, if a previous version has been associated to an iStore media object
- Access content item details
- Access usage details for a specific content item
- Replace an associated content item with a new one

Usage Summary: Content Usage by Sites Page

Following the successful integration of Oracle Content Manager, when you select the Content tab, the Usage Summary: Content Usage by Sites page appears. This page summarizes the content items and how they are being used in your sites, through their associations to media objects.

To apply the latest version of a content item, select the Apply Latest Version button.

Applying the Latest Version of a Content Item

You can use the Usage Summary main page to quickly apply the latest version of a content item to an already established association. When the latest version is applied, all associations between the content item and media objects (including media objects mapped to products, sections, content components, and categories) are automatically updated.

To apply the latest version, navigate to the Usage Summary main screen by selecting Content, Usage, Apply Latest Version.

Guidelines

- Content items displayed by default in the Results table depend upon the value of the profile option, IBE: Number of Days for Expiring Content.
- When the latest version is applied, all existing associations are updated.

Viewing Usage Details and Changing Live Version

Select the Usage icon in the Usage Summary: Content Usage by Sites page Results table to retrieve the Usage Summary: Content Item Usage page; this page allows you to:

- View all associations for the content item
- Select another version of the content item to make the Live version -- this can be the latest version or an older version
- Navigate to the Update Media Object page by selecting the media object in the Used By table

Replacing Content Items

In the Usage Summary pages, you can replace a content item with another content item, and Oracle iStore automatically updates all existing associations with media objects -- including the mapping between the media objects and content components, categories, products, and sections.

Use the Usage Summary: Replace Content Item page to replace content items.

Content Items Search Utility

Within the Content tab, select the Usage Summary subtab and then enter search criteria to perform a search of content items.

When accessing the Usage Summary screen, both in the Simple and Advanced Search screens, a default search is performed to limit the display of content items. The default results will display all content items that are expiring in x days from the system date. The x days is set in the profile option, IBE: Number of Days for Expiring Content. See the appendix, Profile Options, page A-1, for details.

Simple Search

For Simple Search, log in to the Site Administration Application and navigate to Content, Usage Summary.

Guidelines

- **Search by LOV:** You may use the % sign as a wildcard if desired; however, this is not necessary, as iStore will append the wildcard if you do not enter it. The search utility is not case-sensitive.
- **Keyword search:** Keywords must first be entered into Oracle Content Manager (as meta-data on the content item) before you can search on them. Oracle iStore will search on the entire search string entered. For example, if the user enters "Christmas gift", iStore will find all the content items where the keyword matches Christmas

gift%. iStore search will not find content items where only Christmas or gift word is found as the keyword.

- **Blank spaces in keyword search:** Oracle iStore does not trim leading or trailing blank spaces (if present) when querying with search criteria data. Therefore, to avoid the search failing, when inputting a keyword with leading or trailing blank spaces (for example, <space>search keyword<space>, you should place percent signs (%) as wild cards before or after the search value (for example, % search keyword%).
- **Expiration Date Range field:** This should be based on the content item's expiration date.

Advanced Search

For Advanced Search, log in to the Site Administration UI and navigate to Content, Usage Summary.

Guidelines

- **Content Item field:** You may use the % sign as a wildcard if desired; however, this is not necessary, as iStore will append the wildcard if you do not enter it. The search utility is not case-sensitive.
- **Keyword search:** See the "Simple Search" topic, above, for more information.
- **Available Date Range field:** The search is performed on the available dates of content items.
- **Expiration Date Range field:** See the "Simple Search" topic, above, for more information.
- Select *Show Content items that do not display the latest approved version* to include all versions of content items in the search.

Concurrent Program to Migrate Data

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, iStore Oracle Content Manager Integration Migration. The profile option IBE: Use Content Management Integration should be set to "Yes" when migrating data from releases prior to R12.

Important: Please make sure the profile option, IBC: Use Access Control, is set to No at site level before running the data migration concurrent program.

Both existing and new customers who want to use the OCM integration must run the concurrent program **one time** as a mandatory step to migrate the seed and customer

data.

Back up your system before performing the migration. Once the migration has occurred, you cannot reverse the migration.

Running the iStore Content Items Migration Concurrent Program

The migration script is implemented as a concurrent program that can be run in two modes:

- Evaluation mode --- The data is not migrated. Instead the concurrent program provides an output including a summary of the migrated data as well as any exceptions detected before the migration process.
- Execution mode --- In this mode, the data migration occurs.

See the chapter, *Concurrent Programs*, page 35-1, for instructions on how to run the concurrent program. Refer to *Oracle E-Business Suite Setup Guide* for complete details on Oracle Applications concurrent programs.

Understanding the OCM Integration Profile Option

When you run the iStore Content Items Migration concurrent program under **execution** mode, the concurrent program sets the profile option, IBE: Use Content Management Integration, to Yes, at site level.

Note: The concurrent program will only set the profile to Yes when run in execution mode.

Note that you cannot use this profile option to turn "off" the integration between Oracle iStore and Oracle Content Manager.

Concurrent Program Process Flow

The user will typically:

1. Run the concurrent program in evaluation mode to check if there is any exception.
2. If there are exceptions, the user can fix the exceptions by making the adequate set up in the Site Administration UI before running the migration script in execution mode.
3. The user then runs the concurrent program in execution mode.

Concurrent Program Parameters

The following table shows the concurrent program parameters:

OCM Migration Concurrent Program Parameters

Parameter	Field Type	Description
Running Mode (mandatory)	Drop down list	The drop down list contains two values: Evaluation and Execution Default value: Evaluation
Default Language (mandatory)	Drop down list	List Language Name in the drop down list. Default: User session Language. This parameter is used as a default language for ALL (language) and ALL (Site) mappings.

Migration Logic of Concurrent Program

As a pre-requisite, the migration script migrating attachments from the file system to the database has to be run. One has to make sure the migration script has been run successfully. Only attachments properly migrated in the database will be migrated in Oracle Content Manager.

The concurrent program executes the following steps (these are not exposed to the end user).

1. Categorization of the attachments. This can be done through file extension-OCM content type mapping.

When there is no corresponding OCM content type existing for a file extension, the attachment is migrated to a content item of type "media".

2. Analysis of media object source file mappings.

This step will report all the successful migrated attachments, and will highlight the exceptions -- when more than one source file mapped to different OCM content types needs to be merged under the same content item. The iStore administrator can define a new mapping to fix the exception; otherwise, the new content item will have the type "Media".

For all exceptions in conflict attachment type, the content item type is set to be "Media" no matter if it is seed media object or not.

File Extensions Used for Attachment Categorization

The following table shows the file extensions used to migrate attachments in the right content type:

File Extensions Used for Attachment Categorization

File Extension	Name of File Format	Content Type
*.jpg, *.jpeg, *.jfif, *.jpe	JPEG File Interchange Format	Image
*.png	Portable Network Graphics	Image
*.gif, *.gfa	Graphics Interchange Format	Image
*.html, *.htm	Hypertext Markup Language	HTML
Any other file extension	N/A	Media

Concurrent Program Output

The concurrent program generates an output, either in execution or evaluation mode. The concurrent program output includes:

- A summary of the migrated data
- A list of exception cases happening during the migration process
- A list of content items created and attachments successfully migrated during the migration process, grouped by media object

The table below lists the information presented in the concurrent program output

Oracle iStore Content Items Migration Concurrent Program Output

Prompt or column heading	Format	Description
Parameters section		

Prompt or column heading	Format	Description
Running mode	text	Either Evaluation or Execution, depending upon the parameter entered by the user.
Default language	text	Default language used as a default base language (Language Description)
SECTION 1 – Migration Summary		
Number of content items created	integer	Number of content items created during the migration process
HTML	integer	Number of content items of type HTML created during the migration process
Image	integer	Number of content items of type image created during the migration process
Media	integer	Number of content items of type media created during the migration process
SECTION 2.1 – Attachments with unknown file extension		
Attachment	240 char max (variable size)	Attachment access name. In the report, attachment names are not truncated and expand on the right (can be a long string since it may include file path as well as the file name).
SECTION 2.2 – Media objects with attachments of different types		
Media Access Name	40 char fixed size	Media access name

Prompt or column heading	Format	Description
Seeded	6 char fixed size	"Yes" for seeded mapping of media objects, "No" for non seeded mapping of media objects
Store name	40 char fixed size	Store name truncated to the first 40 characters
Language	30 char fixed size	Language description
Attachment	240 char max variable size	Attachment name
SECTION 3 – Migration detailed report		
Media access Name	40 char fixed size	Media access name
Content item code	45 char fixed size	Content item code
Store name	40 char fixed size	Store name truncated to the first 40 characters
Language	30 char fixed size	Language description
Attachment	240 char max variable size	Attachment name

Integrating Oracle iStore with Oracle iSupport

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle iSupport Chapter
- Overview of Oracle iSupport
- Overview of Oracle iStore Functionality with Oracle iSupport
- Integrating Oracle iSupport with Oracle iStore Site Management
- Using Oracle iSupport for Call Me Back Functionality

Overview of Integrating Oracle iStore with Oracle iSupport Chapter

This chapter describes the integration of Oracle iStore with Oracle iSupport.

Overview of Oracle iSupport

Oracle iSupport is a comprehensive Web-based customer service portal that empowers the users to receive self service and assisted service over the Internet. It provides a personalized self service experience to users for many functions.

A large majority of customer support questions are repetitive. By empowering the users to request service for their common support questions over the Internet and offering automated response mechanisms, Oracle iSupport enables service organizations to reduce the total cost of customer support.

Service organizations can increase customer satisfaction and remain competitive by empowering customers through self-service and self-administration. Not only does iSupport allow the users to take control of their support experience, but it also enables a support organization to provide closed loop customer support by seamlessly integrating with Oracle Telephony Manager, the call center-enabled agent-facing application.

Oracle iSupport accomplishes the following goals for a service organization:

- Reduces customer support costs by empowering customers to perform self-service tasks such as creating and tracking their service requests
- Enhances customer satisfaction by providing easy access to the same product information and knowledge base that the support organization uses to resolve customer issues
- Provides real time online transactional inquiries to customers on orders, returns, invoices, contracts, and payments
- Provides a platform for users to collaborate among themselves through forums

Overview of Oracle iStore Functionality with Oracle iSupport

You can utilize the integration with Oracle iSupport for the following:

- Support Site Management -- See the section, "Integrating Oracle iSupport with Oracle iStore Site Management"
- Call Me Back -- See the section, "Using Oracle iSupport for Call Me Back Functionality"

Integrating Oracle iSupport with Oracle iStore Site Management

You can integrate Oracle iSupport with Oracle iStore to provide a complete support dashboard from the Oracle iStore Customer UI. Using this dashboard, you can allow customers to navigate to Oracle iSupport pages and potentially access service requests, knowledge base, forums, and other Oracle iSupport features. If implemented, users of Oracle iSupport can select a universal navigation icon, called Return to Dashboard, to return to the Site Selection Page.

Summary of Site Management Options for Oracle iSupport

This section summarizes the options available in the site management integration.

Support Dashboard and Other Customer UI Options

Following are some of the Customer UI implementation options when integrating Oracle iSupport with Oracle iStore's site management capabilities:

- Create a Support Home Page with links to the Oracle iSupport application -- See the sections: "Support Home Page" and "Setting up a Support Site - Sample Scenario".
- Target content in bins, for example, a bin that allows customers to access service

requests and other features of Oracle iSupport. Support bins typically would be used in the Support dashboard page in the Support site or integrated site. Users can map those bins to the locations through Configurable Bin Layout. See the chapter, *Implementing the Catalog*, page 9-1, for information on Configurable Bin Layout. For information on seeded bins, see the *Oracle iSupport Implementation Guide* and the appendix, *Seeded Display Data*, page C-1.

- Allow Oracle iSupport users to navigate back to the site portal from Oracle iSupport -- See the section, "Enabling Sites Navigation Icon".
- Implement sites with targeted catalog and pricing information -- See the chapters, *Implementing the Catalog*, page 9-1, and *Implementing Site Management*, page 5-1.
- Map sections to specific templates designed to display your content items -- See the chapter, *Implementing the Catalog*, page 9-1.
- Leverage Oracle iStore's globalization features, such as multiple languages and currencies support -- See the chapter, *Implementing Globalization and Multi-Org Architecture*, page 17-1.

User Access Control and User Management Options

Following are some of the user management implementation options when integrating Oracle iSupport with Oracle iStore's site management capabilities:

- Restrict access to sites based on user responsibility.
- Support Oracle iSupport user types and registration.
- Customize user profile screens specifically for support customers.

Additional details are available later in this chapter. Also refer to the chapter, *Implementing User Management*, page 14-1.

Support Home Page

Support specialty sites (the main tab of which can display as Support Home Page) are associated to one responsibility associated to a menu that has support functions, enabled within the Quick Links bin. This bin displays the intersection of menu functions derived by the user responsibility and the site responsibility. See the section, "Enabling the Quick Links Bin", for setup information. This navigation bin also can be displayed in a guest user site, so that guest users can access the knowledge base and other information that does not require login. A complete list of bins and supported content via Oracle iStore can be found in the Oracle iSupport documentation.

Setting up a Support Site - Sample Scenario

Following is a high-level example to set up a support site. Note that this is a sample scenario only. Your business requirements may dictate other methods of building sites.

1. Ensure that your user registration and approval processes are set up.
2. Create a site and assign it to the Support group.
3. Create your section hierarchy, with or without sections for products, depending upon your business requirements.
4. Name one of the top-level sections, Support.
5. Create subsections under Support, for example, Technical Library and Knowledge Base.
6. Assign the sections to the site you created in a previous step.
7. Assign one of the content-specific section Display Templates to the sections created above. the Display Templates are Multilevel Subsection List with Content and Section Detail. As a best practice, use Multilevel Subsection List with Content for non-Leaf sections, and Section Detail with Leaf sections.
8. Create content items and save them as HTML files.
9. Map the content files to media objects, either using the seeded ones or ones that you create.
10. Map the media objects to content components designed to show section additional information.
11. Map the content components at the section level, using the sections created above.
12. Set up the Quick Links bin.
13. Enable the Support group bin.

Enabling Sites Navigation Icon

To enable users to navigate back to the Customer UI from Oracle iSupport through a universal navigation icon called Return to Dashboard, you must link the seeded Site Selection and Site Home page functions to the Oracle iSupport menu root. After these two functions are mapped to the Oracle iSupport customer root menu, the navigation icon will appear at the top of the Oracle iSupport customer pages.

Important: If you implement the Dashboard navigation icon in Oracle iSupport, you

must also use the Oracle iStore site management, login, and user profile pages.

Following is the function data for the Site Selection Page and Site Home Page:

- **Site Selection Page:**
 - Function: IBE_C_SITE_SELECTION
 - User function name: iStore Site Selection Page
 - Type: JSP
 - HTML call: ibeCZzdMinisites.jsp

- **Site Home Page:**
 - Function: IBE_C_SITE_HOME
 - User function name: iStore Site Home Page
 - Type: JSP
 - HTML call: ibeCZzpHome.jsp

For data on the Oracle iSupport root menu, see the *Oracle iSupport Implementation Guide*.

Enabling the Quick Links Bin

You can enable a Quick Links bin on the Support dashboard to provide support users with links to Oracle iSupport features, such as service requests, knowledge base, and forums. Out-of-the-box, this bin is mapped to a JSP, but you must create a menu linked to a responsibility to allow users with the responsibility to see the bin.

The bin has the programmatic access name, STORE_QUICK_LINKS_BIN_IBEWC, and is mapped by default to the JSP, ibeCAcdQuickLinkBin.jsp.

Following are the steps to enable the bin:

1. All the links inside the Quick Links bin are retrieved from Oracle Applications (FND) menus. In Oracle Forms, navigate to Application Developer, Menu.
2. Create the Quick Links menu root. Then create all the menu entries under the quick link menu root (up to two levels allowed). You can use any submenus and functions that are already associated to the menu of the responsibility assigned to the site. Be sure to define prompts for all functions.

Important: Ensure that the menu tree does not have any functions with empty prompts.

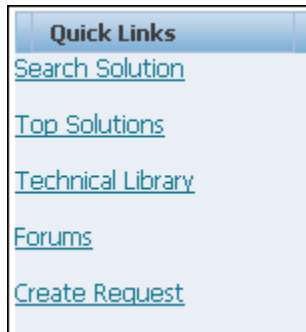
3. Save the menu.

4. Attach the Quick Links menu to the responsibility menu, directly under the user menu root (second level).
5. Set the prompt of the Quick Links menu root to empty.
6. Set the value of the profile option, IBE: Quick Links Menu, to the Quick Links root menu code. The corresponding responsibility is the one to which the quick links menu is assigned; thus, the value of the profile option should be the specific responsibility associated to the site.

All links inside the bin will be rendered as relative URLs. Thus, if the container page is non-secure, all the links inside the bin will be non-secure as well, and vice versa.

The figure below shows how the Quick Links bin might look in a site management implementation with Oracle iSupport. In the example image, the links shown are: Search Solution, Top Solutions, Technical Library, Forums, and Create Request.

Example Support Quick Links Bin



Enabling the Support Group Bin

Oracle iStore seeds a bin template which displays specialty sites associated to the group, Support. To display this group, map the logical template, `SUPPORT_GROUP_BIN_IBEWC`, to the bin layout component of your choice. See the section, "Using Configurable Bin Layout", in the chapter, Implementing the Catalog, page 9-1. See the appendix, Seeded Display Data, page C-1, for more information about the bin templates.

Oracle iStore Customer UI Access for Oracle iSupport Users

Oracle iStore restricts access to its Customer UI pages by checking users' responsibilities. Further restrictions are provided through user roles. The responsibilities your specialty sites will support must be associated to specific sites during setup. Oracle iStore supports all Oracle iSupport responsibilities, both seeded and non-seeded, provided that you map these responsibilities to sites. If a site allows guest user access, in the Site Selection Page, all specialty sites available to the guest user

are displayed.

For specific information on Oracle iSupport responsibilities, see the *Oracle iSupport Implementation Guide*.

Setting Profile Options for Pricing

In order for prices to display along with products in sites which support users of Oracle iSupport, set the following pricing profile options at the iSupport application level:

- **IBE: Pricing Event--Before Shopping Cart:** Set to Enter Order Line
- **IBE: Pricing Event for Shopping Cart:** Set to Batch Processing

Registration for Oracle iSupport Users

During registration, each Oracle iSupport end-user is assigned at least one responsibility through an association with his username. As with other Customer UI users, initial registration of Oracle iSupport users should be done through Oracle iStore. Setup and support of enrollments, approval processes, and user types is handled through the Oracle CRM Technology Foundation HTML pages.

When you integrate Oracle iSupport with the Oracle iStore registration flows, the default setup is to award users default Oracle iStore responsibilities and roles in addition to the Oracle iSupport responsibilities and roles. This setup allows a user to register and receive all required permission to access both Oracle iSupport and the Oracle iStore Customer UI.

To enable this setup in the case of a combined Oracle iSupport-Oracle iStore implementation, you can either map the user type to two enrollments -- one associated to Oracle iSupport responsibility and role and the other associated to Oracle iStore responsibility and role -- or you can create one enrollment associated to a custom responsibility that integrates Oracle iStore and Oracle iSupport menus, and mapped to Oracle iSupport and Oracle iStore roles.

Activate Enrollment for iSupport Users

By default, the Oracle iSupport enrollment is not active within the iStore user types. In the Oracle CRM System Administration console, activate the enrollment mapped to the appropriate user type.

Note that for Oracle iSupport users, both implicit and explicit enrollments are supported.

For more information, see the chapter, *Implementing User Management*, page 14-1, and the appendix, *Seeded User Data*, page B-1.

Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation

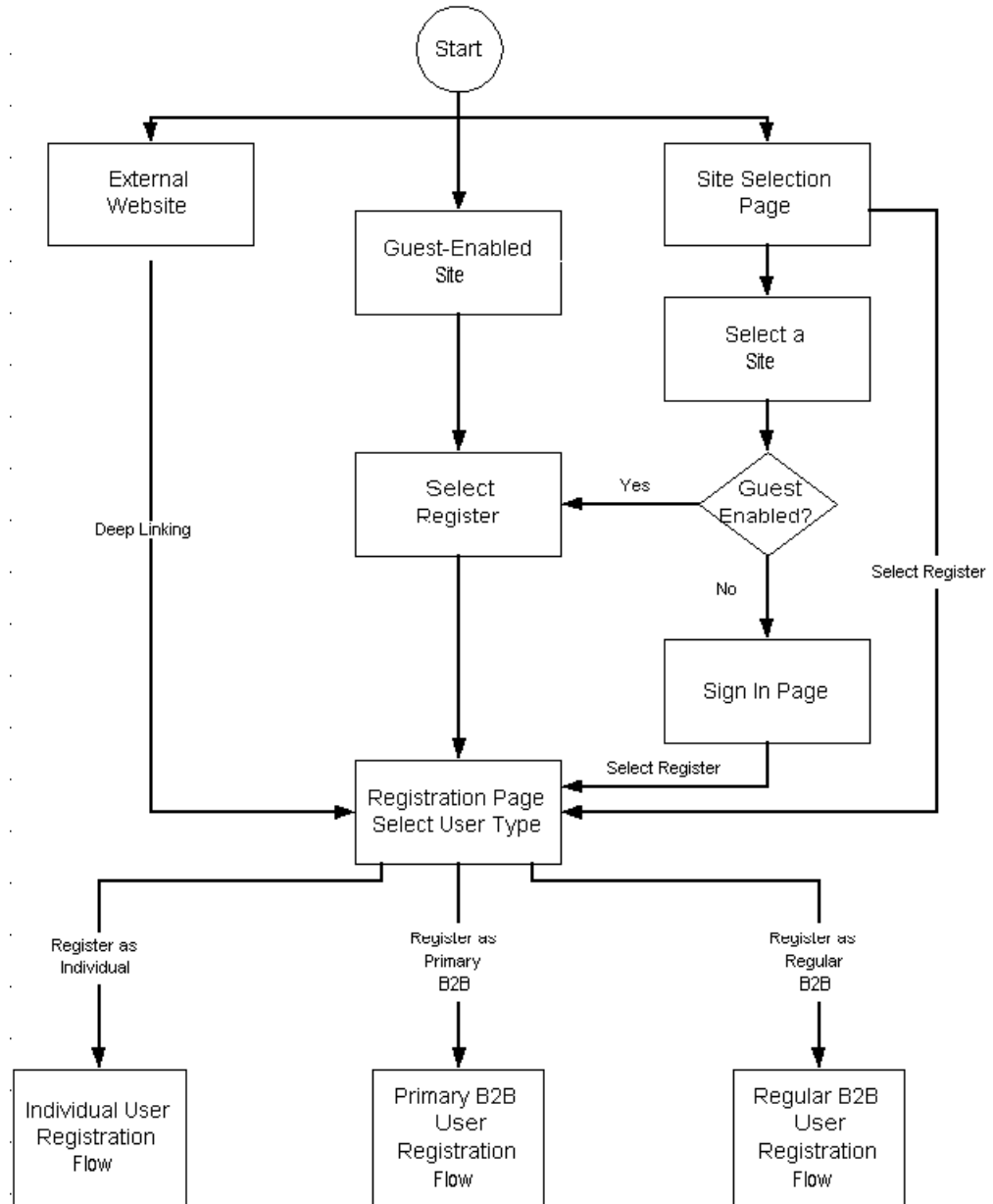
Following is a sample registration flow in a combined implementation of Oracle iStore

and Oracle iSupport, using Oracle iStore framework.

1. The user arrives at the registration page through one of the following paths:
 - From an external Web site, the user selects a deep link to the registration page.
 - The user navigates to the Site Selection Page and selects a site. If the site allows guest users, he is taken to the Site Home Page and can select the Register icon. If the site does not allow guest users, he is taken to the login page, and from there can select the Register icon.
 - The user navigates to the Site Selection Page and selects the Register icon.
 - The user accesses a site which allows guest users and selects the Register icon.
2. From the Registration page, the user selects the appropriate user type for which he is registering. Depending upon his user type selection, he follows one of the following registration flows:
 - Register as individual
 - Register your company
 - Register as a user of an existing company

The following diagram depicts the flow.

Sample Registration Flow: Oracle iStore-Oracle iSupport Implementation



Customizing Oracle iSupport User Profile Pages

Out-of-box, all of the user and company profile pages will display the seeded Oracle iStore profile menus. To enable the Oracle iSupport profile menus, follow the step in the section, "Steps to Configure Profile Menus", in the chapter, Implementing User Management, page 14-1.

Example Business Scenarios

The following sample business scenarios with Oracle iStore and Oracle iSupport implemented together, can enhance your understanding of the site management capabilities. See

Prerequisite: Activate the appropriate Oracle iSupport enrollment(s) within the desired Oracle iStore user type.

Sample Scenario 1 - Oracle iStore and Oracle iSupport Implemented in Same Site

In this sample scenario, Oracle iStore and Oracle iSupport are implemented in the same site.

Sample User Type/Enrollments Setup

For this scenario, the following are the enrollments associated to each user type:

Primary User:

- Enrollment1: Responsibility B
- Enrollment2: Responsibility F
- Enrollment3: Responsibility L
- Enrollment4: Responsibility P

Business User:

- Enrollment1: Responsibility C
- Enrollment2: Responsibility G
- Enrollment3: Responsibility M
- Enrollment4: Responsibility Q

Individual User:

- Enrollment1: Responsibility D
- Enrollment2: Responsibility H
- Enrollment3: Responsibility N
- Enrollment4: Responsibility R

Guest user:

- Assigned to Responsibility A

Sample Groups Setup

Sample groups defined are Group 1, North America, and Group 2, Europe. Each group has two sites within it, and each site has four supported responsibilities set up.

Group 1 - North America

- **Site 1 -- USA:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
 - Responsibility A = Oracle iStore and Oracle iSupport guest users
 - Responsibility B = Oracle iStore and Oracle iSupport primary users
 - Responsibility C = Oracle iStore and Oracle iSupport business users
 - Responsibility D = Oracle iStore and Oracle iSupport individual users
- **Site 2 -- Canada:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
 - Responsibility A = Oracle iStore and Oracle iSupport guest users
 - Responsibility F = Oracle iStore and Oracle iSupport primary users
 - Responsibility G = Oracle iStore and Oracle iSupport business users
 - Responsibility H = Oracle iStore and Oracle iSupport individual users

Group 2 - Europe

- **Site 3 -- UK:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
 - Responsibility A = Oracle iStore and Oracle iSupport guest users
 - Responsibility L = Oracle iStore and Oracle iSupport primary users
 - Responsibility M = Oracle iStore and Oracle iSupport business users
 - Responsibility N = Oracle iStore and Oracle iSupport individual users
- **Site 4 -- UK2:** This site is guest user enabled and restricted by responsibility. It is identified with following responsibilities:
 - Responsibility A = Oracle iStore and Oracle iSupport guest users
 - Responsibility P = Oracle iStore and Oracle iSupport primary users
 - Responsibility Q = Oracle iStore and Oracle iSupport business users

- Responsibility R = Oracle iStore and Oracle iSupport individual users

Usage Scenarios Related to Sample Enrollments and Groups

Use the sample user type/enrollment and groups setups in the following cases:

Case 1: Access to Site Selection Page as guest user - no group selected

1. The Site Selection Page displays all sites associated to Responsibility A.
2. User drills down into US site.
3. The Products tab displays the catalog.
4. User can browse the catalog as guest user.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. User selects the Support tab. The Support Home Page displays a bin that allows the user to access iSupport as guest user and also access knowledge base information.

Case 2: Guest user logs in as primary user from Site Selection Page - no group selected

1. The Site Selection Page displays all sites associated to responsibilities B, L, F, and P.
2. The user, associated to Responsibility B, drills down into US site.
3. The Products tab displays the catalog.
4. The user can browse the catalog and place orders.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. The user selects the Support tab. The Support Home Page displays a bin that allows the user to access iSupport as primary user and also access service requests, subscriptions and knowledge base functionality.

Sample Scenario 2 - Oracle iStore and Oracle iSupport Implemented in Different Sites

In this sample scenario, Oracle iStore and Oracle iSupport are not implemented in the same site.

Sample User Type/Enrollments Setup

For this scenario, the following are the enrollments associated to each user type:

Primary User:

- Enrollment1: IBE_CUSTOMER

- Enrollment2: Responsibility 3

Business User:

- Enrollment1: IBE_CUSTOMER
- Enrollment2: Responsibility 4

Individual User:

- Enrollment1: IBE_CUSTOMER
- Enrollment2: Responsibility 2

Sample Groups Setup

Sample groups defined are Group 1, North America, and Group 2, Europe. Each group has three sites within it.

Group 1 -- North America

- **Site 1 -- USA:** This site is guest user enabled and not restricted by responsibility.
- **Site 2 -- Canada:** This site is guest user enabled and not restricted by responsibility.
- **Site 3 -- Support:** This site is guest user enabled and is restricted by responsibility. It supports the following responsibilities:
 - Responsibility 1: iSupport individual guest user
 - Responsibility 2: iSupport individual registered user
 - Responsibility 3: iSupport B2B primary user
 - Responsibility 4: iSupport B2B non-primary user

Group 2 -- Europe

- **Site 4 -- UK:** This site is guest user enabled and not restricted by responsibility.
- **Site 5 -- France:** This site is guest user enabled and not restricted by responsibility.
- **Site 3 -- Support:** This site is guest user enabled and is restricted by responsibility. It supports the following responsibilities:
 - Responsibility 1: iSupport individual guest user
 - Responsibility 2: iSupport individual registered user
 - Responsibility 3: iSupport B2B primary user

- Responsibility 4: iSupport B2B non-primary user

Usage Scenarios Related to Sample Enrollments and Groups

Use the sample user type/enrollment and groups setups in the following cases:

Case 1: Access to Site Selection Page as guest user - no group selected

1. The Site Selection Page displays all sites associated to Responsibility A.
2. User drills down into US site.
3. The Products tab displays the catalog.
4. User can browse the catalog as guest user.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. User selects the Support Site link. The Support Home Page displays a bin that allows the user to access iSupport as guest user and also access knowledge base information.

Case 2: Guest user logs in as primary user from Site Selection Page - no group selected

1. The Site Selection Page displays all iStore and iSupport sites for primary users (Responsibility 3).
2. The user, associated to Responsibility 3, drills down into U.S. site.
3. The Products tab displays the catalog.
4. The user can browse the catalog and place orders.
5. The Site Home Page also displays a bin that shows all sites belonging to North America group.
6. The user selects the Support tab. The Support Home Page displays a bin that allows the user to access iSupport as primary user and also access service requests, subscriptions and knowledge base functionality.

The figure below shows an example of how the Site Selection Page might look in an implementation of Oracle iStore and Oracle iSupport. In the example, the page is set up in multiple-column format. At the top of the page, the company (in this example graphic, the company is Vision Enterprises) logo displays. Under the logo, the language list appears. At the top of the central portion of the screen, the text, Select Your Site, directs users to choose a specialty site from within the two main groups presented. Language hyperlinks -- reading, for example, English and French -- display under the name of each specialty site. Users select the language link to access the Site Home Page

for the specialty site. In the graphic presented here, there are two main groups -- the first group, North America, represents stores (specialty sites) set up for users to purchase products; the second group, Europe, represents support sites where users can access Oracle iSupport functionality.

Example Site Selection Page: Different Store and Support Sites



The figure below shows an example of how the Oracle iSupport Dashboard might look in an implementation of Oracle iStore and Oracle iSupport. The graphic example shows a Web page set up in multiple-column format. At the top of the page, the company (in this example graphic, the company is Vision Enterprises) logo displays. At the top of the central portion of the screen, the text, Welcome! Amy Millers, displays, with an image below this title, and some welcome text to the right of the image. Along the left portion of the screen, several bins display: the Oracle iStore Browse Bin, a Promotions bin, and the Oracle iStore Global Bin. The Browse Bin has the text, Browse, at the In the central portion of the web page, the text, Support Levels, displays, with four main areas listing example levels of customer support: Platinum Support, Silver Support, Gold Support, and Bronze Support. Bulleted text displays underneath each of the Support headings. Along the right side of the web page, two bins display: Quick Links and Alerts. The Quick Links bin has the text, Quick Links, at the top of the bin, and hyperlinks to areas of the Oracle iSupport application below the title. The links shown in the graphic are: Service Requests, Knowledge Base, Accounts, Forums, and Subscriptions. The Alerts bin has the text, Alerts, at the top of the bin, and hyperlinks to areas of the Oracle iSupport application below the title. The hyperlinks in the Alerts bin are: Review Support Alerts, Power Outage, New Virus, Safeguard Your Data, and Password Reset.

Example Support Dashboard



Using Oracle iSupport for Call Me Back Functionality

By integrating iStore with iSupport, Oracle iStore provides call-me-back functionality whereby customers can select a link in the Customer UI's welcome bin to request a call from a merchant representative. The call request is processed in the Oracle Telephony Manager call center.

The callback feature requires integration of Oracle iStore with Oracle iSupport and Oracle Telephony Manager. See the *Oracle iSupport Implementation Guide* for details.

Setting up Call Back in Oracle iStore

After setting up Oracle iSupport and Oracle Telephony Manager, set the following profile option at the application level to iStore.

- **IBE: Use Call Me Back:** Set to Yes to activate the callback feature.

The profile option defaults to No if not set.

Integrating Oracle iStore with Oracle Marketing

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Marketing Chapter
- Overview of Oracle Marketing
- Oracle iStore-Oracle Marketing Integration Overview
- Oracle Marketing Products Integration
- Using Oracle Marketing to Provide Content in the Customer Application
- Campaign Source Code Tracking
- Offer Source Code Tracking

Overview of Integrating Oracle iStore with Oracle Marketing Chapter

This chapter describes the integration of Oracle iStore with Oracle Marketing.

Overview of Oracle Marketing

An integrated part of the Oracle E-Business Suite, Oracle Marketing is a complete marketing automation application -- it helps companies win and retain profitable customers by enabling marketers to plan, execute, analyze, and optimize overlapping customer-focused programs.

See the *Oracle Marketing Implementation Guide* for more information.

Implementing Oracle Marketing

Install and set up Oracle Marketing according to the latest *Oracle Marketing Implementation Guide*.

Oracle iStore-Oracle Marketing Integration Overview

Oracle iStore can leverage the following components of Oracle Marketing functionality:

1. **Product Creation/Management:** Oracle Marketing's Products screens, if integrated, allow you to create and manage products from within the Site Administration Application. See the section, "Oracle Marketing Products Integration", below, for details.
2. **Marketing Content Postings:** Oracle Marketing's eMerchandizing module allows you to create marketing material that can be displayed on an Oracle iStore Customer Application page, and to create rules that determine the content for a given posting. See the section, "Using Oracle Marketing to Provide Content in the Customer Application", below, for details.
3. **Campaign and Offer Source Code Tracking:** You can use Oracle Marketing to track campaign source codes and offer (promotion) source codes. See the sections, "Campaign Source Code Tracking" and "Offer Source Code Tracking", below, for more information.

Oracle Marketing Products Integration

Oracle Marketing integration provides enhanced product creation and management capabilities for Oracle iStore in the Site Administration Application, including:

- Product creation
- Product template creation and maintenance
- Product maintenance, including updating Inventory and Order Management product attributes
- Product assignment to Inventory organizations
- Product assignment to Inventory categories
- Price list maintenance, including changing item prices and Units of Measure (UOMs)
- Oracle Bills of Material (BOM) definitions, including specifying item sequence, item, and quantity. Note that only standard bundling is supported.

This chapter discusses these capabilities in general terms. For specific, step-by-step instructions on how to use the Oracle Marketing screens, please refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

Note: Regardless of whether you are integrating with Oracle Marketing, the product

search in Oracle iStore (both Site Administration Application and Customer Application) will **not** retrieve products whose Web Status is set to Disabled (and Customer UI will not retrieve products which are Unpublished).

Products Functionality with Oracle Marketing Integration

Following the successful integration of Oracle iStore and the Oracle Marketing Products module, the Site Administration application will reflect the changes discussed in the following.

Catalog Tab Changes

In the Catalog tab of the Site Administration UI --- under the Products subtab's Planning menu (accessible by updating a product) --- the following functionality is available (the relevant reference sections are listed next to the functionality):

- Create and Maintain Products: See "Product Creation and Maintenance Overview".
- Define Product Options/Attributes: See "Selecting Product Options/Attributes".
- Assign Products to Categories: See "Assigning Products to Categories".
- Assign Products to Inventory Organizations --- See "Assigning Products to Organizations".
- Assign Prices to Products: See "Assigning Products to Price Lists".
- Create and Maintain Model Bundles: See "Maintaining Model Bundles".

Advanced Tab Changes

In the Advanced tab of the Site Administration Application, the Product Templates subtab is available following successful integration. Use this subtab to create new product templates and maintain existing ones. The templates determine the Oracle Inventory options or attributes that are available during product creation. See the section, "Creating New Product Templates", below, for more details.

Product Creation and Maintenance Overview

Integration of Oracle Marketing's Product screens allows Oracle iStore administrators to define new products and update existing product details from the following Site Administration Application menu paths:

- Catalog > Products (update product)
- Advanced > Product Templates

Products created in the Site Administration Application are immediately stored in the

same database tables as products created in Oracle Inventory using Oracle Forms.

Two types of products can be created:

- Inventory items: These include tangible items such as books, clothing, appliances, and computers.
- Service items: Currently, only warranties are supported as a newly created product through the Site Administration application.

Oracle iStore provides a default inventory template and a default service template. These can be viewed and their attributes managed in the Advanced > Product Templates menu in the Site Administration Application.

Templates have the following rules:

- Each template must link to an iStore administrator responsibility. By default, the two seeded product templates (one for service, one for inventory) are linked to the seeded iStore administrator responsibility.
- Only one responsibility can map to one template (of type inventory or service). You cannot map more than one responsibility to a single template.

See the section, "Creating New Product Templates", for more information on creating and working with the product templates.

Product Creation

This section contains general information about product creation using the Oracle iStore-Oracle Marketing product screens integration. For complete steps to create and maintain products using the Oracle Marketing product screens, refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

Create Product Process Flow

Following is the process flow for creating products using Oracle Marketing Products screens in the Oracle iStore Site Administration Application.

1. The Oracle iStore administrator logs into the Site Administration Application and navigates to the Catalog, Products pages.
2. The administrator selects the Create Product button in the Products summary screen.

If this button does not appear, see the section, "AMS: Item Validation Organization and IBE: Item Validation Organization", within this chapter, for profile option recommended settings.

3. In the Create Product screen, the administrator selects either the Product or the Service radio button, depending upon the type of product being created.

Each product type --- Inventory or Service --- has its own seeded template which determines the available attributes or options. Template attributes can be modified in the Advanced > Product Templates screen. See the section, "Creating New Product Templates", for more information on creating and working with the product templates. Information on seeded templates attributes can be found in the section, "Product Attributes in Seeded Product Templates".

4. In the Create Product screen, the Oracle iStore administrator defines the following:

- **Product Name:** This is a mandatory field.
- **Product Number:** The administrator can input the Product Number without entering the key flexfield page, as long as he uses the correct separator, and the combination of the segment values is unique and valid.

The page is refreshed when the administrator moves to the next field. At this point, an Oracle Inventory API validates the product number combination.

- **Key Flexfields:** For information on using the key flexfield icon (located next to the Product Number textbox), see the section, "Product Number and Key Flexfields", below. This is a mandatory field.
- **Owner:** The administrator can update this field by selecting the flashlight icon. The owner selected must be a CRM Resource. This field is automatically populated based on the resource associated to the Oracle iStore administrator user. See "Step 1 - Set up Oracle iStore Administrator as CRM Resource", for more details.
- **Product Type:** The administrator selects the product type, if desired. This is an optional field. In Oracle Inventory, the Product Type field can be used to further categorize products.
- **Description:** The administrator enters optional description.
- **Unit of Measure (UOM):** UOM is defaulted in Oracle Inventory based on the INV: Default UOM profile option. The administrator can select the flashlight icon to search for and retrieve other UOMs for the inventory organization listed in the Create Product page.
- The administrator selects Apply from the Create Product screen to save the newly created product, and then the Product Detail screen appears.
Note that the administrator can select the Clear button to cancel the product creation, before submitting the changes.
- After the product is created, the administrator can update the product through the Catalog, Products screens in the Site Administration Application. See the section, "Product Maintenance", for more information.

Update operations include the ability to access previously defined descriptive flexfields. See the section, "System Item Descriptive Flexfields (DFFs)", below, for more information.

Organization Where Product is Created

When administrators create a product using the Oracle iStore Site Administration Application, it is automatically assigned to the inventory organization defined in the profile options, IBE: Item Validation Organization and AMS: Item Validation Organization. See the section, "AMS: Item Validation Organization and IBE: Item Validation Organization", for profile option setting recommendations.

Administrators must then assign the product to the appropriate sub-organization, if desired. This task can be performed either in the Site Administration Application or in Oracle Forms using Inventory responsibility. See the section, "Assigning Products to Organizations", for more information on assigning products using the Site Administration application.

Templates Link to iStore Administrator Responsibility

Out-of-the-box, the Inventory and Service templates available with the Oracle Marketing Products integration are both tied to the Oracle iStore administrator responsibility. When the administrator selects the Product or Service radio button in the Create Product page, the template assigned to the user's responsibility is automatically applied when the product is saved, and controls the Inventory attributes available.

Product Number and Key Flexfields

The Key Flexfield (KFF) icon is displayed beside the Product Number field.

Users press the icon, and the Select Product Number Segments page displays, with textboxes to enter the Product Number Segments defined in the key flexfield setup in Oracle Inventory. In this page, the user must enter the segments defined in the KFF.

The figure below shows an example of the Select Product Number Segments page.

Select Product Number Segments Page

Select Product Number Segments		
Product Number Segment	Value	Description
*Item	<input type="text"/>	
Product Line	<input type="text"/>	

* Indicates a required field.

The values shown in the Product Number Segment textboxes depend on the KFF setup in Inventory. For example, if you have set up your KFF to be a list of values (LOV), then the KFF for the Product Number Segments textbox will be an LOV.

For more information on KFFs, see the *Oracle Inventory User Guide* and the *Oracle E-Business Suite Flexfields Guide*.

To continue with the product creation, the administrator enters the mandatory information in the textbox(es) and selects the Update button.

System Item Descriptive Flexfields (DFFs)

In Oracle Applications, system item descriptive flexfields (DFFs) are customized fields for entering additional information for which your Oracle Applications product has not already provided a field. For more information, see the *Oracle E-Business Suite User's Guide*.

If a DFF has been set up through Oracle Inventory, the additional attributes are displayed in the Product Detail page, where the administrator can complete the product definition with required and optional attributes.

Due to Oracle Marketing framework limitations, DFFs are displayed only in the Product Detail page -- not in the Create Product page -- thus, the site administrator must first create the product before accessing the DFFs.

In the Product Detail page, the following display options can be rendered using DFFs:

- Drop-down menus with predefined lists of values
- Text input fields with no format condition and no defaults
- Text input fields with no format condition and default values
- Text input fields with format conditions

- Text input field with search icon for LOVs that have more than 50 values
- Date fields
- Drop-down menus with values that depend on previous selection

Label definitions and LOV validations must be rendered according to the DFF setup in Oracle Inventory. If the DFF is not enabled, the DFF is not displayed in the page.

For more information, see the *Oracle E-Business Suite User's Guide* and the *Oracle E-Business Suite Flexfields Guide*.

Product Maintenance

This section contains general information about product maintenance using the Oracle iStore-Oracle Marketing product screens integration. For complete information on maintaining products using the Oracle Marketing product screens, refer to the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide*.

Following is the process flow for updating products using Oracle Marketing product screens in the Oracle iStore Site Administration Application.

1. The Oracle iStore administrator selects a product from the Products summary page, and then selects the Update button.
2. In the Product Detail page, the administrator can update or view the following information about the product:
 - **Product Name:** The administrator can update this field by entering new information into the textbox.
 - **Product Number:** This field is read-only during update.
 - **Owner:** The administrator can update this field by selecting the flashlight icon. The owner must be a CRM Resource. This field is automatically populated based on the resource associated to the Oracle iStore administrator user. See "Step 1 - Set up Oracle iStore Administrator as CRM Resource" for more details.
Note: Products that existed in Oracle iStore before the integration with Oracle Marketing's product screens will **not** display this field.
 - **Status:** The administrator can select this LOV to update product status.
 - **Inventory Organization:** This field is read-only and indicates the inventory organization defined in the profile option, IBE: Item Validation Organization (at its lowest level).
 - **Unit of Measure (UOM):** This field is read-only.
 - **Product Type:** The administrator can update this field by selecting from the

LOV.

- **Creation Date:** This field is read-only, and shows the creation date of the product in Oracle Inventory.
- **Description:** The administrator can update this field by entering new information into the textbox.

Assigning Products to Categories

Oracle iStore administrators use the Product Detail: Category Assignment page to assign products to Oracle Inventory categories within the default category set. For more information about how the default category set for Oracle iStore is determined, see the chapter, *Implementing Products*, page 7-1.

To retrieve the Category Assignment page, the Oracle iStore administrator selects a product from the Products summary page and then selects the Update button. From the Planning menu, he then selects the Categories link.

Note: In the Category Assignment page, the administrator must first remove a category and then add the replacement category in order to change the category assignment for a product.

Selecting Product Options/Attributes

When the Oracle iStore administrator initially creates a product in the Site Administration pages, the appropriate template is automatically applied. The options (attributes), however, can be changed through the Product Detail: Inventory Options page. To retrieve this page, the Oracle iStore administrator selects a product from the Products summary page and then selects the Update button. From the Planning menu, select the Inventory Options link.

See the section, "Product Attributes in Seeded Product Templates", for the list of attributes defined by default in each seeded template.

Assigning Products to Organizations

When the Oracle iStore administrator initially creates a product in the Site Administration Application, it is placed into the inventory organization defined in the profile option, IBE: Item Validation Organization. See the section, "AMS: Item Validation Organization and IBE: Item Validation Organization", for profile option setting recommendations. In order for the product to be available to sub-organizations under this inventory organization, it must be moved to the appropriate inventory organization using the Product Detail: Organization Assignments page. To retrieve the Product Detail: Organizations page, select a product from the Products summary page and then select the Update button. From the Planning menu, select the Organization Assignments link.

Assigning Products to Price Lists

When the Oracle iStore administrator initially creates a product in the Site Administration Application, it is not included in any price list. Therefore, he may wish to place it on a price list using the Product Detail: Price Lists page. To retrieve this page, select a product from the Products summary page and then select the Update button. From the Planning menu, select the Price List link. In the Price Lists page, administrators can assign a product to a previously created price list assigned to the appropriate inventory organization. See the sections, "Product Creation" and "Assigning Products to Organizations", for more information.

The Price Lists page includes the following fields or columns:

- **Name:** This column shows the price list name. To select a price list, the administrator can select the flashlight icon to retrieve an LOV of price lists from within the inventory organization specified at the top of the screen.
- **Currency:** This column shows the default currency for the price list.
- **Price:** This textbox allows the administrator to enter a price for the product into the price list. Use the format recommended in the *Oracle Order Management Implementation Manual Pricing* chapter.
- **UOM:** The administrator can set the unit of measure by selecting the flashlight icon.
- **Static Formula:** The administrator can select a static formula by selecting the flashlight icon.
- **Dynamic Formula:** The administrator can select a dynamic formula by selecting the flashlight icon.
- **Effective Dates:** Using the calendar icons in the Start Date and End Date columns, the administrator can enter the effective dates that the product will be available on the price list.

More information on pricing can be found in the chapter, *Implementing Pricing*, page 11-1, and the *Oracle Order Management Implementation Manual Pricing* chapter.

Maintaining Model Bundles

Using the Product Detail: Bundling page, the Oracle iStore administrator can create and maintain model bundles defining the following:

- Item sequence
- Item
- Quantity

To retrieve this page, select a product from the product summary page and then select the Update button. From the Planning menu, select the Bundling link.

Note: In the Oracle iStore Customer Application, only standard model bundles with mandatory option classes are supported. This functionality requires Oracle Bills of Material integration. For more information, see the chapter, Integrating Oracle iStore with Oracle Bills of Material, page 22-1.

For more information on creating bills of material, see the *Oracle Bills of Material Implementation Guide*.

Creating New Product Templates

The Oracle iStore administrator can use the Product Templates subtab in the Site Administration Application's Advanced tab to create custom product templates. Each template links to a responsibility, and for each responsibility the administrator may create only one Product and one Service template.

To create and enable a new template, do the following:

1. Create a new responsibility for the iStore Administrator.
2. Link the responsibility to the iStore-Marketing menus.
3. Create a new Product or Service template.
4. Set up the new template.

These steps are expanded upon in the following sections.

Create a New Responsibility for the iStore Administrator

In Oracle Forms, create a new responsibility, or copy the seeded iStore Administrator responsibility. See the *Oracle E-Business Suite Security Guide* for information on creating new responsibilities.

Link the Responsibility to the iStore-Marketing Menus

Link the new responsibility to the menu, using the following steps

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Security, Responsibility, Define.
3. Query for the new responsibility.
4. Associate the iStore Merchant Root menu with the new responsibility.

Create a New Product or Service Template

Create a new template, using the following procedure:

1. Log in to the Oracle iStore Site Administration Application and navigate to Advanced, Product Templates. The Product Templates page displays.
2. Select the Create Product Template button.
3. In the Create Product Template screen, enter the following:
 - **Template Name:** Enter a unique, descriptive name for the template.
 - **Type of template:** Select the radio button for either a Product or Service template.
 - **Description:** Optionally, enter a description for the template in the Description field.
4. Select Apply to save the changes. A confirmation message is displayed.

Set up the New Template

Set up the new template, as follows:

1. Log in to the Oracle iStore Site Administration Application and navigate to Advanced, Product Templates. The Product Templates page displays.
2. Select the hyperlink of the new template in the Product Templates screen.
3. In the Responsibilities block, select the flashlight icon to retrieve the Oracle iStore responsibility which will link to the template. Only one product template and one service template can be assigned to a responsibility.
Optionally, remove an assignment.
4. In the Attributes block, set the following parameters for each attribute.
 - **Default:** Select this to make an attribute part of the template by default.
 - **Editable:** Select this to make an attribute updateable in the product screens. This field overrides the Hide field. If you select Editable, Hide is ignored.
 - **Hide:** Select this to make the attribute hidden in the product screens. This is overridden by a selected Editable parameter.

See the section, "Product Attributes in Seeded Product Templates", for the list of attributes defined by default in each seeded template.

See the *Oracle Marketing Implementation Guide* and the *Oracle Marketing User Guide* for more information on product templates.

Product Attributes in Seeded Product Templates

Different Oracle Inventory attributes can be assigned to a product, depending upon the type of product created, Inventory or Service. If an Inventory product has been created, the attributes screen will display the specific Oracle Inventory and Oracle Order Management attributes; if the Service option has been selected, the specific Service default attributes will be displayed. The tables in this section list the seeded attributes for each of the two seeded Oracle iStore product templates.

Oracle iStore Product Template Attributes

The following table shows the attributes for the seeded Oracle iStore Product template.

Oracle iStore Product Template Attributes

Attributes	Default	Editable	Hide
Inventory Attributes			
Inventory Item	Yes	Yes	No
Stockable	Yes	Yes	No
Transactable	Yes	Yes	No
Revision Control	Yes	Yes	No
Bill of Material Attributes			
BOM Allowed	No	Yes	No
BOM Item Type	Standard	Yes	No
Pick Components	No	Yes	No
Costing Attributes			
Cost Enabled	Yes	Yes	No
Physical Attributes			
Collateral Item	No	No	No

Attributes	Default	Editable	Hide
Electronic Format	No	No	Yes
Downloadable	No	No	Yes
OM Indivisible	Yes	Yes	No
Unit Weight	Null	Yes	No
Weight UOM	Null	Yes	No
Order Management Attributes			
Customer Orderable	Yes	Yes	No
Customer Order Enabled	Yes	Yes	No
Internal Orderable	Yes	Yes	No
Shippable	Yes	Yes	No
Returnable	Yes	Yes	No
Activation Required	No	No	Yes
Assemble to Order	No	Yes	No
Invoicing Attributes			
Invoiceable	Yes	Yes	No
Invoice Enabled	Yes	Yes	No
Service Attributes			
Serviceable	No	Yes	No
Defect Tracking	No	Yes	No

Attributes	Default	Editable	Hide
Install Base	No	Yes	No
Subscription Dependency Enabled	No	No	Yes
Billing Type	Null	Yes	No

See the *Oracle Inventory User's Guide* for more information on the meanings of these attributes.

Oracle iStore Service Template Attributes

The following table shows the attributes which are included in the seeded Oracle iStore Service template.

Oracle iStore Service Template Attributes

Attributes	Default	Editable	Hide
Costing Attributes			
Cost Enabled	Yes	Yes	
Physical Attributes			
Collateral Item	No	No	Yes
Electronic Format	No	No	Yes
Downloadable	No	No	Yes
OM Indivisible	No	No	No
Unit Weight	No	No	Yes
Weight UOM	No	No	Yes
Order Management Attributes			

Attributes	Default	Editable	Hide
Customer Orderable	Yes	Yes	No
Customer Order Enabled	Yes	Yes	No
Internal Orderable	Yes	Yes	No
Activation Required	No	No	Yes
Assemble to Order	No	Yes	No
Invoicing Attributes			
Invoiceable	Yes	Yes	No
Invoice Enabled	Yes	Yes	No
Service Attributes			
Defect Tracking	No	Yes	No
Support Service	Null	Yes	No
Coverage Template	Null	Yes	No
Duration Value	No	Yes	No
Duration Period	No	Yes	No
Web Attributes			
Orderable on the Web	Yes	No	No
Web Status	Yes	Yes	No

See the *Oracle Inventory User's Guide* for more information on the meanings of these attributes.

Implementing Oracle Marketing Products Integration

After applying Oracle iStore and its Oracle Marketing prerequisites, the following post-installation steps must be performed to enable the Oracle Marketing integration.

- Step 1 - Set up Oracle iStore Administrator as CRM Resource
- Step 2 - Modify Oracle iStore Menu
- Step 3 - Set Profile Options
- Step 4 - Run Load Categories Concurrent Program
- Step 5 - Recompile the Key Flexfield Segments

Step 1 - Set up Oracle iStore Administrator as CRM Resource

When integrating with Oracle Marketing Products screens, the Oracle iStore administrator must be set up as a resource understood by Oracle Resource Manager.

Prerequisites

- The Oracle iStore administrator has been set up. See the chapter, Implementation Tasks for Oracle iStore, page 4-1.
- The Resource Manager module of the Oracle Common Application Components (formerly called Oracle CRM Application Foundation) is a prerequisite to setting up a user as a resource. Implement Oracle CRM Application Foundation Resource Manager module according to the most recent *Oracle Common Application Components Implementation Guide*.

Create an Employee

You may use the following steps to create an employee:

1. Log in to Oracle Forms with Human Resources responsibility.
2. Navigate to People, Enter and Maintain. Create an employee.

See *Using Oracle HRMS - The Fundamentals* for more information on setting up employee users.

Associate Employee to Oracle iStore Administrator User

Associate the newly created employee to the user who is the Oracle iStore administrator:

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Security, User, Define.

3. Assign the employee created in the step above to the user who is the iStore administrator.

See the *Oracle E-Business Suite Security Guide* for more information.

Import Employee as Resource

Import the newly created employee as a CRM Resource. Import the employee only after the association with the user has been made.

1. Log in to Oracle Forms with CRM Resource Manager responsibility.
2. Navigate to Maintain Resource, Import Resources.
3. Search for the employee created above and select Create Resource.

See the *Oracle Common Application Components Implementation Guide* for more information.

Step 2 - Modify Oracle iStore Menu

In order for the Oracle Marketing menus to appear in the Site Administration Application, you must replace some of the default Site Administration Application menus with Oracle Marketing Products menus.

Important: Avoid using the seeded SYSADMIN user to log into Oracle Forms and make the menu prompt changes. Use another user to login and make the changes.

Note: Since you will be modifying only the submenus underneath the iStore Root menu assigned to the iStore Administrator, the submenus will be automatically associated to the iStore Administrator responsibility.

1. Log in to Oracle Forms as a user other than SYSADMIN, using Application Developer responsibility.
2. Navigate to Application, Menu. The Menus window opens. Use the Menus functionality to do the following:
3. Within the iStore Catalog tab menu (IBE_M_CATALOG):
 1. Remove the Products prompt from submenu iStore Products sub tab (IBE_M_CATALOG_PRODUCTS).
 2. Set the Products prompt to submenu iStore and Marketing Products subtab (IBE_M_CATALOG_PRODUCTS_AMS).
 3. Save the changes.
4. Within the iStore Merchant root menu (IBE_M_MENU_ROOT):

1. Remove the Advanced prompt from submenu iStore Advanced tab (IBE_M_ADVANCED).
 2. Set the Advanced prompt to submenu iStore and Marketing Advanced tab (IBE_M_ADVANCED_AMS).
 3. Save the changes.
5. Remember to bounce the Application server after making these changes.

For complete instructions on how to modify menus and functions, see the *Oracle E-Business Suite Security Guide*.

Step 3 - Set Profile Options

Set or verify the profile options in this section.

AMS: Item Validation Organization and IBE: Item Validation Organization

Set the AMS: Item Validation Organization and IBE: Item Validation Organization profile options at site and application levels to the Master Inventory Organization. Refer to the *Oracle Marketing Implementation Guide* for more information on how Oracle Marketing uses this profile option.

Important: Item Validation Profile Options and the Create Product Button

When integrating with Oracle Marketing's Products screens, if the two item validation organization profile options do not match *at the same levels*, then the Create Product button will not display in the Site Administration Application's Catalog, Products menu. However, the Oracle iStore administrator still will have view and update privileges for products within the inventory organization of the IBE: Item Validation Organization profile option at its lowest-level setting.

For example, if you set the IBE: Item Validation Organization profile option at the iStore administrator responsibility level, then the Create Product button will be disabled, since it is not possible using out-of-the-box functionality to set the AMS: Item Validation Organization profile option at responsibility level. However, the iStore administrator still will be able to view and update products within the inventory organization specified in the IBE profile option at the responsibility level.

The Create Product button displays under the following conditions:

1. The Oracle Marketing menu changes have been implemented. Refer to Step 2 - Modify Oracle iStore Menu.
2. The profile options, IBE: Item Validation Organization and AMS: Item Validation Organization, match at the same levels.
3. The profile option, IBE: Use Advanced Product Setup, is set to Yes.

IBE: Use Advanced Product Setup

The profile option, IBE: Use Advanced Product Setup, controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Site Administration Application. To invoke Oracle Marketing's Product pages, set this profile option to Yes at the iStore application level. If set to No, then Oracle iStore's Product Detail pages will be retrieved. This profile is updateable at all levels.

Note that this profile option only controls the Product Detail pages used during product *update* operations.

AMS: Inventory Item Update Allowed

Set the Oracle Marketing profile option, AMS: Inventory Item Update Allowed, to Yes to allow items created in Oracle Inventory to be updated.

Refer to the *Oracle Marketing Implementation Guide* for more information on how Oracle Marketing uses this profile option.

OSO: Debug Messages On

Ensure that the profile option, OSO: Debug Messages On, is set to No at the iStore application level. If set to Yes, messages will appear in the Oracle Marketing-Oracle iStore product integration pages.

For more information on the Oracle Marketing profile options (AMS) and the Oracle Sales profile options (OSO), see the respective product implementation documentation.

Step 4 - Run Load Categories Concurrent Program

Run the concurrent program to load the Oracle Inventory categories information into the Oracle Marketing database tables. The concurrent program is AMS Load Inventory Categories. This allows the appearance of current product categories data in the Site Administration-Oracle Marketing pages.

Note that you only need to run the concurrent program after you create new categories in Oracle Inventory.

Following are high-level steps:

1. Log in to Oracle Forms with Marketing Manager responsibility.
2. Run the concurrent program, AMS Load Inventory Categories.

For more information, see the *Oracle Marketing Implementation Guide*.

Step 5 - Recompile the Key Flexfield Segments

In Oracle Applications, key flexfields (KFFs) are customized fields used to enter multi-segment values such as part numbers, account numbers, etc. You must recompile the key flexfield segments -- only once -- after creating them. If you do not perform this step, part numbers will appear as xxxxx in the Products pages. Following are quick

steps to recompile the KFF segments. For more information, see the *Oracle Inventory User's Guide*.

1. Log in to Oracle Forms with System Administrator responsibility.
2. Navigate to Application, Flexfield, Key, Segments.
3. Query on:
 - **Application:** Oracle Inventory
 - **Flex Title:** System Items (MTL_SYSTEM_ITEMS_B_KFV)
4. Recompile the key flexfield by selecting the Compile button.

For more information on DFFs in iStore, see the chapter, *Advanced Display*, page 36-1. For general information on DFFs, see the *Oracle E-Business Suite Flexfields Guide*.

Using Oracle Marketing to Provide Content in the Customer Application

The content you define in Oracle Marketing can be displayed in seeded bins in the Customer Application, through the use of Oracle iStore's Display Template functionality.

The out-of-the-box Display Templates that are candidates for marketing postings include:

- Section page bins
- Item page bins
- Shopping cart page bins

Each of these pages has seven left bins, seven right bins, one top bin, and one bottom bin. Each bin is listed as a separate logical Display Template in the Oracle iStore template manager.

High-Level Steps for Creating and Posting Content with Oracle Marketing

Following is a high-level flow for creating and posting materials from Oracle Marketing in Oracle iStore's Customer Application catalog and shopping cart pages.

Note: These steps assume you have created at least one site and made it available in the Customer Application.

1. Set the profile option, IBE: Use Web Placements, to Yes to enable eMerchandising postings in the specialty sites. Set this at the application level to iStore, or if integrating with other Oracle E-Business HTML applications, set at site level.

2. Create Content --- Creating eMerchandising postings in Oracle Marketing. See the Oracle Marketing Implementation Guide for information about setting up Oracle Marketing.
3. Identify Display Templates --- Determine which Display Templates will display the content. See the "Seeded Display Data" appendix for a complete list of Display Templates.
4. Map Display Template to Content --- Associate the Display Template with the desired content (a JSP file), using the Display Template functionality. See the "Implementing the Catalog" chapter for more information.
5. View Posting --- When a user views your specialty site online, the Oracle iStore template that references the posting passes the user's party ID, specialty site, page type (section, item, or shopping cart), and top-level section ID or item ID if applicable, to Oracle Marketing. The Oracle iStore template also passes its bin location. Oracle Marketing's eMerchandising module creates a specialty site posting for the corresponding placement.

See the "Implementing Content" chapter for more information about how the Customer Application pages are displayed.

See the "Seeded Display Data" appendix for a complete list of Display Templates.

Campaign Source Code Tracking

You can use Oracle Marketing to track the campaign source code associated with click-through-destinations (CTDs), leads, and orders in the Oracle iStore Customer Application. Oracle Marketing campaign source code is tracked in the following places:

- In Oracle Interaction History when a user enters an Oracle iStore site from a deep link (a URL placed, for example, in a marketing e-mail or in an advertisement on a Web site). This tracking is done by Oracle Marketing; please refer to that product documentation for further details.
- At the quote/cart and item levels when an item is added to a cart
- At the order and item levels when a cart is converted into an order
- At the lead level for customer leads (via orders and abandoned carts) generated by Oracle iStore. See the chapter, *Integrating Oracle iStore with Oracle Sales Applications*, page 29-1, for more information on leads generated by Oracle iStore.

More information on using deep linking in Oracle iStore can be found in the chapter, *Advanced Display*, page 36-1.

Click-Through-Destination Tracking

Oracle Interaction History click-through-destination (CTD) tracking is executed by Oracle Marketing utilizing a tracking JSP. When a user clicks on a deep link or link generated by OMO with the final destination as an Oracle iStore site, the CTD responses are tracked in the Oracle Interaction History tables. No tracking is done in Interaction History if the URL is not generated through OMO. Following are the parameters tracked:

- Campaign Source Code
- Party ID
- Time and date of the click-through
- Site ID
- Application Handler ID (iStore's application ID)

The behavior in tracking Party ID varies under different deep link conditions:

- Scenario 1: The user is coming from a banner and does not have an active session in which he is identified. The party is tracked as GUEST USER in the Interaction History record.
- Scenario 2: The user is coming from a banner and has an active session where he is identified. The Party ID of the user is tracked in the Interaction History record.
- Scenario 3: The user clicks on a deep link sent via e-mail. The Party ID of the user is decrypted and tracked in the Interaction History record.

If Site ID is not available for tracking, the record will still be created.

To enable click-through tracking in Interaction History the profile AMS: Interaction Logging Enabled must be set to Yes at the site level. See the *Oracle Marketing Implementation and Administration Guide* for more information.

Session Tracking of Campaign Source Code

Campaign source code is tracked at cart and item levels when a deep link performs the following actions:

- Add item to cart
- View section
- Catalog home

- View item details

Campaign source code tracking enforces the following rules:

1. The campaign source code is tracked in the session (only one campaign source code is kept in the session). The campaign source code in the session is always the last one. Note that what we define by a session starts as soon as the user browses the store (as an anonymous user) and continues even if the user logs in. The session stops when: (a) either the user logs out; or (b) or when the user quits the site for a time greater than the Oracle Technology Foundation (JTF) session expiration time-out. The campaign source code in the session is the last one because the last one is the one that should be tied to the cart. Let us review this scenario: The user comes to Oracle iStore from Yahoo! and does not create a cart, then goes to Google and then goes to the store and create a cart. In that case the cart should be associated with Google not Yahoo!.
2. The campaign source code tracked at the cart header level is the campaign source code stored in the session just *before* the user has created the cart (independent of the cart creation method: from the catalog, from the direct order entry form, or any other method available in Oracle iStore).
3. The campaign source code tracked at the cart line level is the campaign source code stored in the session just *before* the user has added the product to the cart (independent of the line creation: by adding an item in the catalog, by adding an item from the direct order entry form, or any other method available in Oracle iStore).
4. If no campaign source code is tracked in the session, no source code (null value) is tracked in cart header and cart lines created at this time.
5. When cart headers and cart lines are merged, the information stored in the cart header and/or cart line created first prevails, even if there is no campaign source code tracked (null value).
6. When lines are split, the same campaign source code is kept in the split lines.

Below are a few scenarios that can happen:

Scenario 1: Simple Cart Creation

An anonymous user enters an Oracle iStore site via a deep link. The campaign source code (SC1) is tracked in the session. The user adds an item to the cart. SC1 is attached to the cart at the header level and at the line level.

Scenario 2: Cart Merge Without Line Merge

An anonymous user enters an Oracle iStore site via a deep link and creates a cart, and then adds three lines to the cart (L3, L4, L5). A campaign source code (SC1) is attached to the cart at the header level and at the line level. The user then logs in and already has an active cart with a campaign source code (SC2) at the header level at the line level (for

lines L1, L2) . The two carts merge: The campaign that has created the initial cart (SC2) is kept at the header level. The campaign source codes at the line level are not affected since lines are not merged.

Scenario 3: Cart Merge With Line Merge

An anonymous user enters an Oracle iStore site via a deep link and creates a cart, and then adds three lines to the cart (L3, L4, L5). A campaign source code (SC1) is attached to the cart at the header level and at the line level. The user then logs in and already has an active cart with a campaign source code (SC2) at the header level at the line level (for lines L1, L2) . The two carts merge (and in this scenario the lines are merging as well):

- The campaign that has created the initial cart (SC2) is kept at the header level.
- Lines L3 and L1 are merging. The initial campaign source code (SC2) is kept at the line level.
- Line L4 and L2 are merging: The initial campaign source code (SC2) is kept at the line level.
- L5 is not affected: SC1 is kept at the line level for L5.

Scenario 4: Multiple Campaign Clicks in the Same Session

An anonymous user enters an Oracle iStore site via a deep link and creates a cart. A campaign source code (SC1) is attached to the cart at the header level and line level (for line 1). He visits another site and goes back to the Oracle iStore site through a different banner (SC2). SC2 is now in the session. An item is added to the cart (line 2). SC1 remains the campaign source code at the header level but SC2 is assigned to line 2.

Scenario 5: Cart Creation With No Campaign Clicks

A user browses an Oracle iStore site. No campaigns are being tracked in the session. The user creates a cart and adds products to the cart. In this scenario there is no campaign source code tracked at the header and line level (null value). If the user clicks on a campaign link (source code SC1) later on, still no campaign source code is tracked at the header and line level created *before* the user clicks the campaign link. For any lines added *after* the user clicks the campaign, the campaign source code SC1 is tracked at the line level.

Leads

Oracle iStore generates leads from past orders and expired carts. In order to identify these leads, the following information is available for every lead generated from Oracle iStore:

- Campaign source code
- Site ID

- Source of the lead (STORE)
- Quote header ID (of the cart the lead was generated from) of the lead

See the chapter, Integrating Oracle iStore with Oracle Sales Applications, page 29-1, for more information on leads generated by Oracle iStore.

Offer Source Code Tracking

For campaign schedule of type Internet Promotion (banner) the schedule might have an offer source code, also called promotion code. Only if the deep link that is in the banner adds an item/multiple items to the cart is offer source code passed to the cart where it might affect the price. However, if the deep link only directs the user to an Oracle iStore site, offer source code is not passed to the site and therefore cannot affect the price.

Note: Currently a campaign schedule of type E-mail Schedule does not support offer source code. Therefore no offer source code tracking is done in the scenario of an e-mail link.

When the deep link destination is Catalog Home, View Section or View Item Details, offer source code is tracked in the user's session (as defined previously in the campaign source code section). During a given session, only one offer source code is kept in the session, and as with campaign source code, the offer source code in the session will always be the last one clicked on. Offer codes are tracked at the cart header level (rationale: the offer code will be applied even if defined at the line level in pricing).

Whenever an item is added to the cart, the offer source code in the session should be added to the cart at the header level (unless the offer source code is already there). This means that several source codes can be in the cart header at the same time. Oracle Advanced Pricing then determines whether or not the offer codes affect the price of the items present in the cart.

Note: Oracle iStore ensures that duplicate offer codes are not applied at the header level. For example, if a user clicks one time on a banner having the offer code O1, creates a cart, leaves the site, and then clicks again on the banner and adds a product again, the offer code O1 will be applied on the cart header only one time. In case of cart merges, the offer codes applied at the header level are merged – and the duplicates are removed. For example, the active cart (C1) has offer codes O1 and O2, and the user logs in. The cart merges with the active cart (C2) having offer codes O2 and O3 at the header level. In this case, the resulting cart has offer codes O1, O2 and O3 applied at the header level.

Integrating Oracle iStore with Oracle Partner Management

This chapter covers the following topics:

- Integrating Oracle iStore with Oracle Partner Management
- Overview of Oracle Partner Management
- Oracle iStore-Oracle Partner Management Integration Overview

Integrating Oracle iStore with Oracle Partner Management

This chapter describes the integration of Oracle iStore with Oracle Partner Management.

Overview of Oracle Partner Management

Oracle Partner Management is an integrated software solution for managing business partner relationships. It allows management of partner dashboards, partner profiling, and partner enrollments, and allows partner access to opportunities, referrals, deals, and special pricing.

See the *Oracle Partner Management Implementation Guide* for more information.

Test Object

test description

Implementing Oracle Partner Management

Install and set up Oracle Partner Management according to the latest *Oracle Partner Management Implementation Guide*.

Oracle iStore-Oracle Partner Management Integration Overview

You can integrate Oracle Partner Management with Oracle iStore to provide a partner dashboard in the Oracle iStore Customer UI. Using this dashboard, partners can navigate to Oracle Partner Management pages, potentially drilling down into:

- Sales opportunity summaries
- Trade management offers
- Claims summaries
- Customer information
- Forecast information
- Special offer requests
- Partner program enrollments

Summary of Site Management Options for Oracle Partner Management

This section summarizes the options available when you integrate with Oracle Partner Management.

Partner Dashboard and Other Customer UI Options

Following are some Partner dashboard and other Customer Application options:

- Set up a Partner Home Page with links to the Oracle Partner Management application -- See the sections, "Partner Home Page" and "Setting up a Partner Site - Sample Scenario".
- Target content in bins, for example, a bin that allows partners to enroll in specific programs, or a bin that links to other applications. Partner bins (except the Enrollment Left/Right Bins) typically would be used in the Partner dashboard page in partner site or integrated site. Users can map these bins to the locations through Configurable Bin Layout. The Enrollment Left/Right bins typically would be used in the Partner program enrollment page in the Partner site. See the chapter *Oracle Partner Management Implementation Guide* for more information. See the *Implementing the Catalog*, page 9-1, for information on Configurable Bin Layout. For information on seeded bins, see the *Oracle Partner Management Implementation Guide* and the appendix *Seeded Display Data*, page C-1, in this guide .
- Map sections to specific templates designed to show your Partner content items -- See the chapter, *Implementing the Catalog*, page 9-1, for more information.

- Implement sites with targeted catalog and pricing information, including specifying a price list for partner users -- See the chapters, *Implementing the Catalog*, page 9-1, and *Implementing Site Management*, page 5-1, for information.
- Allow Partner Management users to navigate back to the site portal from Oracle Partner Management -- See the "Enabling Sites Navigation Icon" section below.
- Leverage Oracle iStore's globalization features, such as multiple language and currency support.
- Allow partners to enroll in partner program memberships through the Oracle iStore Customer UI -- See the "Partner Program Enrollments" section, below.

User Access Control and User Management Options

Following are common user access control and user management options for your Partner users:

- Restrict access to sites based on user responsibility
- Support partner user types and registration
- Customize user profile screens specifically for partners

Additional details are available later in this chapter. Also refer to the chapter, *Implementing User Management*, page 14-1.

Partner Home Page

Oracle iStore supports Oracle Partner Management content and links in the post-login Partner Home Page, including:

- Available Programs --- Displays the list of programs available for enrollments
- Renewal-Upgrade --- Displays the list of programs in which the partner is enrolled; the partner can start the upgrade process or the renewal process if the program requires it
- Quick Links navigation bin --- Supports navigation to the Oracle Partner Management application

For information on program enrollments, see the *Oracle Partner Management Implementation Guide*. See also: "Enabling the Quick Links Bin", and "Summary of Site Management Options for Oracle Partner Management", in this chapter.

Setting up a Partner Site - Sample Scenario

Following is a high-level example to set up a partner site. Note that this is a sample

scenario only. Your business requirements may dictate other methods of building sites.

1. Ensure that your user registration and approval processes are set up.
2. Create a site and assign it to the Partner group.
3. Create a price list for partner users and assign it to the Partner field in the Site Administration Pricing page.
4. Create your section hierarchy, with or without sections for products, depending upon your business requirements.
5. Name one of the top-level sections, Partners.
6. Create subsections under Partners, for example, Hot Topics and Product News. Note that it is not necessary to create additional sections -- you can set up the hierarchy any way your business requirements mandate.
7. Assign the sections to the site you created in a previous step.
8. Assign one of the content-specific section Display Templates to the sections created above. As a best practice, use Multilevel Subsection List with Content for non-Leaf sections, and Section Detail with Leaf sections.
9. Create content items and save them as HTML files.
10. Map the content files to media objects, either using the seeded ones or ones that you create.
11. Map the media objects to content components designed to show section additional information.
12. Map the content components at the section level, using the sections created above.
13. Set up the Quick Links bin.
14. Map the Partners group bin as desired.

Partner Program Enrollments

The Oracle iStore registration framework also supports partner program enrollments. Oracle Partner Management's enrollment functionality provides vendors a convenient process to enroll partners into programs or memberships. Partners can initiate self-service program enrollment within the partner dashboard provided through the partner site implementation.

Once initiated, the partner will be guided through the process of completing an enrollment form, reviewing and signing a contract online, and submitting payment for

membership fees. The enrollment form, contract, and payment are elements that may not be necessary depending on the configuration of the process. Vendors can create enrollment forms using the Partner Program Management functionality. The program enrollment process also involves managing features such as:

- Online partner program self-service enrollment
- Automatic update of partner profile attributes
- Online submission of payments for membership fees
- Execution of payment processing
- Online display of program terms and conditions
- Online partner acceptance of program terms and conditions
- Proper approval routing following partner enrollment

For more information on partner program enrollments, refer to the Oracle Partner Management documentation.

Enabling Sites Navigation Icon

To enable users to navigate back to the Customer UI from Oracle Partner Management through a universal navigation icon called Return to Dashboard, you must link the seeded Site Selection and Site Home page functions to the Oracle Partner Management menu root. After these two functions are mapped to the Oracle Partner Management customer root menu, the navigation icon will appear at the top of the Oracle Partner Management customer pages.

Important: If you implement the Sites navigation icon in Oracle Partner Management, you must also use the Oracle iStore site management, login, and user profile pages.

Following is the function data for the Site Selection Page and Site Home Page:

- **Site Selection Page:**
 - Function: IBE_C_SITE_SELECTION
 - User function name: iStore Site Selection Page
 - Type: JSP
 - HTML call: ibeCZzdMinisites.jsp
- **Site Home Page:**
 - Function: IBE_C_SITE_HOME

- User function name: iStore Site Home Page
- Type: JSP
- HTML call: ibeCZzpHome.jsp

For data on the Oracle Partner Management root menu, see the *Oracle Partner Management Implementation Guide*.

Enabling the Quick Links Bin

You can enable a Quick Links bin on the Partner dashboard to provide partners with links to Oracle Partner Management features, such as deals, referrals, and opportunities. Out-of-the-box, this bin is mapped to a JSP, but you must create a menu linked to a responsibility to allow users with the responsibility to see the bin.

The bin has the programmatic access name, `STORE_QUICK_LINKS_BIN_IBEWC`, and is mapped by default to the JSP, `ibeCAcdQuickLinkBin.jsp`.

Following are the steps to enable the bin:

1. All the links inside the Quick Links bin are retrieved from Oracle Applications (FND) menus. In Oracle Forms, navigate to Application Developer, Menu.
2. Create the Quick Links menu root. Then create all the menu entries under the quick link menu root (up to two levels allowed). You can use any submenus and functions that are already associated to the menu of the responsibility assigned to the site. Be sure to define prompts for all functions.

Important: Ensure that the menu tree does not have any functions with empty prompts.

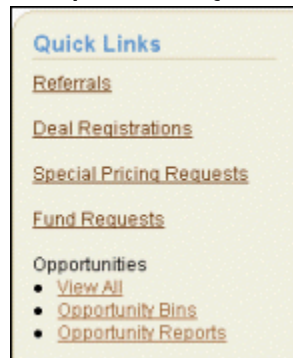
3. Save the menu.
4. Attach the Quick Links menu to the responsibility menu, directly under the user menu root (second level).
5. Set the prompt of the Quick Links menu root to empty.
6. Set the value of the profile option, `IBE: Quick Links Menu`, to the Quick Links root menu code. The corresponding responsibility is the one to which the quick links menu is assigned; thus, the value of the profile option should be the specific responsibility associated to the site.

All links inside the bin will be rendered as relative URLs. Thus, if the container page is non-secure, all the links inside the bin will be non-secure as well, and vice versa.

The figure below shows how the Quick Links bin might look in an implementation. The

example has the text, Quick Links, at the top of the bin, and hyperlinks to areas of the Oracle Partner Management application below the title. The links shown in the graphic are: Referrals, Deal Registrations, Special Pricing Requests, Fund Requests; and under an Opportunities section: View All, Opportunity Bins, and Opportunity Reports.

Example Partner Quick Links Bin



Enabling the Partners Group Bin

Oracle iStore seeds a bin template which displays sites associated to the group, Partners. To display this group, map the logical template, PARTNER_GROUP_BIN_IBEWC, to the bin layout component of your choice. See the section, "Using Configurable Bin Layout", in the chapter, Implementing the Catalog, page 9-1. See the appendix, Seeded Display Data, page C-1, for more information about the bin templates.

Oracle iStore Customer UI Access for Oracle Partner Management Users

Oracle iStore restricts access to its Customer UI pages by checking users' responsibilities. The responsibilities your specialty sites will support must be associated to specific sites during setup. Oracle iStore supports all Oracle Partner Management responsibilities, both seeded and non-seeded, provided that you map these responsibilities to sites. If a site allows guest user access, in the Site Selection Page, all specialty sites available to the guest user are displayed.

For specific information on Oracle Partner Management responsibilities, see the *Oracle Partner Management Implementation Guide*.

Setting Profile Options for Pricing

In order for prices to display along with products in sites which support users of Oracle Partner Management, set the following pricing profile options at the Partner Management application level:

- IBE: Pricing Event--Before Shopping Cart --- Set to Enter Order Line

- IBE: Pricing Event for Shopping Cart --- Set to Batch Processing

Registration for Oracle Partner Management Users

During registration, each Oracle Partner Management end-user is assigned at least one responsibility through an association with his username. As with other Customer UI users, initial registration of Oracle Partner Management users should be done through Oracle iStore. Setup and support of enrollments, approval processes, and user types is handled through the Oracle CRM Technology Foundation HTML pages.

Important: Registration through Oracle CRM E-Business Suite HTML login (JTF login) is not recommended. User types supported in Oracle iStore are not supported in JTF/JTA, since they are associated to Oracle iStore registration templates. If you register using JTF/JTA user types, users will not have access to the Site Selection Page and the partner sites.

Enable Partner Management User Types

Before allowing users to register through Oracle iStore, the registration page should be implemented to support Oracle Partner Management users. After it is set up to support Oracle Partner Management users, the page will display registration links for Oracle Partner Management users.

Follow the steps below to set up the registration page for Oracle Partner Management users:

1. Log in to the Oracle CRM System Administration Console.
2. Set the desired Oracle Partner Management user types as active. The Oracle Partner Management registration links will automatically be available in the New User Registration page.

Note that these steps also enable the partner user types for e-mail notifications.

For more information, see the chapter, *Implementing User Management*, page 14-1, and the appendix, *Seeded User Data*, page B-1.

See the *Oracle Partner Management Implementation Guide* for more information on Oracle Partner Management seeded user registration data.

Note: The seeded Oracle Partner Management enrollments are enabled by default. See the Oracle Partner Management documentation and the *Oracle E-Business Suite CRM System Administrator's Guide* for more information.

Sample Oracle Partner Management User Registration Flows

This section contains example user registration flows for Oracle Partner Management users.

Partner User Registration

Following is the registration flow for Oracle Partner Management users, both primary and non-primary. As a prerequisite, Partner User Type is defined in Oracle CRM Technology Foundation User Management framework.

Note: For the partner primary user registration flow, the impact on Oracle TCA storage is as follows:

- The organization is defined as party ID of type "organization"
 - The organization address is saved as "party address"
 - The user is defined as party relationship of "employee of" the partner organization
 - The user is defined based on the relationship "partner of" an internal organization
1. User chooses to register as a user for a partner organization. Primary and regular partner users select different links.
 2. The following information is displayed in the seeded registration page:
 - Organization Information: organization name, address and primary phone number
 - Personal Information: name, e-mail address, primary phone number and username and password
 3. Primary users select a partner type (previously defined in the Partner Management schema); note that partner type selection is not available for non-primary users
 4. The user indicates default currency and country
 5. The user submits the registration.
 6. The user receives an e-mail notification with username, password and organization identifier number.

At the submission level, the information is saved in the Partner Management, TCA and FND schema. A party relationship of "partner of" between the new party organization and the internal organization is also created. The user is also created as a resource and assigned to a resource group. The partner is also assigned to a profile, that will be populated with information when the partner will apply for a partner program
 7. Once the partner has completed the registration, an approval process can be launched if required.
 8. If the partner is auto-approved, the following target pages are displayed, based on

the starting point of the registration:

- Site Selection Page
- Site Home Page
- Checkout screen

9. If the partner is not auto-approved, the pending approval page is displayed.
10. During approval, the user is assigned a default responsibility based on the user type setup.

Note: Until the primary user has approved and assigned him roles and responsibilities, the non-primary user is not assigned to all responsibilities associated to the partner organization.

When the primary user approves the non-primary user, responsibilities need to be assigned and the partner profile needs to be populated.

11. Once the user has been approved and has access to the site dashboard, he can apply for a partner program:
 - If implemented, the list of available partner programs will be displayed in the partner Program Enrollment bin. Note that a program is an orderable item, associated with a default inventory organization.
 - The primary user selects one of the programs and starts the application.
 - Based on the program setup, the following steps can be implemented:
 - The user can be required to complete a questionnaire, defined in Oracle Partner Management. The results of the questionnaire are saved in the Partner Profile. If a user applies for another program and gives different answers to the questionnaire, the new answers overwrite the previous ones.
 - The user can accept a sales contract.
 - The user can enter billing information (in this case, an account is created in Oracle TCA).
 - The user can enter payment information
 - The user submits the program application.
 - An order is generated in order management in Entered status, associated to the operating unit mapped to the partner site responsibility.
 - The partner is directed to the partner dashboard and a message is displayed, saying that the program application needs to be approved.

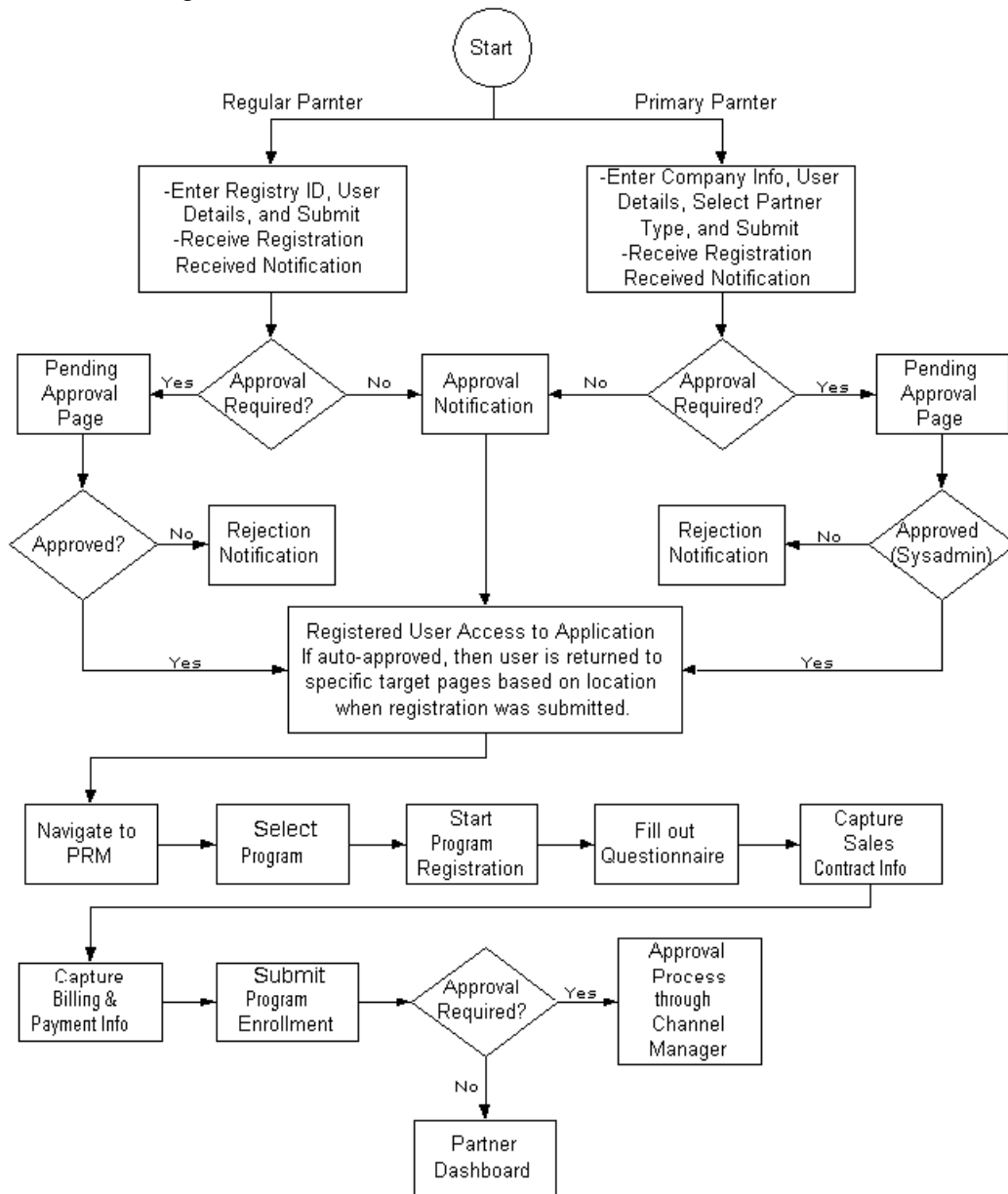
- The Vendor/Channel Manager approves or rejects the application. When the partner program application is approved, then the order is booked. If the partner program application is rejected, then the order is canceled.
- Once the program application is approved, the partner program membership status is changed.

Note: Partner Management users can navigate to Profile, My Company Profile, Membership to check the status of membership.

12. Based on the program benefits setup, the partner company is associated to additional privileges. Primary users might be assigned to specific Oracle iStore and Oracle iSupport responsibilities. Based on the partner dashboard setup, if the merchant has set up group navigations bin for Store and Support sites, the sites associated to these responsibilities will show up in the group bins. Also, based on the responsibility associated to the site and the responsibility associated to the user, the Quick Links bin will display links to Partner Management functionality.

The following diagram depicts the flow.

Partner User Registration Flow



Registration in Oracle Partner Management Implementation

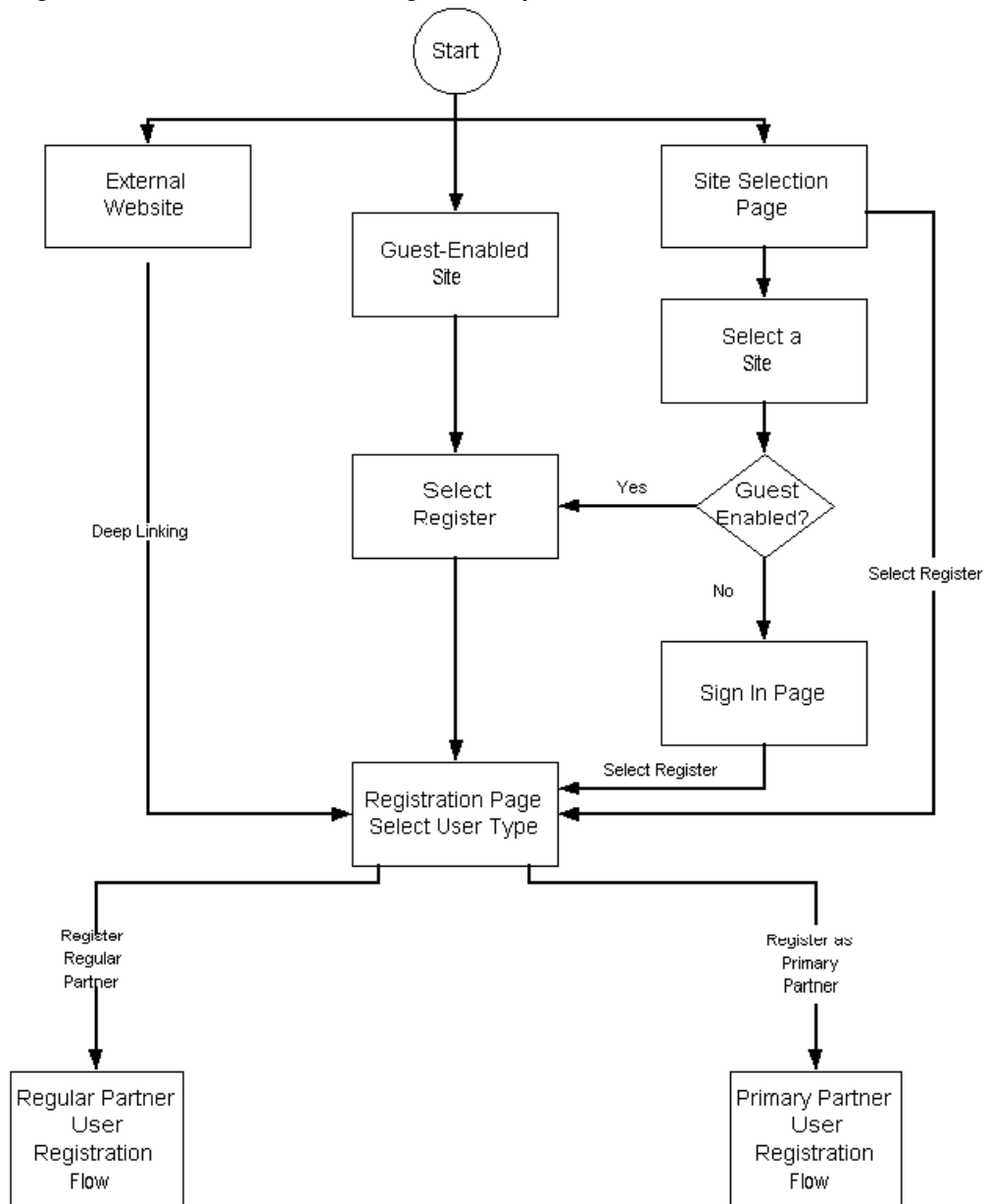
Following is the registration flow in an implementation of Oracle Partner Management using Oracle iStore framework.

1. The user arrives at the registration page through one of the following paths:
 - From an external website, the user selects a deep link to the registration page.

- The user navigates to the Site Selection Page and selects a site. If the site allows guest users, he is taken to the Site Home Page and can select the Register icon. If the site does not allow guest users, he is taken to the login page, and from there can select the Register icon.
 - The user navigates to the Site Selection Page and selects the Register icon.
 - The user accesses a site which allows guest users and selects the Register icon.
2. From the Registration page, if he is registering as a primary user, he follows the partner primary user registration flow; if he is registering as a non-primary user, he follows the partner non-primary user registration flow.

The following diagram depicts the flow.

Registration in Oracle Partner Management Implementation



Customizing Oracle Partner Management User Profile Pages

Out-of-box, all of the user and company profile pages will display the seeded Oracle iStore profile menus. To enable the Oracle Partner Management profile menus, follow the steps in the section, "Steps to Configure Profile Menus", in the chapter, Implementing User Management, page 14-1.

Setting Default Administrator for Partner Orders Errors

To specify a default username to receive a notification each time an error occurs during the partner ordering process, set the profile option, IBE: Order Administrator. See the "Profile Options" appendix for more information.

Example Business Scenarios

The following sample business scenarios with Oracle iStore and Oracle Partner Management implemented together, can enhance your understanding of the site management capabilities.

Prerequisite: Activate the appropriate Oracle Partner Management enrollment(s) within the desired Oracle iStore user type. When the user selects the enrollment during registration, he will receive both responsibilities, and will have primary user access in both applications. See the "Implementing User Management" chapter and the Oracle E-Business Suite CRM System Administrator's Guide for more information on how to set up enrollments.

Sample Scenario 1 - Oracle iStore and Oracle Partner Management Implemented in Same Site

In this sample scenario, Oracle iStore and Oracle Partner Management share site access.

Sample User Type/Enrollments Setup

For the scenarios below, the following is the user enrollment setup:

Partner Primary User:

- Enrollment1: Responsibility A
- Enrollment2: Responsibility C

Partner Business User:

- Enrollment1: Responsibility B
- Enrollment2: Responsibility D

Sample Sites Setup

Sample sites defined are Site 1, Reseller Site, and Site 2, Distributors Site. Each site supports two responsibilities. Neither site support guest users, and both sites are responsibility-restricted.

Site 1 - Resellers

This site does not allow guest user access and checks responsibility before allowing access to the site. It is identified with the following responsibilities:

- Responsibility A = Oracle iStore and Oracle Partner Management primary users

- Responsibility B = Oracle iStore and Oracle Partner Management business users

Site 2 -- Distributors

This site does not allow guest user access and checks responsibility before allowing access to the site. It is identified with the following responsibilities:

- Responsibility C = Oracle iStore and Oracle Partner Management primary users
- Responsibility D = Oracle iStore and Oracle Partner Management business users

Access Scenarios Related to Sample Enrollments and Groups

Use the sample user type/enrollment and sites setups in the following cases:

Case 1: Login/Register as Primary User

1. The partner primary user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the primary users (responsibilities A and C).
3. The partner drills down into Resellers Site. The Partner Home Page is displayed.
4. The Products tab displays the catalog. The partner can browse the catalog and place orders.
5. The Partner Home Page also displays a bin that shows all sites belonging to the Partner group, a bin that allows partners to enroll in new memberships, a bin that allows partners to navigate to opportunities, deals and referrals, and a bin that allows partners to upgrade renew programs.
6. The partner navigates to opportunities, then selects the Dashboard link to return to the portal.

Case 2: Login/Register as Business User

1. The partner business user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the primary users (responsibilities B and D).
3. The partner drills down into Distributors Site. The Partner Home Page is displayed.
4. The Products tab displays the catalog. The partner can browse the catalog and place orders.
5. The Partner Home Page also displays a bin that shows all sites belonging to the North America group, and a bin that allows partners to navigate to opportunities, deals and referrals.

6. The partner navigates to opportunities, then selects the Dashboard link to return to the portal.

The figure below shows how the Site Selection Page might look in a sample implementation. The example shows the page set up in multiple-column format. At the top of the page, the company (in this example graphic, the company is Vision Enterprises) logo displays. Under the logo, the language list appears. At the top of the central portion of the screen, the text, Select Your Site, directs users to choose a specialty site from within the two main groups presented: Resellers and Distributors. Language hyperlinks -- reading, for example, English and French -- display under the name of each specialty site. Users select the language link to access the Site Home Page for the specialty site.

Example Site Selection Page: Combined Store and Partner Sites



The figure below shows how the partner dashboard might look in a sample implementation. The example shows a web page set up in multiple-column format, with the navigation icons at the top right of the page above the site tabs: Home, Products, Library, Training. At the top left of the page, the company (in this example graphic, the company is Vision Enterprises) logo displays. At the top of the central portion of the screen, an image displays. Below this title, and some welcome text to the right of the image. Below that, the central portion of the screen displays the following sections: Product News and Hot Topics. Each of these sections contains hyperlinks to other web pages appropriate for partner users. Along the left portion of the screen, two bins display: Quick Links and Upgrades. The Quick Links bin displays the following hyperlinks: Referrals, Deal Registrations, Special Pricing Requests, Fund Requests; (under Opportunities heading) View All, Opportunity Bins, Opportunity Reports; (under Support heading) Service Requests, Knowledge Base; and (under Message Center heading) Approvals and FYI. Below the Quick Links bin is a bin named Upgrades. It includes two hyperlinks, Reseller UK and Technology Reseller; next to each hyperlink is a button called Upgrade. Along the right side of the screen, three bins display: New Offered Opportunities, Available Programs, and Renewals. The New Offered Opportunities bin displays two hyperlinks: Network Printers and Desktop Replacement for HQ; next to each hyperlink is a button called Accept. The Available Programs bin displays two hyperlinks: Reseller US and System Integrator; next to each

hyperlink is a button called Enroll. The Renewals bin displays two hyperlinks: Reseller UK and Technology Reseller, along with the button, Renew.

Example Partner Dashboard for Partner Primary User

Sample Scenario 2 - Partner Sites and Multiple Partner Sites

In this sample scenario, multiple partner sites are enabled with partner sites.

Sample User Type/Enrollments Setup

For the scenarios below, the following is the user enrollment setup:

Partner Primary User:

- Enrollment 1: Partner Primary User

Partner Business User:

- Enrollment 1: Partner Business User

Pre-conditions: The partner primary user registers the partner organization. The primary user is assigned to the Partner Primary user responsibility. The primary user enrolls in a membership that grants him with the "Reseller Primary User" Responsibility, the "Distributor Primary User" responsibility and the sites responsibilities.

Sample Groups and Sites Setup

In this scenario, two groups are set up, each with two sites.

Group 1 - Partners

- Site 1 -- Resellers: In this site, no guest user access is allowed. The following responsibilities are associated with the site:
 - Responsibility A = Reseller Primary User
 - Responsibility B = Reseller Non-primary user
- Site 2 -- Distributors: In this site, no guest user access is allowed. The following responsibilities are associated with the site:
 - Responsibility C = Distributor Primary User
 - Responsibility D = Distributor Non-primary user

Group 2 - Stores

- Site 3 -- USA Store: In this site, no guest user access is allowed. The following responsibility are associated with the site:
 - Responsibility = Vision Computers Indirect USA
- Site 4 -- Canada Store: In this site, no guest user access is allowed. The following responsibility are associated with the site:
 - Responsibility = Vision Computers Indirect Canada

Access Scenarios Related to Sample Enrollments and Groups

Use the sample user type/enrollment and sites setups in the following cases:

Case 1: Login/Register as Primary User

1. The partner primary user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the primary users (responsibilities A and C).
3. The partner drills down into Resellers Site. The Partner Home Page is displayed.
4. The Partner Home Page also displays a bin that shows all accessible sites belonging to the Stores group, including the targeted sites assigned to this partner through memberships, a bin that allows the partner to enroll in new memberships, a bin that allows the partner to navigate to opportunities, deals and referrals, and a bin that allows the partner to upgrade renew programs.
5. The partner navigates to opportunities, then selects the Dashboard link to go back to the portal.
6. The partner navigates to the targeted sites, places orders.

7. The partner selects the Site Selection Page, selects the Partner Group and navigates back to the partner dashboard. As an alternative -- if the merchant has mapped the partner bin to the target Site Home Page -- the user can navigate back to the partner site through the partner group bin.

Case 2: Login/Register as Business User

1. The partner business user accesses the login/registration page.
2. At registration/login completion, the Site Selection Page displays all partner sites that are accessible to the business users (responsibilities B and D).
3. The partner drills down into Resellers Site. The Partner Home Page is displayed.
4. The Partner Home Page also displays a bin that shows all sites belonging to the Partners group and the sites belonging to the Stores group, including the targeted sites assigned to this partner through memberships.
5. The partner navigates to opportunities, then selects Dashboard to go back to the portal.
6. The partner navigates to the targeted sites, places orders.
7. The partner selects the Partner site link in the Group sites bin to go back to the partner Dashboard.

Integrating Oracle iStore with Oracle Quoting

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Quoting Chapter
- Overview of Oracle Quoting
- Setting up Oracle Quoting
- Oracle iStore-Oracle Quoting Integration Overview
- Quote Publishing

Overview of Integrating Oracle iStore with Oracle Quoting Chapter

This chapter describes the integration of Oracle iStore with Oracle Quoting.

Overview of Oracle Quoting

Oracle Quoting enables simple, secure creation and management of customer quotes across all sales and interaction channels. Organizations can propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle.

Users can create quotes using modifiable templates, add and configure complex products, and perform real-time global availability checks. Users can accept product trade-ins, assign sales credits, and manually adjust prices. Quoting integration with Oracle Sales Contracts allows users to negotiate a quote with a sales contract.

Oracle Quoting is available with an HTML and a Forms user interface. Oracle Quoting-HTML is integrated with Oracle Sales and Oracle Quoting-Forms with Oracle TeleSales.

Setting up Oracle Quoting

Set up Oracle Quoting according to the latest version of the *Oracle Quoting Implementation Guide*.

Note: Oracle iStore uses Oracle Order Capture APIs to integrate with Oracle Order Management and Oracle Receivables. See the *Oracle Order Capture API Guide* for complete details.

Oracle iStore-Oracle Quoting Integration Overview

You can integrate Oracle iStore with Oracle Quoting to allow:

- **Sales Assistance:** See the chapter, *Implementing Customer Assistance*, page 15-1.
- **Terms and Conditions:** See the chapter, *Integrating Oracle iStore with Oracle Sales Contracts*, page 30-1.
- **Published Quotes:** See the "Quote Publishing" section, below.
- **Quote Sharing:** See the chapter, *Implementing Carts and Orders*, page 13-1.

Quote Publishing

Sales representatives can create quotes in Oracle Quoting and publish them to Oracle iStore specialty sites. Oracle iStore customers can then view, alter (if this functionality is enabled), and place the quotes as orders.

Note: There are two columns in the Quotes page (accessible through the Cart global icon) that display important information for the user:

- **Updateable:** In order for this column to display, the profile option, IBE: Allow Update for Draft Quotes, must be Yes (see the section, "Allowing Customers to Update Published Quotes", below). Whether this column displays a Yes or No value depends upon the quote status and the user role. If this column displays a Yes value, it means the quote is in an updateable status (i.e., Draft status).
- **Orderable:** If this column displays Yes, it means that quote is in a status that allows to the user to place the quote as an order -- i.e., there must be an available quote status transition from the current quote status to Order Submitted.

In both cases, the value of the columns is based on the status of the cart/quote and the permissions of the user (his role on the quote as well as which permission he has).

Conditions for Publishing a Quote

To publish a quote all of the following conditions must be met:

- Quotes can be published to any specialty site. However, the user to whom the quote is published must be able to access the specialty site where the quote is published.
- The quote is in a status that allows updating by the sales representative.
- The quote to be published is in the highest version.
- The quote is not in Ordered or Inactive status. In order for a customer to view the quote, the quote must be in Published status.
- The quote is not expired.
- The quote has a quote name.
- A specialty site exists to which the quote can be published and the iStore user who will view the quote has the appropriate responsibility to access the site.
- Only customers who are registered (and thus in the FND_USER table) can view published quotes in Oracle iStore. If the customer is an individual (B2C) user, the quote is published to the customer. If the customer is an organization (B2B user), the quote is published to the customer contact. There must be a customer contact for an organization, or the quote cannot be published.
- If the customer or customer contact is not an FND_USER, the required username field on the Oracle Quoting Publish page will be blank. The username input by the sales representative and the system generated password are e-mailed to the customer or customer contact by the Quoting application.
- The payment type and shipping method must be valid for the site where the quote is being published. See the section, "API-Level Validation of Site Settings", below.

Note: If any of these conditions are missing, the quote will not be visible to the customer, although the published flag in Quoting will indicate publication. See the Oracle Quoting documentation for more information.

API-Level Validation of Site Settings

Before a sales representative is allowed to complete the publishing of a quote to a specialty site, Oracle Quoting calls an Oracle iStore API which validates whether the following is enabled in the site where the quote is being published:

- **Shipping Method:** The quote's shipping method must be valid for the target site.

- **Payment Type:** The quote's payment method must be valid for the target site.
- **Payment Threshold:** If Payment Threshold functionality has been enabled, the API checks to be sure that the site contains payment-threshold-allowed payment types (unless the sold-to contact is excluded from the threshold restriction via the permission).

An error message will be returned and the quote will not be published if invalid parameters are found.

Web Published Quotes Business Flow

The following is the business flow for Oracle iStore Web-published quotes:

1. Sales representative uses Oracle Quoting to Web Publish a quote.
When requesting publication, the sales representative can select from the known e-mail addresses for the customer or contact, and can enter a new customer e-mail if necessary.
2. An Oracle Quoting workflow event sends the customer an e-mail with a direct link to the quote details.
3. In Oracle iStore, the user accesses the quote in the Cart > My Quotes subtab. The customer can also view the quote by using the View Quotes link in Welcome Bin.
4. At any time, the sales representative can make changes to the quote that are visible to the user --- but only as long as the quote is not ordered. If the quote has been approved, the sales representative cannot change anything on the quote -- the quote is read only. The sales representative can unpublish the quote at any time.
5. User reviews the quote. He can check out with the quote only if the quote status allows it. The quote remains accessible to the customer only as long as the quote remains in Publish status.
 - Users also can share quotes, if this functionality is enabled. See chapter, Implementing Carts and Orders, page 13-1, for more details.
6. From the Review Order Details and Confirm page, the user can:
 - Make payment type modifications.
 - Request sales assistance --- See the chapter, Implementing Customer Assistance, page 15-1, for more information on the Sales Assistance process.
 - Place the quote as an order. Note that B2B users must have the IBE_CHECKOUT permission to view the Checkout button, and the IBE_CREATE_ORDER permission to view the Place Order button.

- Review or reject Terms and Conditions (if implemented). Note that if a sales representative publishes a quote to Oracle iStore with no T&Cs attached, and the customer places an order with the quote, the default contract associated with the site will be attached to the sales order (assuming that there is a default contract associated with the site).
7. For other than payment type changes, the customer must contact the sales representative to modify the web published version of the quote. This can be done using the Request Sales Assistance functionality.
 - **Exception:** If your implementation allows customers to update quotes, then the customer will be able to modify the published quote.
 8. From Oracle Quoting, sales representatives can edit, re-publish, un-publish, and inactivate quotes.
 9. Sales representatives can also view Oracle iStore carts that have been converted to quotes in Oracle Quoting when customers request sales assistance.
 10. Note that when the customer places an order with a published quote the T&Cs attached to the quote get passed to Oracle Order Management.

See the chapter, *Integrating Oracle iStore with Oracle Sales Contracts*, page 30-1, for details about T&Cs functionality.

Setting Web Publish Profile Options

The following profile options impact the Oracle iStore-Oracle Quoting integration.

1. **IBE: iStore Non Secure URL:** This profile option must be set to enable Web Publishing functionality. It specifies the base URL for the non-secure server (HTTP).
2. **IBE: Use Quote Publishing:** Enables customer access to quotes from two areas in the Customer UI:
 - Enables the View Quotes link in the Welcome Bin on sites' home pages.
 - Enables the Quotes subtab within the Cart menu in the Customer Application.This profile option defaults to No if not set.
3. **ASO: Default Quote Status:** Set this to `Store Draft` at iStore application level.
4. **ASO: Enable Web Publishing:** If set to Yes, quotes can be published to Oracle iStore specialty sites. Note that this should be at the site level or the Oracle Quoting application level.

See the appendix, *Profile Options*, page A-1, for more information on the iStore profile

options. See the *Oracle Quoting Implementation Guide* for descriptions and explanations of all Oracle Quoting profile options.

Allowing Customers to Update Published Quotes

By default, customers are only able to update payment information on a quote published in the Customer Application. To allow site customers to perform most of the normal cart actions with a quote, set the profile option, IBE: Allow Update for Draft Quotes, to Yes at the site level. See the appendix, Profile Options, page A-1, for more information.

Note: Be sure to bounce the server after making site-level profile changes.

See also: "Update Quote Process Flow" in the chapter, Customer Application Process Flows, page 37-1

Update Quote Rules and Guidelines

Keep the following guidelines in mind for published quote functionality:

- Only Web published quotes in Draft status are candidates for this functionality.
- Customers will be allowed to update a published quote until the sales representative moves the quote into a state other than Draft.
- After the Allow Update for Draft Quotes profile is set to Yes, a new column, entitled "Updateable", appears in the Quotes page. This column's value will be either Yes or No, signifying whether the quote is updateable by the customer in its current state. A quote also must be in Draft status for the Updateable column to display a Yes value.
- When a user updates a quote, the Shopping Cart page is retrieved; the quote then functions as a shopping cart, and the user can perform all of the usual functions with the cart. He cannot, however, delete the quote.
- If Approvals are being used in Quoting: Once the quote has been submitted for approval, the customer must wait until the quote is approved to place the order. After the quote is approved, the web customer can only modify the payment information before placing the order. However, customers can also request sales assistance again. If the sales representative rejects the request, the quote remains in approved status and the customer can still place the order. In this case, the customer should be notified by the sales representative offline. If the sales representative accepts the request, the sales representative will need to place the quote back in Draft status to enable the update by the customer.
- When asynchronous pricing is enabled: When the profile option, ASO: Enable Batch Processing, is set to Yes, quotes cannot be updated on a specialty site (even though the quote status is an updateable status, Draft).

In this case, an error message is returned by Quoting: *The previously submitted pricing request has not completed. You may not update the quote until the pricing request has completed or is canceled.*

The quote needs to be in a status different than Draft status while the sales representative updates the quote and the batch process (that returns the price) is over.

To accommodate this conflict, the sales representative needs to place the cart/quote into a status that is read-only for customer while he/she updates the quote. After updating it, the representative can then place the quote back into Draft mode to allow the customer update.

Integrating Oracle iStore with Oracle Sales Applications

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Sales Applications Chapter
- Oracle Sales Product Suite Overview
- Oracle iStore Lead Import Functionality Overview
- Oracle iStore Lead Import Process Flow
- Setting up Oracle iStore to Generate Leads
- Setting up Oracle Sales Applications for Lead Import
- Running the Leads Concurrent Programs

Overview of Integrating Oracle iStore with Oracle Sales Applications Chapter

This chapter details sales Lead Import implementation in Oracle iStore, and contains information on the integration of Oracle iStore with Oracle Sales applications, such as Oracle Sales and Oracle TeleSales.

Oracle Sales Product Suite Overview

Oracle Sales is a family of integrated applications designed to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and specialty sites to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

To learn more about the Oracle Sales family of applications, see the Oracle Sales

documentation.

Oracle iStore Lead Import Functionality Overview

The Lead Import functionality in Oracle iStore can be a valuable marketing tool to help you sell, cross-sell, and up-sell products, as well as track the specialty site behavior of customers and potential customers. Leads are generated for a specific time frame using the iStore Lead Import Concurrent Program Request Set, which pulls customer data (such as name, address, phone numbers, etc.) from:

- Submitted Oracle iStore orders
- Active shopping carts that have expired in an Oracle iStore specialty site -- so called "abandoned" carts
- Saved shopping carts that have expired in an Oracle iStore specialty site

The concurrent program set populates the lead import data into tables utilized by Oracle Sales and Oracle TeleSales. Oracle Sales and Oracle TeleSales users then run the Import Sales Leads concurrent program to complete the data-load process.

For more information on Oracle Sales and Oracle TeleSales, see the *Oracle Sales Implementation Guide*.

Oracle iStore Lead Import Benefits

Oracle iStore's Lead Import functionality can provide the following benefits:

- Oracle iStore orders and expired cart data can be imported into Oracle Sales and Oracle TeleSales as leads. Sales representatives can access the information in these applications after running the Sales Lead Import Program
- Contact information and browsing or purchasing habits can be easily captured for customers and potential customers.
- Lead information retrieved includes names, addresses, phone numbers, and e-mail addresses (if available in the customer registration), as well as browsing or purchasing behavior (available through order or cart analysis).
- Customer information collected can be reused for tracking or marketing purposes.
- Sales representatives can make follow-up contact with users who have left carts in specialty sites.
- The lead import concurrent program set allows party exclusion. For example, you can exclude data from your company's internal orders or specific organizations, simply by entering the party number(s) in the Enter Parameters screen of the concurrent program.

- Specific Oracle E-Business Suite roles or combinations of roles can be excluded from the data capture. For example, you may wish to exclude orders placed by users having the iStore Reseller role or certain B2B user roles. Roles used in Oracle E-Business Suite can be found in each product's administration documentation. Information about Oracle iStore roles can be found in the chapter, *Implementing User Management*, page 14-1, and the appendix, *Seeded User Data*, page B-1.

Oracle iStore Lead Import Process Flow

The following is the process flow for Oracle iStore lead import functionality.

1. Oracle iStore Lead Import Concurrent Program Request Set pulls customer data from Oracle iStore orders (via Oracle Order Management tables). The same concurrent program set pulls data from expired (saved and active) carts.
 - When pulling order data, all orders -- except those placed by sales representatives -- are pulled from the Order Management tables. The order status is not considered by the concurrent program.
 - Orders placed by sales representatives are not considered for inclusion in the data, since these leads have already been reviewed from a marketing perspective. Quotes published to specialty sites by sales representatives are not included in lead imports, since these are already identified as opportunities.
 - The concurrent program pulls only data from expired carts (active or saved) created by registered users. No unexpired active or saved carts are considered.
 - Two profile options control the number of days that must pass without activity before a cart is considered expired:
 - IBE: Active Cart Expiration Duration (# days)
 - IBE: Saved Cart Expiration Duration (# days)

See the appendix, *Profile Options*, page A-1, for more information on these profile options.

 - If multiple addresses exist for a customer, the concurrent program selects the first party site address from the list of primary addresses.
 - Only data from registered users is considered.
2. Oracle iStore Lead Import concurrent program set pushes data into Oracle Sales data tables using Oracle Sales APIs.
 - The following Oracle Sales database tables are populated in this process:

- AS_IMPORT_INTERFACE: Contains cart-level information
 - AS_IMP_LINES_INTERFACE: Contains item-level information
3. Sales representatives in Oracle Sales Online or Oracle TeleSales run the Sales Lead Import Program, after which they can access the leads and market to them, turning them into opportunities.
 - Leads imported through Oracle iStore have the lead names: iStore Cart Lead and iStore Order Lead, making them easy to distinguish from non-iStore leads.
 - In the AS_IMPORT_INTERFACE table, the SOURCE_SYSTEM column shows STORE if the lead is sourced from Oracle iStore. The Oracle iStore cart number and Site ID are stored, respectively, in the SOURCE_PRIMARY_REFERENCE and SOURCE_SECONDARY_REFERENCE columns.
 - Sales representatives can query the leads in OSO and OT using the mandatory Source Code (also called Promotion Code) used when running the concurrent program.

Note: If an imported cart line already has a source code associated with it (for example, because it was generated through its visibility on an external website), then the iStore lead import program will *not* overwrite the original source code.
 4. Sales representatives use Oracle Quoting to change opportunities into quotes.
 5. Sales representatives can directly create orders from quotes, or they can Web Publish quotes to Oracle iStore, where the customers can then place the orders. See the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more details on quote publishing.

Setting up Oracle iStore to Generate Leads

The following steps must be performed for Oracle iStore to create the leads:

- Set profile options
- Ensure user setup
- Run Lead Import Concurrent Program Request Set

Setting iStore Lead Import Profile Options

Set the following profile options at the site or application level for Oracle iStore:

- **IBE: Order Lead Import Interval (In Days)** and **IBE: Quote Lead Import Interval**

(In Days): The values of these two profile options (one for orders and one for expired carts) are used to determine the number of days between retrieval of lead data. If no value is set, these default to 1.

- **Important:** If you are running the iStore Lead Import concurrent program on a schedule (as is recommended), then set these two profile options to values that exactly match the number of days of the concurrent program schedule. For example, if the concurrent program is set to run every seven days, then set the value of each of these two profile options to 7. This synchronization is important because if the profile options are set to values that do not match the schedule, then the profile options may inappropriately impact the collection data.

See the section, "Best Practice for iStore Lead Import Concurrent Program Set", below, for more details.

- **IBE: Email Address For Lead Import Status:** In this profile option, you specify the e-mail address(es) where the lead import program status notification will be sent. Use the following format:

`john.doe@company.com`

Or if entering more than one e-mail address, separate them with single space, a single comma, or a single comma and then a space, as in the following examples:

- `john.doe@company.com<space>john.doe@company.com`
- `john.doe@company.com, <space>john.doe@company.com`
- `john.doe@company.com, john.doe@company.com`

There is no default value for this profile.

Note: If you leave this profile option blank, then no e-mail is sent.

Ensure User Setups for iStore Lead Import Concurrent Program Set

Following are the high-level steps which must be followed in order for the user to whom you grant the iStore Concurrent Program Responsibility to run the iStore Lead Import concurrent program set. Refer to the documentation listed in the section below for detailed instructions.

Steps

1. Create an employee in Oracle Human Resources Management System (HRMS).
 - Make sure that you enter Employee in the Category field.
 - Make sure you create a username for the employee.
 - See *Using Oracle HRMS - The Fundamentals* or *Managing People Using Oracle*

HRMS for instructions.

2. Enable the user as a resource in Oracle CRM Resource Manager.
See the *Oracle Trading Community Architecture Administration Guide* for instructions on importing resources.
3. Grant iStore Concurrent Program Responsibility to the user.
 - For instructions, see the chapter, Implementation Tasks for Oracle iStore, page 4-1.

Setting up Oracle Sales Applications for Lead Import

The following steps must be performed for Oracle Sales to capture the leads:

- Ensure user setup
- Set profile options
- Run concurrent program

Note: This section contains limited information on how to prepare for and run the concurrent program, Sales Lead Import. For complete instructions, please refer to the latest *Oracle Sales Implementation Guide*.

User Requirements for Running Sales Lead Import Program

Proper setup of users is essential for successful use of the concurrent program.

1. Ensure that the user belongs to a Sales Group.
2. Ensure that the user running the concurrent program has the Oracle Sales Administrator responsibility.

Refer to *Oracle Sales Implementation Guide* for additional information.

Oracle Sales Profile Options Required for iStore Lead Import

Set the following Oracle Sales family profile options at site or application levels.

For more information, see the Setting up Lead Management section of the *Oracle Sales Implementation Guide*.

- **OS: Assign New Lead:** This profile option is used by Oracle Sales when assigning resources (sales representatives) to the leads. Following are the impacts of setting this profile option:

- If set to No, no resource will be assigned to the lead and you must run Oracle CRM Foundation Territory Manager concurrent program Assign Territory Access to assign resources to the lead. See *Oracle Common Application Components Implementation Guide* for details on how to run this concurrent program.
- If set to Yes, at runtime the system attempts to auto-assign a resource for the lead in the following order:
 - An appropriate Territory Manager resource is attempted. If not found, then:
 - The value of OS: Default Sales Rep ID is used (see below). If this is null, then:
 - The lead is assigned to the user running the concurrent program, if he belongs to a sales group.
- If none of the above steps assigns a resource to the leads, then the result will be the same as if you set the profile option to No. Unless you run the concurrent program mentioned in the *If set to No* paragraph above, the leads will have no owner in the Sales applications, but you will still be able to retrieve them by searching for New leads in the Sales applications.

Caution: Setting this profile option to Yes can slow performance.

- **OS: Auto Qualify Lead:** This profile option turns automatic qualification for sales leads on or off. A setting of Yes causes the application to attempt to qualify a lead each time the lead is updated. A setting of No means the user must qualify the lead manually by selecting the Qualified checkbox in Oracle Sales Online. Defaults to No if not set. Set this profile option at site level.
- **OS: Default Decision Timeframe for Leads:** This profile option is used by the leads qualification process to set a default value in the UI and APIs. If not set, this profile inserts a null value in the database table. Defaults to `within 1 week` if not set.
- **OS: Default Lead Scorecard:** This required profile option is used by Oracle Sales to rank the sales lead. If not set, the scoring engine will not function. While creating leads, the UI retrieves this value and passes it to the scoring APIs.
- **OS: Default Vehicle Response Code for Leads:** This profile option is used by Oracle Sales to specify the default mode for contacting the customer. Default value is `User`. If not set, this profile inserts a null value in the database table.
- **OS: Default Channel for Leads:** This required profile option is used to specify the default channel in the UI and APIs. The default value is `Direct`. If not set, then the application inserts a null value and notifies the user of an error.

Note: All leads created from Oracle iStore are Direct leads in terms of channels in

Oracle Sales applications.

Refer to *Oracle Sales Implementation Guide* for additional information.

Running the Leads Concurrent Programs

After the required setups are performed, generating leads is a two-step process:

1. Run iStore Lead Import Concurrent Program Request Set -- See the sections, "Run iStore Lead Import Concurrent Program Set" and "iStore Lead Import Concurrent Program Enter Parameters Screen", below
2. Run Sales Lead Import Program -- See the section, "Run Sales Lead Import Concurrent Program", below

Run iStore Lead Import Concurrent Program Set

To generate the leads, run iStore Lead Import Set. This is a concurrent program set containing two concurrent programs discussed below.

Important: See the section, "Best Practice for iStore Lead Import Concurrent Program Set", in this chapter, for best practice information.

The concurrent program request set, iStore Lead Import Set, pulls data into the Oracle Sales database tables, where it can be used by Oracle Sales Online and Oracle TeleSales. The request set contains two concurrent programs:

- iStore Lead Import Quotes -- This program imports only expired *active* or *saved* shopping carts. The number of days before carts expire is controlled by the profile options: IBE: Active Cart Expiration Duration (# days) and IBE: Saved Cart Expiration Duration (# days).
- iStore Lead Import Orders --- This program imports only orders from Oracle iStore.

For more information:

- See the chapter, Concurrent Programs, page 35-1, for general instructions on how to run concurrent programs.
- Refer to the *Oracle E-Business Suite Setup Guide* for information on Oracle Applications concurrent programs.

Best Practice for iStore Lead Import Concurrent Program Set

This section contains best practice information for running iStore Lead Import Concurrent Program Set to generate leads into Oracle Sales Online and Oracle TeleSales. It is important that you read and understand the instructions in this section.

- For data entry instructions on the iStore Lead Import Parameters screen -- where

the lead import parameters are entered -- see the section, "iStore Lead Import Concurrent Program Enter Parameters Screen", in this chapter.

- Note that whether or not an end date is set when running the concurrent program set affects the running mode; the request set will run as follows:
 - COMPLETE mode when the end date is given
 - INCREMENTAL mode when the end date is not given

First Time Running the Concurrent Program Set

It is recommended that the first time you run this request set, you enter a Begin Date for the data collection. Enter an End Date if desired, but the End Date will default to system date if not entered manually.

Subsequent Running of the Concurrent Program Set

After you have run the request set for the first time, it is strongly recommended that you:

- Set the concurrent program set to run on a schedule, such as every week, bi-weekly, or every month.
- Set the following profile options to exactly match the number of days in the concurrent program set schedule:
 - IBE: Order Lead Import Interval (In Days)
 - IBE: Quote Lead Import Interval (In Days)

Note: If the interval profile options shown above are set to a fewer number of days than the concurrent program set schedule, then the interval profile options will capture data incorrectly. See the following example:

Example: If the concurrent program set is scheduled to run every 30 days and the interval profile options are each set to 10, then the concurrent program set will still run every 30 days -- but lead data will be captured only for 10 days.

When the concurrent program is run the second time, the End Date of iStore Lead Import Orders is Begin Date plus value of the profile IBE: Order Lead Import Interval. And for iStore Lead Import Quotes the End Date for the next run is Begin Date plus value of the profile IBE: Quote Lead Import Interval.

The graphic below shows how Begin Date and End Date are derived, if the concurrent program set is run on a schedule.

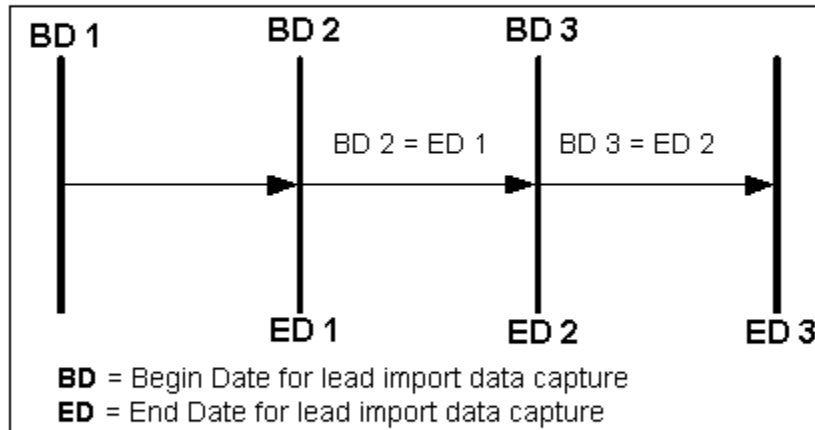
How Lead Import Begin and End Dates are Determined

First time, manually run the concurrent program set:

Enter a **Begin Date** Enter an **End Date** if desired, but **End Date** will default to system date (today's date) if not set.

After the first time, run request set on schedule:

Begin Date will automatically be the last **End Date**.



Set the following profile options to match days of concurrent program schedule:

- IBE: Order Lead Import Interval (In Days)
- IBE: Quote Lead Import Interval (In Days)

Example: iStore Lead Import Begin and End Dates on 7-Day Schedule

This example shows sample begin and end dates if the concurrent program set is run on an every-7-days schedule and the interval profile options are set to 7.

Note: End Date defaults to system date if not entered manually.

First time: Enter Begin Date manually.

Example Begin Date: 01-APR-2002 08:30:00 (April 1, 2002, 8:30 a.m.)

Example End Date: 01-MAY-2002 08:30:00 (May 1, 2002, 8:30 a.m.)

After running for the first time, set the concurrent program to run on a schedule.

For example:

Schedule the concurrent program set to run every 7 days and set IBE: Order Lead Import Interval and IBE: Quote Lead Import Interval to 7.

The concurrent program scheduler will select its Begin Date as last End Date that the program was run.

Note: To avoid overlaps or missed data, the system uses mathematical logic to stop the lead import batch process one millisecond before the actual End Date. Then it uses the

actual End Date for the Begin Date of the next batch. See examples below.

1st scheduled running:

Begin Date = 01-MAY-2002 08:30:00

End Date = 08-MAY-2002 08:29:99

2nd scheduled running:

Begin Date = 08-MAY-2002 08:30:00

End Date = 15-MAY-2002 08:29:99

3rd scheduled running:

Begin Date = 15-MAY-2002 08:30:00

End Date = 22-MAY-2002 08:29:99

4th scheduled running:

Begin Date = 22-MAY-2002 08:30:00

End Date = 29-MAY-2002 08:29:99

iStore Lead Import Concurrent Program Enter Parameters Screen

The graphic below, iStore Lead Import Concurrent Program Enter Parameters Screen, shows the Parameters form used in running the program. The fields in the screen are described below the graphic.

iStore Lead Import Concurrent Program Enter Parameters Screen

Begin Date	<input type="text"/>
End Date	<input type="text" value="21-MAY-2002 10:5:43"/>
Debug Flag	<input type="text" value="No"/>
Purge Flag	<input type="text" value="No"/>
Write Detail Log	<input type="text" value="No"/>
Prevent Leads From Party Number(s)	<input type="text"/>
Source Code For Order Leads	<input type="text"/>
Exclude Users with following Role(s)	<input type="text"/>

OK Cancel Clear Help

Begin Date and End Date Fields

The first time you run the concurrent program set, be sure to run the programs manually by entering Begin and End Dates in the Parameters screen. When entering dates, use the format DD-MON-YYYY. For example, April 1, 2002 would be entered as 01-APR-2002. You can also enter hours and minutes, in the format HH:MM:SS. For example, 8:30 a.m. would be entered: 08:30:00.

Note: The End Date defaults on system date (today's date) if not set. After the first time run, the Begin Date defaults to the second after the last End Date completed.

Note that the request set will run in COMPLETE mode when the end date is entered, but will run in INCREMENTAL mode when the end date is not entered.

After you have run the concurrent program for the first time, it is recommended that you schedule the remaining lead import jobs, setting the interval profile options (IBE: Order Lead Import Interval and IBE: Quote Lead Import Interval) to the same number of days as the concurrent program set schedule.

Exclusion of Party Numbers Field

You can exclude specific parties from the lead data by entering the Party Number. The party number is an exposed field in Oracle customer modules, or it can be obtained from the HZ_PARTIES table, PARTY_NUMBER column. This is not to be confused with party_id which is an internal unique key on HZ_PARTIES. When entering party numbers, separate multiple parties by commas.

Source Code for <Order/Quote> Leads Field

You must identify sets of leads by promotion code in the Source Code for Order/Quote Leads field. This field maps to Source Code in the Oracle Sales applications, and originates in AMS_SOURCE_CODES_VIEW table. In the iStore Lead Import Quotes concurrent program, you will specify a source code for carts, while in the iStore Lead Import Orders concurrent program, you specify a source code for orders. This source code tagging ensures consistency in marketing campaign source code tracking. For example, you can set one promotion code to mark the carts leads and another to mark the order leads. The source code is validated against AMS_SOURCE_CODES_VIEW, and only one code can be used per program submission.

In Oracle Sales Online and Oracle TeleSales, sales representatives can query by source code (also called promotion code).

Exclude Users with Following Roles Field

You can exclude the capturing of user data from users with specific user roles by entering the role names separated by commas. For example, you may wish to exclude sales representative roles, iStore reseller roles, or other specific Oracle application roles. Role names can be obtained in documentation of the specific application carrying the role, and you can view a list of user roles in the Oracle CRM System Administrator Console. See the "Implementing User Management" chapter.

Logging Options Fields

The following fields enable various logging options. Enter either Yes or No in these fields. All three default to No if not set. Remember, setting the logging options to Yes may increase the time it takes to run the concurrent programs.

- **Debug Flag:** Yes enables concurrent manager logging; log results can be viewed in the concurrent manager log file.

- **Purge:** Yes enables two activities:
 - The main log table (IBE_LEAD_IMPORT_LOG) is populated with the number of carts or orders input to the Sales Lead Import Program.
 - The log details table is purged each time the program is run. The name of the table is: IBE_LEAD_IMPORT_DETAILS.
- **Write Detail Log:** Yes enables the writing of details to the log details table (IBE_LEAD_IMPORT_DETAILS) for every lead that is created. To see the details in the log details table, you must perform an SQL query on the table.

Run Sales Lead Import Concurrent Program

To import the leads into Oracle Sales Applications, run the Import Sales Leads concurrent program. This program creates leads from the data in the interface tables.

Sales Lead Import Concurrent Program Enter Parameters Screen

Following are the input parameters:

- **Lead Source System:** Set to NEW for importing iStore leads; mandatory field.
- **Show Debug Message:** Default is No.
- **Batch ID:** Optional field.
- **Purge Error Message:** Default is No.

Note that the status of the leads in the interface tables (AS_IMPORT_INTERFACE and AS_IMP_LINES_INTERFACE) should be set to SUCCESS.

Refer to the *Oracle Sales Implementation Guide* for additional information.

Output of Sales Lead Import Concurrent Program

Errors are logged into AS_LEAD_IMPORT_ERRORS.

Refer to the *Oracle Sales Implementation Guide* for additional information.

Note: For information about the performance impact of bulk load events, refer to the section, "Setting Up Business Events", in the *Oracle Trading Community Architecture Administration Guide*.

Integrating Oracle iStore with Oracle Sales Contracts

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Sales Contracts Chapter
- Overview of Oracle Sales Contracts
- Terms and Conditions

Overview of Integrating Oracle iStore with Oracle Sales Contracts Chapter

This chapter describes the integration of Oracle iStore with Oracle Sales Contracts to provide Terms and Conditions (T&Cs) functionality in the Customer Application.

Overview of Oracle Sales Contracts

Oracle Sales Contracts, through its integration with Oracle Order Management, allows sales representatives and others involved in the sales cycle to create short- or long-term customer contracts, including terms and conditions (T&Cs), for use in Web-based stores, Oracle Quoting, and other Oracle E-Business Suite applications. The functionality leverages integration into Oracle's contract management system, and includes formal negotiation, complete with internal approval and customer acceptance processes. Oracle Sales Contracts users not only benefit from the fundamental capabilities required for sales negotiation, but from the additional contractual capabilities, such as T&Cs, price holds, and the capability to enforce the agreed upon-terms for future customer purchases. See the Oracle Order Management implementation and user documentation for more information.

Setting up Oracle Sales Contracts

Set up Oracle Sales Contracts according to the latest version of the *Oracle Order Management Implementation Manual*.

Note: To use the Terms and Conditions functionality, you must integrate with Oracle Quoting. See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, for more information.

Terms and Conditions

Merchants can make it mandatory that terms and conditions (T&Cs) get attached to an order during checkout in Oracle iStore's Customer Application. In the Checkout: Review Terms and Conditions page, implementers can give customers the option to view T&Cs in HTML format, and then let them accept or reject the terms of the order. The T&Cs are contracts set up through Oracle Sales Contracts module. Each of your customer responsibilities can be tied to a different standard contract. In Oracle Quoting, sales representatives can alter the standard contract and then publish the cart/quote back to the customer for review.

In addition, the Contract Expert feature of Oracle Sales Contracts provides the ability to dynamically add additional pre-approved clauses to a contract, based on attributes of an Oracle iStore shopping cart or quote.

Terms and Conditions Process Flow

The T&Cs process flow (also known as the contract negotiations process flow) is initiated when a customer disagrees to the T&Cs on an order. The following is the high-level process flow for T&Cs:

1. A customer creates a shopping cart, or retrieves a published quote, and proceeds through the checkout pages, arriving at the Checkout: Terms and Conditions page.
2. The Checkout: Terms and Conditions page displays just before the Checkout: Review and Place Order page, which is the final page in the checkout flow. For the actions that a customer can perform in this page, see the section, "Terms and Conditions Page", in the chapter, *Implementing Carts and Orders*, page 13-1. The T&Cs are presented in HTML format, with system variables -- such as customer and order information -- resolved into the T&Cs through APIs. In this scenario, the T&Cs attached to the order are the standard contract specified by the Oracle Quoting parameter, Default Contract Template.
3. If the customer accepts the standard T&Cs, the order proceeds as normal. The T&Cs are attached to the sales order when the order is placed in Oracle Order Management.
4. To reject the T&Cs, the customer selects the I Disagree button in the Checkout: Terms and Conditions page. This action initiates the Sales Assistance flow -- see the section, "Sales Assistance Process Flow" in the chapter, *Implementing Customer Assistance*, page 15-1. The only difference between this flow and the Sales Assistance flow is that the e-mails sent in this flow are related to Contract Negotiations instead of Sales Assistance. See the chapter, *Integrating Oracle iStore*

with Oracle Workflow, page 34-1, for more information about the Contract Negotiations e-mail notifications.

5. In a typical Contract Negotiations flow, the sales representative would launch the Contracts authoring tool via Oracle Quoting to change the T&Cs attached to the order. Once an order is placed with the quote, the T&Cs attached to the quote get passed along to Oracle Order Management with the sales order. See the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information on quote publishing. In addition, any contract documents that the sales representative has attached to the quote also are submitted with the order. Note that the customer will not be able to view contract documents attached to the order.

Express Checkout with Terms and Conditions

When customers submit orders for Express Checkout, they can preview the standard T&Cs associated with the shopping cart where they placed the items into their express checkout queue. If the customer doesn't agree with the T&Cs, they should cancel the express checkout order. See the chapter, Implementing Carts and Orders, page 13-1, for more information about Express Checkout.

Implementing Terms and Conditions

In addition to setting up the contract authoring tool (and any other related setups), the following steps are required to set up the T&Cs functionality for use with Oracle iStore.

Note: The system maintains reference to the T&C standard contract at the quote header level.

Implement Oracle CRM Application Foundation Notes Module

Comments associated with a T&Cs rejection scenario are stored in Oracle CRM (JTA) Notes; therefore, this module is a required dependency for the T&Cs functionality. See the *Oracle Trading Community Architecture Administration Guide* for information on how to set up the Notes module.

Set Profile Options

Set the following profile options:

- Set OKC: Enable Sales Contracts to Yes.
- Set OKC: HTML Layout Template to Contract Terms Layout Template for iStore.
- Set IBE: Enforce Terms and Conditions Review by User to Yes.
- Set IBE: Use Sales Assistance Feature to Yes.

- Set the Oracle Quoting parameter, Default Contract Template, to the default template for Oracle Quoting. See the "Oracle Quoting Integration Parameters" section in the appendix, Profile Options, page A-1, for more information.

Refer to the appendix, Profile Options, page A-1, for more information on settings of these profile options.

Set up Contract Template Document Type

For Oracle iStore T&Cs to function properly, ensure that the contract template document is enabled for the document types, Sales Order and Quote.

Contract Expert

The Contract Expert feature of Oracle Contracts provides the ability to dynamically add additional pre-approved clauses to the T&Cs, based on attributes of a cart. This allows contract departments to minimize the number of standard clauses contained in a contract – the standard clauses appearing in the contract are only those that apply to the specific order. For example, rather than showing all clauses for database, applications server, and application when the customer is only buying database products, Expert would provide only the terms related to the database products and could be displayed in addition to any other standard terms.

How Contract Expert Works

Implementers set up a Contract Expert-enabled contract and set it as the default contract for Oracle iStore T&Cs. In the Customer Application, as a customer proceeds to review the T&Cs, Contract Expert runs in the background, and, using APIs, gathers attributes of the shopping cart and sends pre-defined contract clauses back to the terms and conditions page based on the cart attributes. If a customer requests help or disagrees with the T&Cs, the cart or quote is retrieved by the sales representative in Oracle Quoting. The sales representative initiates Contract Expert during the quote update process in order to pull in any additionally needed clauses. The sales representative then publishes the quote back to the customer. Other than the display of clauses in the Checkout: Terms and Conditions page, there is no user interface change with this functionality on the part of Oracle iStore.

Also note the following:

- If an error exists when Contract Expert is run in the Oracle iStore flow (such as an invalid configuration), the user will see an error message, and the checkout flow terminates.
- When the system runs Contract Expert, the contract clauses available get persistently associated with that shopping cart. For example, if a cart was created in a given site (for example, Site 1) but was checked out with in another site (for example, Site 2) the Contract Expert clauses will be based on those associated with the cart from Site 1. This behavior is due to the fact that Contract Expert retains the

original Site ID stored at the cart (quote) header level.

Express Checkout with Contract Expert

When a customer places an Express Checkout order with Contract Expert enabled, following is the behavior:

- T&Cs are instantiated when a Contracts Expert-enabled template is used and the user views the T&Cs in the Pending Express Checkout Orders page. The T&Cs are not saved in the system at this point.
- When the Oracle iStore concurrent manager program runs to convert express checkout orders into sales orders, Contract Expert runs again to generate T&Cs. This time, the T&Cs are attached to the order.

Cart Attributes Supported for Contract Expert

Following are the cart attributes supported for Contract Expert:

- Site (cart-level)
- Ship Priority (cart-level)
- Item
- Item Category

Implementing Contract Expert

Following are the steps to set up Contract Expert for Oracle iStore. For additional setups not covered here, see the *Oracle Contracts Implementation and Administration Guide*, the *Oracle Sales Contracts Implementation Guide* and the *Oracle Quoting User Guide*.

1. In Oracle Contracts, set up a contract with the proper layout and numbered sections for Oracle iStore.
2. Ensure that the contract has its Contract Expert flag enabled.
3. Set the profile option, OKC: Use Contract Expert, to Yes at site level. This profile option determines whether Contract Expert can be used by an organization in the Oracle E-Business Suite. If set to No, Contract Expert is not enabled in Oracle Contracts.
4. Set the contract as the default contract template for Oracle iStore, using the Oracle Quoting parameter, Default Contract Template. See the "Oracle Quoting Integration Parameters" topic in the appendix, Profile Options, page A-1, for more information.

5. Terms and Conditions must be made mandatory in Oracle iStore to use Contract Expert. Set the profile option, IBE: Enforce Terms and Conditions Review by User, to Yes.

Unstructured Contract Terms

Sales representatives in Oracle Quoting have the ability to download the structured contract terms to an .rtf file, make modifications as required and upload the document back into the system where they are considered contract terms (or a portion of the contract terms) on a publishable quote. Sales representatives also can upload a new document (of any file type) and have that document be considered the contract terms. This functionality is known as Unstructured Contract Terms, and the newly added terms are also called *unstructured contract terms*.

Additional Information: The rules and functional descriptions in this section assume that Oracle Sales Contracts is enabled (the profile option, OKC: Enable Sales Contracts, is Yes), and that Oracle Quoting is implemented.

Unstructured Contract Terms Behavior with Oracle iStore

A published quote is considered to have contract terms if the contract source is Structured Terms or an Attached Document. If the source is Attached Document, Unstructured Contract Terms functionality is being used. When the contract source is Structured Terms, there is no change in the behavior of T&Cs.

If Unstructured Contract Terms is being used, but no attachment has actually been uploaded to the contract, then the following occurs in the Checkout: Review Terms and Conditions page:

- The system displays a message that no T&Cs exist.
- The I Agree and I Disagree buttons are disabled.
- The customer can select Cancel to return to the shopping cart page.

Requirements for Displaying T&Cs in HTML

With Unstructured Contract Terms functionality, in order for the T&Cs page to display as intended in HTML format, an attached document must exist on the contract, and the following must be true of the attached document:

- It is flagged as the Primary Contract Document.
- Its category is Contract.
- Its authoring party is Internal.

- It is in .rtf format.
- It is generated from Oracle E-Business Suite.

If the above conditions are true, the attached document is considered mergeable. If the contract source is Attached Document and any of the above conditions are not satisfied, Oracle iStore will show a hyperlink to the attached document in the T&Cs page; selecting the hyperlink will retrieve the document using the default application on the customer's computer (e.g., Microsoft Word). Oracle Contracts APIs evaluate the above conditions (which is done whether or not the contract attachment is considered mergeable).

Express Checkout with Unstructured Contract Terms

When an Express Checkout cart is submitted to the express checkout queue, the system does not validate the presence of any attached documents at that time. It is when the customer selects the *review terms and conditions link* that the validation is done, with the following behavior:

- If the attached document is mergeable, the T&Cs are shown as intended in HTML format.
- If the proper conditions are not right and the terms can't be shown in HTML format, the customer is taken to the T&Cs page and must select the *Click here to Review Terms and Conditions* link to open the document using the default application on his computer.

Note: With Express Checkout, contract terms are associated at the time of converting the cart to an order. The terms and conditions are not checked when the Express Checkout button is clicked.

Integrating Oracle iStore with Oracle Shipping Execution

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Shipping Execution Chapter
- Overview of Oracle Shipping Execution
- Setting up Oracle Shipping Execution

Overview of Integrating Oracle iStore with Oracle Shipping Execution Chapter

This chapter describes the integration of Oracle iStore with Oracle Shipping Execution.

Overview of Oracle Shipping Execution

The Oracle Order Management suite's Shipping Execution module allows you to set up shipping parameters, transportation calendars, pick slip rules, container-item relationships, suppliers (freight carriers), and document printing.

Setting up Oracle Shipping Execution

The Oracle Shipping Execution module must be in place to enable post-order tracking and shipping detail views in Oracle iStore. At a minimum, you must perform the following tasks when setting up Oracle Shipping Execution:

- Define pick slip grouping rules.
- Define release sequence rules.
- Define shipping parameters.

- Define freight carriers.
- Define carrier-shipping method relationships.

See *Oracle Shipping Execution User's Guide* for more information.

Note: Set up shipping methods in Oracle Inventory, not Oracle Shipping.

Integrating Oracle iStore with Oracle Single Sign-On

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Single Sign-On Chapter
- Overview of Single Sign-On
- Single Sign-On Functionality with Oracle iStore
- Implementing Oracle Single Sign-On with Oracle iStore

Overview of Integrating Oracle iStore with Oracle Single Sign-On Chapter

This chapter describes the integration of Oracle iStore with Oracle Single Sign-On (SSO).

Overview of Single Sign-On

Single Sign-On (SSO) provides the capability for enterprises to manage access to applications via a single-authentication architecture. Using SSO, an enterprise is able to avoid maintaining multiple user accounts, thus enhancing security and lowering costs. By leveraging SSO, companies are able to blend their e-commerce applications with existing corporate web assets to provide a single, comprehensive web presence. Single sign-on (SSO) supports this effort by allowing a number of different applications common to an enterprise to share a common authentication service. With Oracle's enterprise-wide Single Sign-On, a user is required to log on, or authenticate himself, only once. The verification of his identity is valid for the duration of the user's session, and for every application participating in the SSO framework. The user session ends, across every application, when he logs out.

For users of the Oracle E-Business Suite, the Single Sign-On framework is provided by Oracle 10G Single Sign-On Application Server (SSO Server). Participating applications can be Oracle E-Business (CRM/ERP) applications, other Oracle applications like Oracle Portal, as well as third-party applications.

Implementing Oracle Single Sign-On Server

Implement Oracle Single Sign-On Server using the appropriate version of the Oracle 10g Application Server documentation. See the *Oracle E-Business Suite Security Guide* for more information.

Single Sign-On Functionality with Oracle iStore

This section describes Oracle iStore's behavior and related rules in the Customer Application with Oracle Single Sign-On enabled.

User Authentication

When integrating Oracle iStore with Oracle SSO, all user authentication processes (except the guest user authentication) are controlled by the SSO Server. Following is the authentication flow.

1. A customer selects a specialty site and can browse the site as a guest user until login.
2. When the customer attempts to log in, the system checks whether the customer has previously been authenticated with the SSO server.
3. If the user has not been SSO-authenticated, the SSO Login page appears, prompting him to enter his credentials. Once authenticated, the customer is taken to the previously selected specialty site page. From here, the customer is treated differently, depending upon whether he is a registered Oracle iStore user:
 - If the customer is a registered Oracle iStore user, he now has full privileges in the sites.
 - If the customer's has submitted an Oracle iStore registration request but his approval is still pending, the system displays a message about the pending registration status; the customer continues to be treated as a guest user. The user's session remains SSO-authenticated.

Note: Underneath the registration status message is a message placeholder for a link to the merchant's organization portal. The message reads, "Click here to go back to the organization portal". Since links directing the user back to the organization portal will be specific per organization, the message is displayed without an actual hyperlink. To alter the existing message placeholder, customize the message JSP, `ibeCZzdMessages.jsp`. Either add a hyperlink for the message, `IBE_PRMT_CLICK_TO_ORG_PORTAL`, or remove it to not use the placeholder.

ICX-Authenticated Users Can Browse as Guest Users

Oracle iStore allows authenticated users (authenticated ICX session), not registered for access to the application, to browse public pages without being automatically logged out. In other words, these users are treated as guest users, even though they are already authenticated. In the typical SSO setup, a user logs into the SSO portal and can then navigate to iStore sites. In this case, the user will have an authenticated ICX session but not be registered as an Oracle iStore user. Oracle iStore treats these users as guest users and displays the catalog and prices of a walk-in user. As with regular logged-in users, these user will see their name in the Welcome bin, will see the Logout icon, and will not see the Register icon. As with guest users, these users can add items to the shopping cart, but if they attempt to access any sensitive pages (e.g., checkout, profile) the system will prompt them to register using Online Access to Existing Account registration.

User Session Parameters

As users navigate the Oracle iStore Customer UI as guest users, they have the ability to choose different languages, currencies, and specialty sites. With SSO, a user's session selections are preserved as the user transitions from a guest user to an authenticated SSO user.

Login/Logout

All Oracle iStore login and logout (sign-in and sign-out) functionality will be provided by the SSO Server.

The sign-in/sign-out links in the Customer UI Welcome Bin and the global sign-in/sign-out icons will point to the SSO Server. The URL for the links and icons are derived from the Oracle Application Technology Foundation profile option that specifies the SSO server location.

User Notification Events

The Oracle iStore Forgot Password notification event will not be used when integrating Oracle iStore with the SSO Server.

For the registration notifications, implementers who use Oracle iStore as their external registration will see no change. If not using Oracle iStore, the notifications will not be used.

User Registration

If integrating Oracle iStore with Oracle SSO Server, the Oracle iStore user registration pages are used by default.

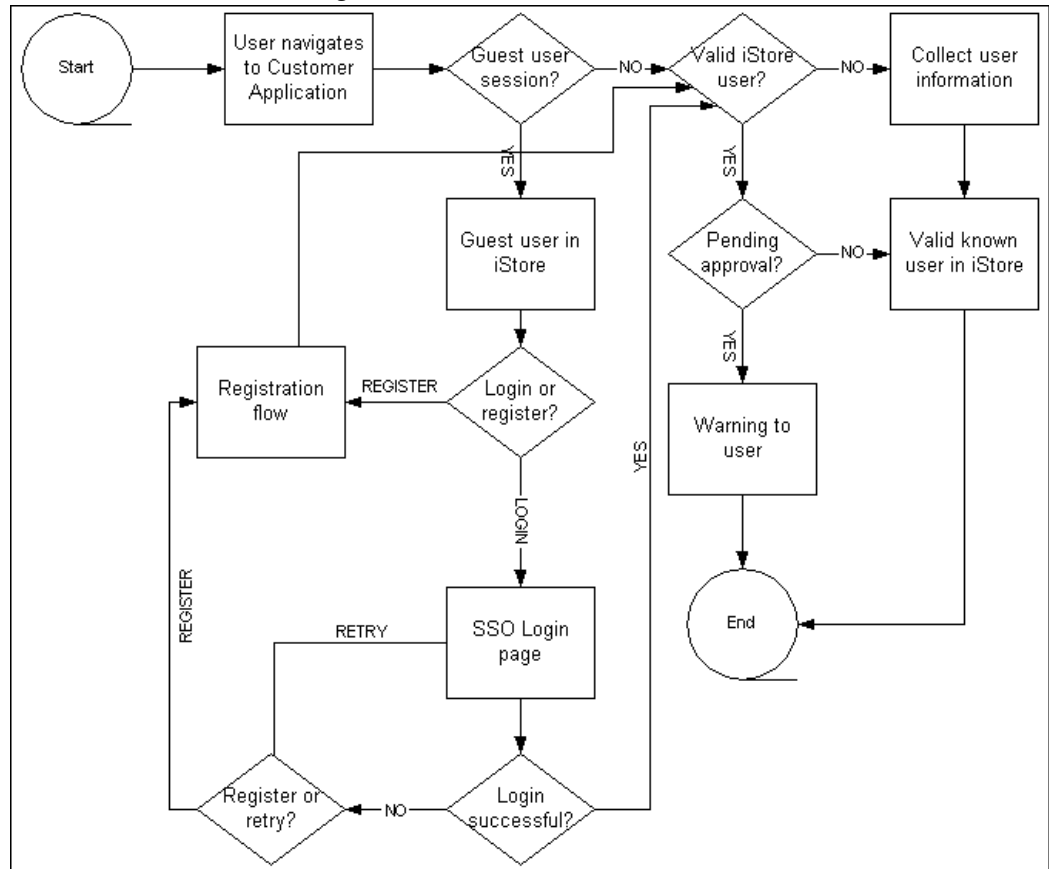
Registration Flow with SSO Enabled

Following is the typical registration flow with the SSO Server enabled. This flow is applicable to B2C, B2B, and partner users.

1. A customer navigates to the Oracle iStore Customer Application.
2. Oracle iStore checks if the user has a valid guest user session.
3. If the user has a valid guest user session, the system considers the user a guest user in Oracle iStore, and the user can browse the catalog and add items to the cart.
4. If the user does not have a valid guest user session, the system checks whether the user is a valid Oracle iStore user. If the user is a valid user, the system checks whether his approval is pending. If his registration is approved, he is considered a valid user for the remainder of the user session. If his registration is not approved, he is shown a message that his registration is not yet approved. If the user is found not to be a valid Oracle iStore user, the system collects his user information so that he can be validated.
5. If the guest user attempts to perform some transaction, he will be prompted to either log in or register. If he attempts to log in, the system displays the SSO login page, where the user logs in (or, if his login is not successful, he is returned to the login page). The user may also register if his login is unsuccessful; in this case, Oracle iStore will call an Oracle Technology Foundation API to determine which registration page the user should be directed to. If it is determined that the Oracle iStore pages should be used, the system displays the Oracle iStore user type selection page, and the registration proceeds as in a non-SSO scenario. If his login is successful, the system validates the user's Oracle iStore user status as in step 4, above.

The following graphic depicts the flow.

Oracle iStore-Oracle SSO Registration Flow



User Registration with CAPs

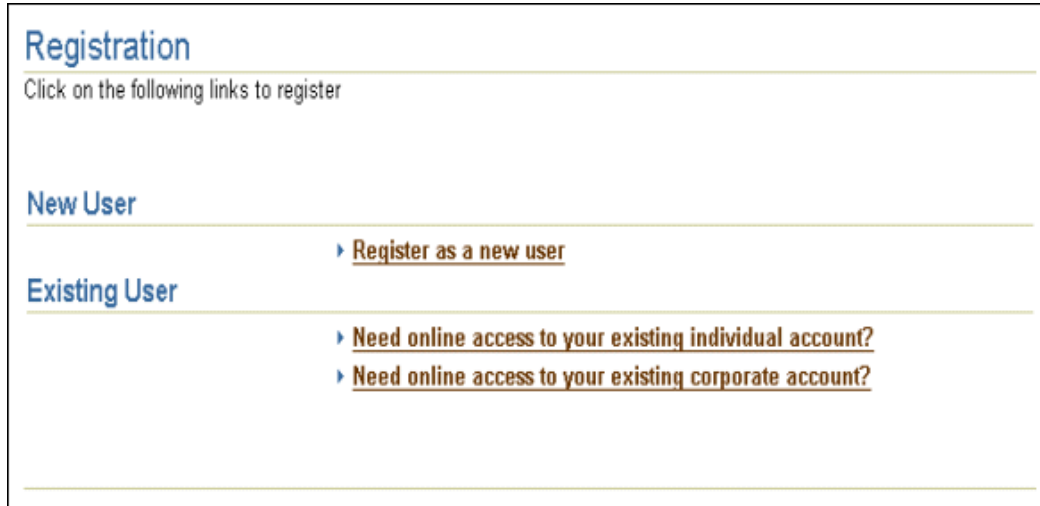
For user registration, implementers can use either their own Central Account Provisioning system (CAPs) or Oracle iStore's registration pages. Oracle iStore's registration pages are used by default. To use a CAPs page, implementers should follow the instructions in the Oracle 10g Application Server documentation mentioned earlier in this chapter. As part of implementing a CAPs, implementers must set the profile option, APPS_CENTRAL_REGISTER_URL. When this profile is defined, the Register global icon in Oracle iStore's Customer Application leads to the CAPs registration page. If the CAPs URL profile is not defined and the profile option, APPS_SSO_USER_CREATE_UPDATE, is set to No, the system disables all registration links. In addition, Online Access to Existing Account functionality from the registration page is disabled when a CAPs page is enabled and user creation (APPS_SSO_USER_CREATE_UPDATE is set to N) is disabled.

When CAPs is enabled, the FND user is created by the CAPs registration framework. If the implementation is set up to require explicit approval of users, until a user is approved, he can access the Customer Application but will not be able to complete any

secure actions (for example, checking on orders or checking out with a cart) until he is approved. In the meantime, he will see a pending approval message.

The following graphic shows how the Oracle iStore registration page might look with CAPs enabled.

Sample Registration Page with CAPs Enabled



Note that the above page would display the Online Access to Existing Account links only if at least one of the online access user types is enabled.

The following tables help illustrate the behavior of the CAPs URL definition and the user creation profile option setting when a user attempts to register.

Registration with CAPs URL Defined

APPS_SSO_USER_CREATE_UPDATE = Y	APPS_SSO_USER_CREATE_UPDATE = N
If Online Access to Existing Account is enabled, the user type list displays with the online access links present.	The CAPs registration page displays.
If Online Access to Existing Account is disabled, the CAPs registration page displays.	Even if Online Access to Existing Account is enabled, the user type links would not be shown.

Registration with CAPs URL Not Defined

APPS_SSO_USER_CREATE_UPDATE = Y	APPS_SSO_USER_CREATE_UPDATE = N
--	--

Oracle iStore registration pages display.

No registration links or icons display anywhere in Oracle iStore.

If Online Access to Existing Account is enabled, the user type list displays with the online access links present.

Registration through Oracle iStore is totally disabled (with the exception of Partial Registration).

For more information on user registration, see the chapter, *Implementing User Management*, page 14-1.

User Management

This section discusses user management functionality with Oracle iStore and SSO integration.

B2B User Management

Without SSO, an Oracle iStore B2B Primary User has the ability to create additional user accounts and to re-set these users' passwords. After these accounts are created -- and if SSO is enabled and passwords are managed external to the Oracle E-Business Suite -- the primary user will not be able to change the password for these users. The password reset box normally available to the Primary User will be unavailable in this scenario.

Oracle iStore does not provide the capability to manage multiple Oracle E-Business Suite accounts per SSO user. Only the current, default Oracle E-Business Suite account that is enabled for SSO is supported when using Oracle iStore.

Password Changes by Customers

Oracle iStore customers can change their passwords in the Customer UI personal information profile screens. In the Personal Information page, when SSO is enabled and passwords managed externally, customers will see a link directing them to the SSO page, where they can change their passwords.

Applications SSO User Creation and Updation Allowed Profile Impact

When the profile option, Applications SSO User Creation and Updation Allowed, is set to Disabled, primary users will be unable to set start and end dates for users in the Oracle iStore user management pages. The start/end date fields will be read-only. See the Oracle Single Sign-On Server documentation for more information about the profile option.

Oracle iStore Sensitive Pages

When SSO is enabled, Oracle iStore does not support forced re-authentication via sensitive pages. Implementers should set the profile option, IBE: Use Sensitive Pages, to No to turn off the forced re-authentication in Oracle iStore. Thus, when SSO is enabled, SSO-authenticated users are not prompted to re-enter their passwords when navigating from non-sensitive pages (for example, the shopping cart page) to sensitive pages (for example, the shipping page).

Language Support

Users will need to install languages for SSO that are supported by Oracle iStore. The SSO Login page will have the same UI for all users and sites, but will contain the content appropriate for a particular language based on the user's browser settings.

SSO Logout Page With Partner Site Outside of Oracle Applications

In the case of Oracle Partner Management integration with Oracle Single Sign-On Server (SSO), the logout page will be the Oracle iStore logout page if the following is true:

- Oracle iStore is being used for user registration framework, approvals, etc.
- Oracle Single Sign-On is enabled for an Oracle Partner Management instance set up outside of Oracle Applications
- A B2B user has just registered and logs out through Oracle iStore after accessing the Partner instance

The flow below helps illustrate the scenario:

1. User submits registration request from Oracle iStore registration page.
2. User navigates to Partner application (outside of Oracle Applications), that is SSO-enabled.
3. User returns to Oracle iStore site.
4. User logs out.
5. The Oracle iStore logout page is retrieved instead of the SSO logout page.

Implementing Oracle Single Sign-On with Oracle iStore

There are no Oracle iStore-specific setups that are required for SSO. Implement Oracle Single Sign-On Server using the appropriate version of the Oracle 10g Application

Server documentation (See the section, "Implementing Oracle Single Sign-On Server", above).

Integrating Oracle iStore with Oracle Application Server Web Cache

This chapter covers the following topics:

- Overview of Integrating Oracle iStore with Oracle Application Server Web Cache 10g Chapter
- Overview of Oracle Application Server Web Cache 10g
- Oracle iStore Functionality with Oracle Application Server Web Cache 10g
- Setting up Oracle Application Server Web Cache 10g
- Partial Web Cache
- Dynamic Page Cacheability for Section Configurable Layout

Overview of Integrating Oracle iStore with Oracle Application Server Web Cache 10g Chapter

This chapter describes the integration of Oracle iStore with Oracle Application Server Web Cache 10g.

Important: Oracle iStore is certified with Oracle Application Server Web Cache 10g (10.1.2). Implementers should refer to Oracle Application Server Web Cache 10g documentation for detailed menu steps, both those generic in nature and those specific to the setup of Oracle iStore.

Oracle iStore with Oracle Content Manager integration is not certified with Oracle Application Server Web Cache 10g. If Oracle Content Manager is enabled, .gif/.jpg files will not be cached.

Overview of Oracle Application Server Web Cache 10g

An integrated component of Oracle's application server infrastructure, Oracle Application Server Web Cache 10g is an innovative content delivery solution designed to accelerate dynamic web-based applications and reduce hardware costs.

Oracle Application Server Web Cache 10g accelerates the customer presentation of Oracle iStore's non-transactional content, including:

- Static pages and images
- Catalog pages

By compressing and caching dynamically generated content, Oracle Application Server Web Cache 10g reduces the load on the other tiers in the architecture and shortens the amount of time required to serve cached content. Once a page is loaded into the cache, other requests for the same page are served from the cache memory instead of the application server.

Through the inclusion of a set of Oracle Application Server Web Cache 10g-specific tags in the HTML, Oracle Application Server Web Cache 10g is also capable of caching content with some personalization.

Additionally, the cache server can load balance requests across multiple HTTP servers.

Oracle Application Server Web Cache 10g is compatible with Oracle HTTP Server or any other HTTP-compliant application web server.

Possible scenarios for deployment of Oracle Application Server Web Cache 10g include the following:

- Deploy Oracle Application Server Web Cache 10g on the same computer as the application web server or on a separate computer.
- Use Oracle Application Server Web Cache 10g as a load balancer or in a Failover pair.
- Install Oracle Application Server Web Cache 10g inside or outside the firewall.

Oracle iStore Functionality with Oracle Application Server Web Cache 10g

In order to integrate Oracle Application Server Web Cache 10g with the Oracle iStore Customer UI, you must deploy it in the same domain as the application web servers. The reason for deploying it in the same domain is that Oracle iStore session cookies are created by application servers and are only visible to other servers within the same domain. The subdomain, however, can be different.

You can set up Oracle Application Server Web Cache 10g to cache and serve the following Oracle iStore pages and files:

- Catalog JSPs
 - ibeCCt*.jsp
- Other pages, such as:
 - style sheet files
 - static HTML pages
 - GIF and JPG/JPEG image files
 - JavaScript (*.js) files
 - jtfdload.jsp files

For complete information about Oracle Application Server Web Cache 10g deployment, see documentation for Oracle Application Server Web Cache, Release 10g. If you are running a version of Oracle Application Server Web Cache 10g other than the one listed here, please use the documentation appropriate to your version.

Preview Mode Not Supported Through Oracle Application Server Web Cache 10g

Oracle iStore's Preview mode allows merchants to preview Customer UI specialty sites while working on them in the Site Administration UI. In a typical scenario, when the merchant selects the Preview button in Site Administration UI, the Customer UI is retrieved through the application server and uses data cached through JTT Cache. This ensures freshly cached data.

There may be cases, however, when the merchant enters Preview mode through Oracle Application Server Web Cache 10g. This type of preview is not supported due to likelihood of seeing stale cached data.

Using Oracle Application Server Web Cache 10g with SSL

Other than setting the profile options listed in the next paragraph, nothing specific from Oracle iStore is required when using Oracle Application Server Web Cache 10g with Secure Socket Layer (SSL) functionality. Check Oracle Application Server Web Cache 10g documentation for details of setup with SSL.

When integrating Secure Socket Layer functionality with Oracle Application Server Web Cache 10g, set the profile options, IBE: iStore Non Secure URL and IBE: iStore Secure URL to the web cache non secure and secure URL.

For example, set IBE: iStore Secure URL to `https://<web cache servername>:<port number>/<JSP directory or OA_HTML>/`.

Bounce the server after making these changes.

Setting up Oracle Application Server Web Cache 10g

Set up Oracle Application Server Web Cache 10g to cache and serve Oracle iStore Customer UI pages, using the procedures in the following sections.

For complete information about Oracle Application Server Web Cache 10g deployment, see documentation for Oracle Application Server Web Cache, Release 10g. If you are running a version of Oracle Application Server Web Cache 10g other than the one listed here, please use the documentation appropriate to your version.

Prerequisites

Your Oracle iStore implementation must meet the following requirements for integration with Oracle Application Server Web Cache 10g:

- Your sites must not allow Express Checkout. Set the profile option IBE: Use Express Checkout to No.
- Your sites must use the site price lists. Set the profile option IBE: Use Price List Associated with Specialty Site to Yes.
- Set the profile option IBE: Use Web Cache Feature to Yes. This enables Oracle iStore to create the cookies that you will set up Oracle Application Server Web Cache 10g to use for session tracking.

Implementation Steps

- Step 1 - Perform Initial Setup for Oracle Application Server Web Cache 10g
- Step 2 - Create a Rule for Multiple Documents with Same Selector (URL) by Cookies
- Step 3 - Create Session/Personalized Attribute Definitions
- Step 4 - Create Session/Personalized Attribute Related Caching Rules
- Step 5 - Create Cacheability Rules
- Step 6 - Create Expiration Rules
- Step 7 - Create a Selector Association for the Multiple Documents Rule
- Step 8 - Create Selector Associations for Sessions and Personalized Attributes
- Step 9 - Create Session-Encoded URL Association
- Step 10 - Set Up Test Environment

Step 1 - Perform Initial Setup for Oracle Application Server Web Cache 10g

Check your deployment requirements. Make sure the following Oracle Application Server Web Cache 10g setups are correct:

- Administration Port and Protocol
- Invalidation/Statistics Port and Protocol
- Security
- Resource Limits
- Process Identity
- Apology Pages
- Application Web Servers
- Web Cache Listen Ports
- Access Logs
- Origin servers – Ensure that they are pointing to the web server port.
- Site definitions – Make sure that the port is pointing to the Oracle Web Cache server listener port.
- Site to server mapping – Set up the mapping between the origin server and the Web Cache server.

Step 2 - Create a Rule for Multiple Documents with Same Selector (URL) by Cookies

You can set up Oracle Application Server Web Cache 10g to use the Oracle iStore cookie, CombinedCookie, to identify multiple versions of the same catalog page based on the cookie value. CombinedCookie allows the Web Cache to then cache the page versions separately for different users.

CombinedCookie combines:

- Minisite ID (minisite_id)
- Responsibility ID (resp_id)
- Language (language_code)
- Currency (currency_code)

- Customer type - Customer type can be anonymous, individual, business, or primary business user.

While serving a page, Web Cache looks at the CombinedCookie to determine if the appropriate version of the page is available in the cache. If it is available, then the page is served from the cache. If it is not, the request is forwarded to Apache/Jserv and the resulting page is cached against that page version.

Using the steps below, create a rule for multiple documents with the same selector by the CombinedCookiecookie.

You will later create a selector association between this rule and the catalog JSPs, as described later in this chapter.

Steps

1. In Oracle Application Server Web Cache Manager, select Rules for Caching, Personalization, and Compression > Cookie Definitions.
2. In the Cookie Definitions screen, select Add.
3. In the Edit/Add Cookie Definition screen, enter CombinedCookie in the *Enter cookie name:* textbox.
4. In answer to the question, *Also cache documents whose requests do not contain this cookie?*, select No.
5. Select Submit.

Step 3 - Create Session/Personalized Attribute Definitions

Session tracking does not alter the actual content of a page. Therefore, session definitions enable Oracle Application Server Web Cache 10g to share the same caches with multiple sessions by substituting one user's session information with another's based on the session information in the session cookies.

For Oracle Application Server Web Cache 10g to serve pages to a client browser, the browser's cookies must be enabled. If cookies are disabled, Oracle iStore still works, but Web Cache does not serve its pages. Instead, Web Cache redirects any HTTP request that does not include session cookies to the application servers.

Oracle iStore uses the following session cookies:

- JTT Session Cookie - Contains information about the JTT session
- ICX Session Cookie - Contains information about the database session

You must create the session definitions JTTSession and ICXSession so that Web Cache can track the session cookies.

You must also create personalized attribute definitions for the Oracle iStore cookies

PersonName and CartTotal.

Oracle Application Server Web Cache 10g can use the Oracle iStore cookies listed in the following table to share the same cache with multiple users by substitution of personalized information into the catalog pages' welcome bin.

Oracle iStore Cookies for Welcome Bin Personalization

Cookie	Function
UserNameCookie	PersonName
CartTotalCookie	CartTotal
ICXSession	The ICX Session Cookie name is <DB_HOST>_<DB_NAME>, where the values for DB_HOST and DB_NAME come from the .dbc file in the directory \$FND_TOP/secure/. The same value should be put in URL or POST Body Parameter.
JTTSession	The JTT Session Cookie name is <<DB_HOST>_<DB_NAME>_p<JTT Cookie property value>. You can set the property in Oracle Business Center. The same value should be put in URL or POST Body Parameter.

Oracle Application Server Web Cache 10g's substitution of personalized information into cached pages is called Session-Encoded URL Association. `ibeCAcdWelcome.jsp`, the seeded JSP for the Welcome Bin, includes the Oracle Application Server Web Cache 10g tags for Session-Encoded URL Association within HTML comments, which are transparent to application servers. You will later enable Session-Encoded URL Association as described in the section, "Create Session-Encoded URL Association".

If you are previewing the specialty site display of items and sections before publishing them, you should access the application server directly and not via Web Cache. This ensures that you are previewing the latest version of the pages.

Steps

1. In Oracle Application Server Web Cache Manager, select Rules for Caching, Personalization, and Compression > Session Definitions.
2. In the Session Definitions screen, select Add.
3. Select either the *For all sites* or *Specific site* radio button, depending upon whether

you have enabled the Oracle E-Business Suite Web Cache rules to be site specific or generic to all sites. If you have defined the Oracle E-Business Suite Web Cache rules to be site specific, then Oracle iStore rules also should be site specific. Conversely, if you have defined the Oracle E-Business Suite Web Cache rules to be for all sites, then ensure that the iStore cacheing rules are for all sites. Also ensure that the Oracle iStore cacheing rules are sequenced prior to the Oracle E-Business Suite Web Cache rules.

4. Using the data in the following table, create the sessions and personalized attributes listed in the table.
5. Select Submit.

The following table shows the session and personalized attribute definitions.

Web Cache Session and Personalized Attribute Definitions

Session/Attribute	Cookie Name
UserNameCookie	PersonName Additional Information: Leave URL or POST Body Parameter values blank.
CartTotalCookie	CartTotal Additional Information: Leave URL or POST Body Parameter values blank.
ICXSession	See Finding a Value for ICXSession Cookie, page 33-9, below. Additional Information: The same value should be put in URL or POST Body Parameter.

Session/Attribute	Cookie Name
JTTSession	See Finding a Value for JTTSession Cookie, page 33-9, below. Additional Information: The same value should be put in URL or POST Body Parameter.

Note: Customers who are running Oracle iStore patchset IBE.M and above must remove or disable the following two personalized attributes and related caching rules: SignInOutUrlCookie and SignInOutImageCookie. These personalized attributes were obsoleted in Oracle iStore patchset IBE.M.

Finding a Value for ICXSession Cookie

Derive the ICXSession cookie value from the following procedure:

1. Find the value of the ICX_PARAMETERS.SESSION_COOKIE_NAME column:

Look at the ICX_PARAMETERS.SESSION_COOKIE_NAME using the following query:

```
select session_cookie_name from icx_parameters
```

2. If the ICX_PARAMETERS.SESSION_COOKIE_NAME value is null, look up the APPS_DATABASE_ID profile value. To do so, log into Oracle Forms with System Administrator responsibility and query for the profile in the Find System Profile Values Form. For more information about using Oracle Applications profile options, see the *Oracle E-Business Suite Setup Guide*.
3. If the APPS_DATABASE_ID profile value also is null, then the ICX cookie name should be derived from DB_HOST_DB_NAME.

Finding a Value for JTTSession Cookie

The value for JTTSession cookie is the ICXSession cookie name value (plus _p) with the JTTCookie property value appended. In other words:

JTTSession Cookie name = <ICX Session cookie name>_p<JTTCookie Property Value>

Use the following procedure to find the value of the JTTCookie property value:

1. Log in to Oracle CRM Login Servlet as the System Administrator.
2. Navigate to Settings, then Properties, then Advanced.

3. Select JTF in the View list of values.
4. Find the key, cookie_name, in the table. This is the value of the JTTCookie property to use in the JTTSession cookie value. Find the key, cookie_name, in the table. This is the value of the JTTCookie property to use in the JTTSession cookie value.

Note: Ignore the semicolon (;) in the property value.

Step 4 - Create Session/Personalized Attribute Related Caching Rules

You must create caching rules for the sessions and personalized attributes that you have defined. Use the following steps to create caching rules for previously established sessions.

Steps

1. In Oracle Application Server Web Cache Manager, select Rule Association > Session Caching Policy Association.
2. In the Session Caching Policy Association screen, select Add.
3. In the Add Session Caching Policy screen, select a session and answer the questions for the session, using the parameters specified in the table below.
4. Select Submit when finished.

Web Cache Session/Personalized Attribute Caching Rules

Session	Cache documents whose requests contain this session?	Cache documents whose requests do NOT contain this session?	Can the default session value be used for substitution...?
UserNameCookie	Yes	No	No
CartTotalCookie	Yes	No	No
ICXSession	Yes	Yes	No
JTTSession	Yes	No	No

Note: If you have already set up Oracle Application Server Web Cache 10g with iStore 11.5.6, please remove the following personalized attribute definitions and the related caching rules: SignInOutImageCookie and SignInOutUrlCookie.

Step 5 - Create Cacheability Rules

Set up Oracle Application Server Web Cache 10g to cache all Oracle iStore catalog pages, except `ibeCCtpBuyRoute.jsp`, for the HTTP methods GET, GET with query string, and POST with any parameters. The Oracle iStore catalog pages are named `ibeCCt*.jsp`.

Additional Guidelines

- `ibeCCtpBuyRoute.jsp` is not cacheable because it invokes the real-time shopping cart process and is a route page to the shopping cart display page. Oracle Application Server Web Cache 10g can cache all other catalog route pages.
- Additionally, you can set up Oracle Application Server Web Cache 10g to cache style sheet files, static HTML pages, GIF and JPG/JPEG image files, JavaScript (*.js) files, and `jtfdload.jsp`.
- You should enable compression of all JSPs and HTML pages, and disable compression of images. You can enable or disable compression of JavaScript files and style sheets. Style sheets should not be compressed for Netscape browsers.
- Javascript compression for Internet Explorer browsers should not be enabled.

Steps

1. In Oracle Application Server Web Cache Manager, select Rules for Caching, Personalization, and Compression > Caching, Personalization, and Compression Rules.
2. Select the last default rule or the last site specific (depending upon whether caching rules are site specific or for all sites) and press Insert Below.
3. Using the data in the following tables, create cacheability rules.
4. Select Submit when finished.

The following table shows Part 1 of the cacheability rules.

Web Cache Cacheability Rules (Part 1)

Priority	Name	Expression Type	URL Expression	HTTP Methods
1	iStore as files	Regular Expression	\.js\$	GET, GET with query string

Priority	Name	Expression Type	URL Expression	HTTP Methods
2	iStore route jsp files	Regular Expression	/OA_HTML/ibeCCtpBuyRoute\jsp.*	GET, GET with query string, POST
3	iStore Catalog jsp files	Regular Expression	/OA_HTML/ibeCCt.*\jsp.*	GET, GET with query string, POST
4	iStore jtfdload files	Regular Expression	/OA_HTML/jtfdload.jsp	GET, GET with query string

The following table shows Part 2 of the cacheability rules.

Web Cache Cacheability Rules (Part 2)

Priority	URL and POST Body Parameters	POST Body Expression	Cache Policy	Compression	Enabled
1	n/a	n/a	Cache	None	Yes
2	n/a	.*	Don't cache	On for all browsers	Yes
3	n/a	.*	Cache	On for all browsers	Yes
4	n/a	n/a	Cache	None	Yes

Step 6 - Create Expiration Rules

When you change catalog content, Oracle Application Server Web Cache 10g does not automatically invalidate cached pages. You must define expiration rules based on a time interval or invalidate cached pages manually in Web Cache Manager. Expiration rules specify when documents expire in the cache, and how long documents can reside in the cache after they expire.

You should set up your expiration rules according to your content management needs. Since Oracle iStore JSPs and HTML pages do not include expiration headers, you cannot set up expiration rules for these pages using "As per HTTP Expires header."

Here is an example of some expiration rules that you can define:

- Invalidate all scripts, style sheet files, cached JSPs, and cached HTML pages every two hours after cache entry, then refresh them within two minutes based on the application servers' capacity.
- Invalidate all image files every two days after cache entry, then refresh them within five minutes based on the application servers' capacity.

To set up these sample expiration rules, use the following procedure.

Steps

1. In Oracle Application Server Web Cache 10g Manager, select Rules for Caching, Personalization, and Compression > Expiration Policy Definitions.
2. In the Expiration Policy Definitions screen, select Add.
3. In the Create Expiration Policy screen, add two expiration policy definitions, using the following table as a guide.
4. Select Submit when finished.

The following table shows the expiration rules setup for Expire and After Expiration.

Web Cache Expiration Rules (Part 1)

Expire	After Expiration
7200 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 120 seconds after expiration
172800 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 300 seconds after expiration

After adding the expiration policy definitions, create the rule associations using the following steps and table.

Steps

1. In Oracle Application Server Web Cache Manager, select Rule Association > Expiration Policy Association.
2. In separate procedures, select the radio buttons of the rules shown in the table above and press the Change Rule Association button.

3. In the Change Expiration Policy Association screen, map the expiration rules and selector associations listed in the following table.
4. Press Make Association when finished.

The following table shows the expiration rules setup for Expire, After Expiration, and Selector Association.

Web Cache Expiration Rules (Part 2)

Expire	After Expiration	Selector Association
7200 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 120 seconds after expiration	\\.html?\$, \\.css, \\.js\$, /OA_HTML/ibeCCt.*\\.jsp.*
172800 seconds after cache entry	Refresh on demand as application web server capacity permits AND no later than: 300 seconds after expiration	\\.gif jpe?g png)\$, /OA_HTML/jtfdload\\.jsp.*

Step 7 - Create a Selector Association for the Multiple Documents Rule

Create a selector association to associate catalog JSPs with the rule for multiple documents with the same selector by the Oracle iStore cookie CombinedCookie.

Steps

1. In Oracle Application Server Web Cache Manager, select Rule Association > Cookie Association.
2. In the Cookie Association screen, select the rule for the cookie, CombinedCookie, and select Change Rule Association.
3. In the Change Cookie Association screen, create an association between the selector /OA_HTML/ibeCCt.*\\.jsp.* and the rule.
4. Press Make Association when finished.

Step 8 - Create Selector Associations for Sessions and Personalized Attributes

You must associate the selectors that are listed in your cacheability rules with the sessions and personalized attributes that you have defined. Apply the session

definitions JTTSession and ICXSession to all cached JSPs. Do not bind them to other cached files, such as image files and scripts. Use the following steps to create selector associations for sessions/personalized attributes.

Steps

1. In Oracle Application Server Web Cache Manager, select Rule Association > Session Caching Policy Association.
2. In the Session Caching Policy Association screen, select a session or attribute and press Change Rule Association.
3. In the Change Session Caching Policy Association screen, make the selector associations listed in the following table for each session and attribute.
4. Press Make Association when finished.

The following table shows the session or attribute and the selector associations.

Web Cache Session/Personalized Attribute Selector Associations

Session/Attribute	Selector Associations
UserNameCookie	/OA_HTML/ibeCCt.*\jsp.*
CartTotalCookie	/OA_HTML/ibeCCt.*\jsp.*
ICXSession	/OA_HTML/ibeCCt.*\jsp. */OA_HTML/jtfdload.jsp
JTTSession	/OA_HTML/ibeCCt.*\jsp. */OA_HTML/jtfdload.jsp

Step 9 - Create Session-Encoded URL Association

Use the following procedure to set up session-encoded URL association.

Note: The functionality previously referred to as "simple personalization" is now termed "session-encoded URL association".

Steps

1. In Oracle Application Server Web Cache Manager, select Rule Association > Session-Encoded URL Association.
2. In the Session-Encoded URL Association screen, select an association and press Change Rule Association.

3. In the Change Session-Encoded URL Association, from the list, select the following:
 - <your Web Cache host: port>, /OA_HTML/ibeCct.*\.jsp.*, GET/GET with query string/POST, *
4. Select Make Association.

Web Cache Simple Personalization Selector Association

Selector	Parse HREFs
/OA_HTML/ibeCct.*\.jsp.*	NO

Step 10 - Set Up Test Environment

You can validate cacheability rules by monitoring three log files:

- The Oracle Application Server Web Cache 10g access log
- The Oracle Application Server Web Cache 10g event log
- The application server's access log

Set up the Oracle Application Server Web Cache 10g event log in verbose mode using the following procedure.

Steps

1. In Oracle Application Server Web Cache 10g Manager, choose Administering Oracle Web Cache > Event Logging.
2. Click Edit and check YES for Verbose mode.
3. Apply the change to Oracle Application Server Web Cache 10g.

Post-Setup Step

After performing the Web Cache setups, bounce the Application server.

Partial Web Cache

Oracle iStore supports using Partial Web Cache to dynamically cache parts of catalog pages. Out-of-the-box, only the seeded Welcome Bin uses this feature. This section outlines how to use Oracle iStore Partial Web Cache feature in your customized JSPs.

Partial Web Cache Overview

Also known as Partial Page Caching in Oracle Application Server Web Cache 10g, this functionality provides dynamic assembly of web pages with both cacheable and non-cacheable page fragments. Therefore, web pages can be broken down into fragments of different cacheability profiles. These fragments are each maintained as separate elements in the application web server or content delivery network. The fragments are assembled into HTML pages as appropriate when requested by end users. The page assembly can be conditional, based on information provided in HTTP request headers or end-user cookies.

The basic structure a content provider uses to create dynamic content is a template page (container page) containing HTML fragments (for example, Oracle iStore bins). The container page is associated with the URL that end users request, and also configured with Edge Side Includes (ESI) markup tags that tell Oracle Application Server Web Cache 10g to fetch and include each individual bin.

Out-of-the-box, Partial Web Cache is pre-integrated with Oracle iStore section layout pages and the seeded Welcome Bin.

Terminology

The following terminology will be used in this section:

- **ESI Bin** --- The HTML fragment page included into the container page through ESI tag
- **ESI Container Page** --- The template page that contains ESI bins

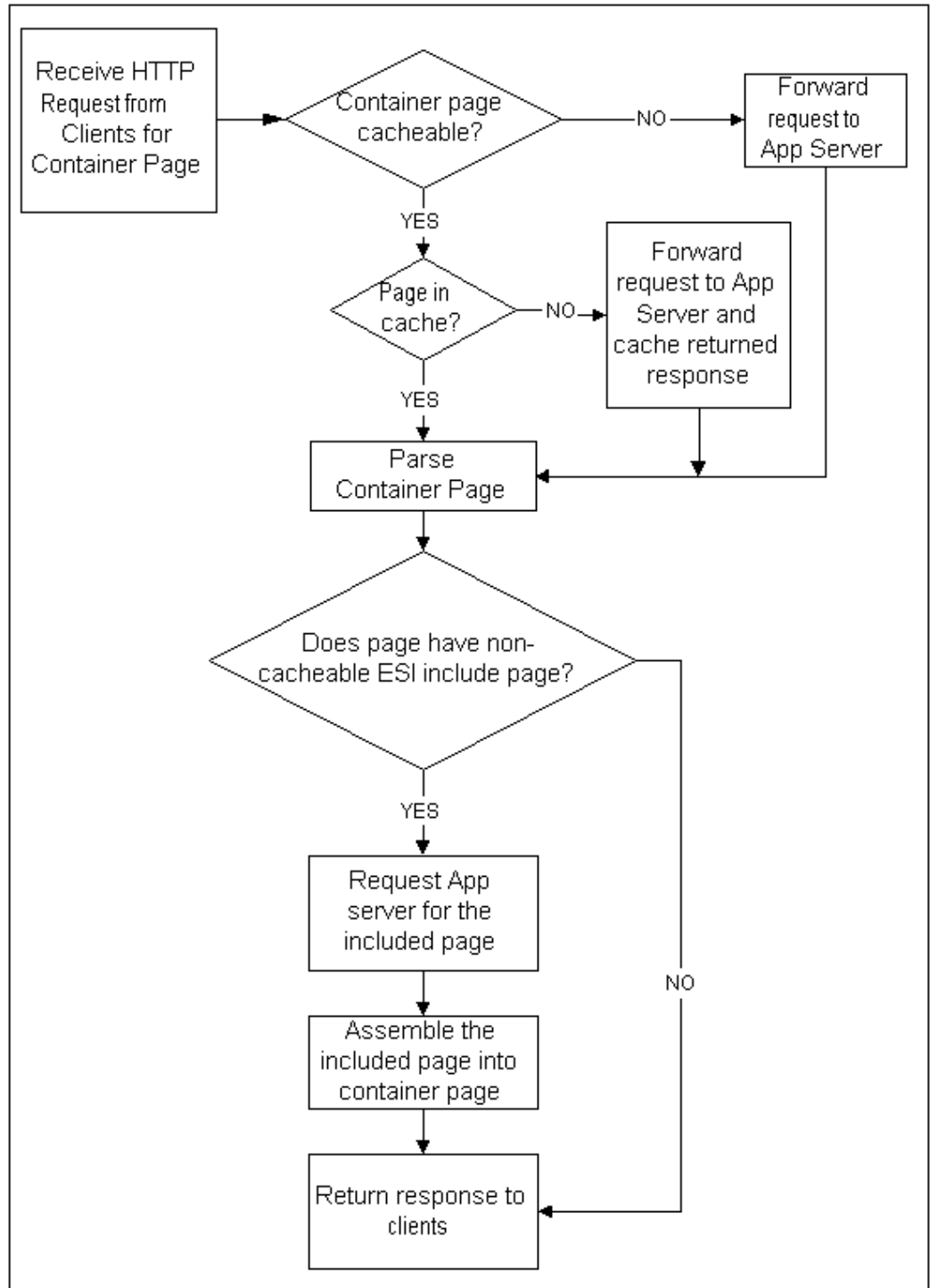
Partial Web Cache Functional Flow

Following is the Partial Web Cache functional flow:

1. An HTTP request is made for a container page.
2. If the requested container page is cacheable, web cache checks to see if the page is already in the cache.
3. If the requested container page is not cacheable, or if the page is not in the cache, the request is forwarded to the application server which serves up the parsed container page.
4. From here, the application checks to see if the container page has a non-cacheable ESI include -- If not, the request is fulfilled.
5. If the container page does have a non-cacheable ESI include page, then the included page is assembled into the container page, and the request is fulfilled.

The following figure depicts the flow:

Partial Web Cache Functional Flow



Partial Web Cache Prerequisites

The following are required before implementing this technology:

- Oracle9iAS Web Cache 9.0.2 or later
- Oracle iStore Release 11.5.10 or later

Implementing Partial Web Cache

Following are the steps to implement Partial Web Cache:

- Understand Partial Web Cache
- Plan Your Customization
- Customize ESI Bin
- Customize ESI Container Page
- Post-Setup and Testing

Understand Partial Web Cache

When you are preparing to customize your pages to support Partial Web Cache, you first must understand the concepts of partial web cache and ESI INCLUDE, the flow involved in the ESI pages, and the corresponding interactions between the Oracle Application Server Web Cache 10g and the Oracle iStore application server. Please refer to Oracle Application Server Web Cache 10g documentation for more details.

Plan Your Customization

In the planning phase, you need to go through the following questions one by one:

1. What customization do I need?

Normally, there are two customization cases you can choose:

1. Web-cacheable ESI container page with non-web-cacheable ESI bin
2. Non-web-cacheable ESI container page with web-cacheable ESI bin.

Think through your business needs and decide which case applies to your organization.

1. Which bin(s) needs to be customized as ESI bin(s)?

Out-of-box, only the Welcome Bin is an ESI bin. You can customize other seeded bins, or your customized bins, to be ESI bins. Decide which bin(s) should be customized.

Note that the candidate bin(s) should have different web-cacheability than its container page, or at least one of its container pages (if being included by many container pages).

1. Where should I map my new ESI bin to Oracle iStore runtime?

Find the template access name and the corresponding mapped JSP through the Site Administration UI Template Manager.

1. Do I need to customize the container page as an ESI container page?

Normally, you do not need this step if your ESI bin is included in the seeded Oracle iStore container page, unless you have a customized container page, and this container page includes some ESI bins that have different web-cacheability rules.

An ESI bin behaves as a regular bin if being included in a non-ESI container page.

1. Which container page needs to be customized?

Find the template access name and the corresponding mapping condition for your ESI bin JSP page through the Site Administration UI Template Manager.

1. Where should I map my new ESI container page to Oracle iStore runtime?

Find the template access name and the corresponding mapping condition for your ESI container JSP page through the Site Administration UI Template Manager.

1. What file name should I use for my new ESI bin and ESI container page?

You should follow the following name convention to name your new ESI bins and container Pages:

1. ibeCCt*.jsp for web-cacheable ESI container pages and ESI bins
2. Any other names for non-web-cacheable ESI container pages and ESI bins

Also pay attention to the template access names of your ESI bins. They should NOT end with IBEWC. See the section, "Dynamic Page Cacheability for Section Configurable Layout", in this chapter, for more information.

1. How should I test my new ESI pages?

First set up the Oracle Application Server Web Cache 10g server and the Oracle iStore application server, and ensure that these work properly for all the of the out-of-box Oracle iStore pages. Then come up with a good test plan to test your customized ESI bins and ESI container pages later.

Customize ESI Bin

Oracle Application Server Web Cache 10g server handles ESI container page and ESI bin page as individual cache entities that can be configured separately. Therefore, you need to customize an ESI bin only when it has different web cache cacheability than its

container page.

Also, ESI bins would behave just as regular bins, when:

1. Being included inside non-ESI container pages
2. Web Cache is not enabled

Steps

1. Set the following page context at the very beginning; and
2. Include `ibeCWcpESIBinTop.jsp` instead of `ibeCZzpRuntimeIncl.jsp`, as below:

```
<% pageContext.setAttribute("esiURL"); %>  
<!--@ include file=" ibeCZzpRuntimeIncl.jsp" -->  
<%@ include file="ibeCWcpESIBinTop.jsp" %>
```

1. Include `ibeCWcpESIBinBottom.jsp` at the end, as below:

```
<%@ include file="ibeCWcpESIBinBottom.jsp" %>
```

1. Do not use Web Cache Personalization tags

Example: Only the code marked in bold is specific to an ESI bin:

```
<% pageContext.setAttribute("esiURL", "ibeCAcdWelcome.jsp", PageContext.  
REQUEST_SCOPE); %>  
  
<%@ include file="ibeCWcpESIBinTop.jsp" %>  
  
<%  
final String J = "ibeCAcdWelcome.jsp";  
if (! RequestCtx.userIsSalesRep()) {  
boolean bEnableTransaction = !RequestCtx.userIsStoreAdmin();  
boolean bMaintenanceMode = IBEUtil.isMaintenanceMode();  
String _binTitle = mm.getMessage("IBE_PRMT_WELCOME_G");  
%>  
  
<%@ include file="ibeCZzdBinTop.jsp" %>  
<span class="sectionHeaderBlack">  
<%=RequestCtx.getPersonName()%>  
</span>  
<br>  
//?  
<%  
if (shopCart != null) {  
out.println(mm.getMessage("IBE_PRMT_SC_TOTAL2"));  
out.println(PriceObject.formatNumber(currencyCode, totalPrice));
```

```

    }
    else {
        out.println(mm.getMessage("IBE_SC_NOITMS_CART"));
    }
    IBEUtil.log(J, "Shopping cart blurb end");
%>
//?
<%@ include file="ibeCZzdBinBottom.jsp" %>
    <%
} // end if (! RequestCtx.userIsSalesRep()) %>
<%@ include file="ibeCWcpESIBinBottom.jsp" %>
<!-- ibeCAcdWelcome.jsp end -->

```

Customize ESI Container Page

Out-of-box, Oracle iStore has two common section layout options (Fixed Layout and Configurable Layout). Both are ESI container pages. Therefore, in most cases, you do not need to customize ESI container page, unless:

1. You have a customized section layout page that needs to support Partial Web Cache.
2. You want to support Partial Web Cache page in some other Oracle iStore container pages, like Item Detail Page.

Steps

1. Include `ibeCWcpESIContainer.jsp` right after `ibeCZzpHeader.jsp` as below:

```

<%@ include file="ibeCZzpHeader.jsp" %>
<%@ include file="ibeCWcpESIContainer.jsp" %>
<%@ include file="ibeCWcpHeader.jsp" %>

```

1. Dynamically include the ESI bin page in the appropriate place. Replace `MyEsiBinPage.jsp` with your real ESI bin jsp.

```

<jsp:include page="MyEsiBinPage.jsp" flush="true" /><br>

```

Example: Only the code marked in bold is specific to ESI Container Page.

```

<%@include file="jtfincl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.jtf.base.Logger" %>

```

```

<%@page import="oracle.apps.ibe.displaymanager.*" %>
<%@ include file="ibeCZzpHeader.jsp" %>
<%@ include file="ibeCWcpESIContainer.jsp" %>
<%@ include file="ibeCWcpHeader.jsp" %>
<%
    String JSP_PAGE_NAME = "ibeCCtdCmnSt.jsp";
    int lSectionId = -1;
    String lSectionIdStr = "";
    String lPageTitleStr = "";
    Section lSection = null;
    String browsePage = "", pathPage = "", welcomePage = "",
    globalPage="";
    String lCenterDisplayPage = "";
    String lRhsBin1="", lRhsBin2="", lRhsBin3="", lRhsBin4="",
    lRhsBin5="",
    lRhsBin6="", lRhsBin7="";
    String lLhsBin1="", lLhsBin2="", lLhsBin3="", lLhsBin4="",
    lLhsBin5="",
    lLhsBin6="", lLhsBin7="";
    String lTopBin="", lBottomBin="";
//?
    /* Welcome Bin */
    if(IBEUtil.useFeature("IBE_USE_WELCOME_BIN"))
    {
        welcomePage =
            DisplayManager.getTemplate("STORE_CUST_ACC_WELCOME").
            getFileName();
        if (welcomePage == null)
            welcomePage = "";
    }
//?
<%-- welcome bin -----%>
<%
    if(!welcomePage.equals(""))
    {
        IBEUtil.log(JSP_PAGE_NAME, "PERF: begin include welcome page");
        IBEUtil.log(JSP_PAGE_NAME, welcomePage);
    }
%>
    <jsp:include page="<%=welcomePage%" flush="true" /><br>

```

```
<%  
  }  
  IBEUtil.log(JSP_PAGE_NAME, "PERF: end include welcome page");  
  }  
  //?  
  %>  
<!-- ibeCCtdCmnSt.jsp end -->
```

Post-Setup and Testing

After your customization, complete the following post-setup & testing steps:

1. Map your ESI bin page and ESI container page properly. Refer to the "Implementing the Catalog" chapter for more information.
2. Test your pages when Oracle Application Server Web Cache 10g is not present.
3. Test your pages when Oracle Application Server Web Cache 10g is enabled and the ESI bin is included in an ESI container page. (Skip this step if this scenario doesn't apply to your implementation.)
4. Test your customized pages when Oracle Application Server Web Cache 10g is enabled and the ESI bin is included in a non-ESI container page. (Skip this step if this scenario doesn't apply to your implementation.)

Dynamic Page Cacheability for Section Configurable Layout

Oracle iStore enables you to dynamically set cacheability rules at runtime, by allowing a web-cacheable container page (the default Configurable Layout JSP, `ibeCCtdCmnSctLayout.jsp`) to change the cacheability of itself at runtime. This feature is available by default when you use Configurable Layout in your specialty sites. Configurable Layout uses `ibeCCtdCmnSctLayout.jsp`, which checks the cacheability of each included bin and then either caches the entire page content or not.

Dynamic Page Cacheability Functional Flow

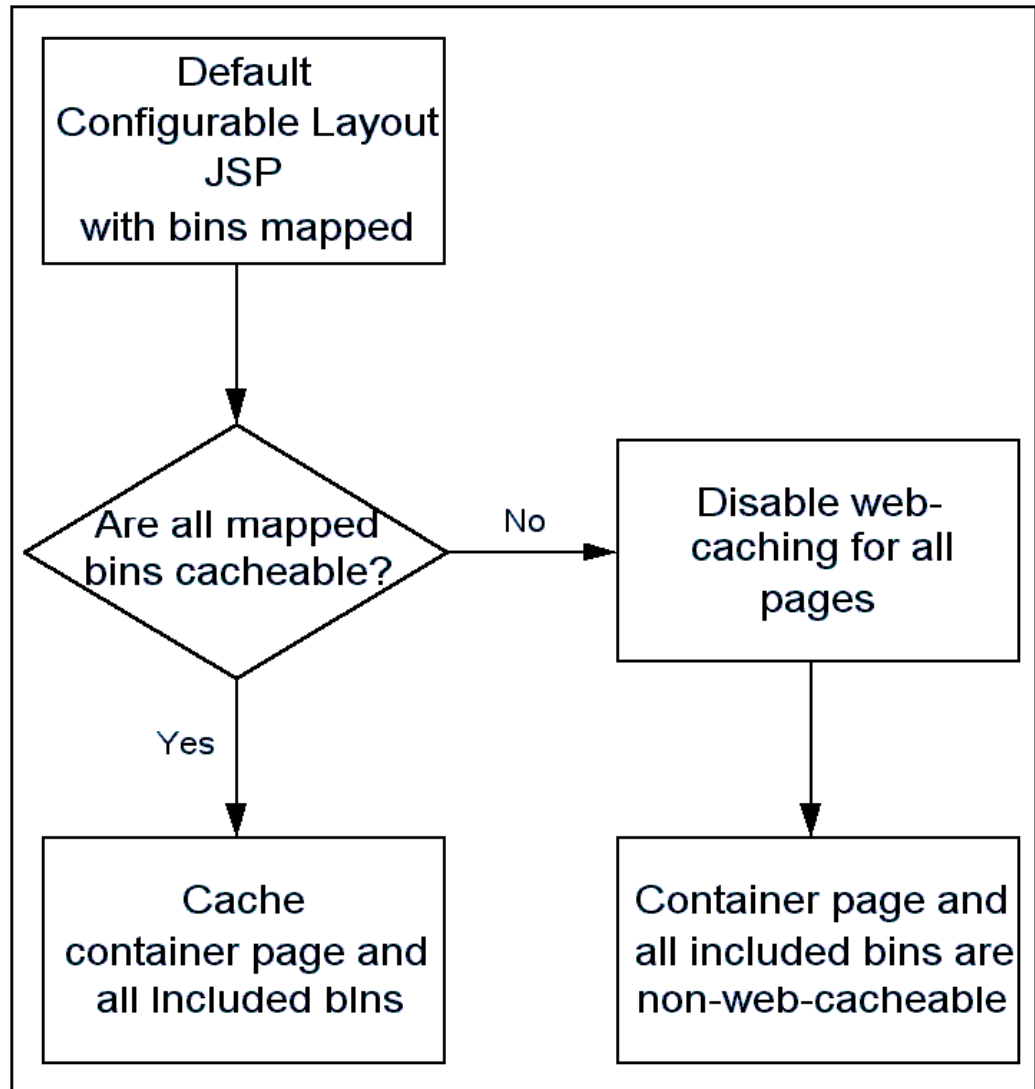
The following functional flow can aid your understanding of this feature.

1. Implementer maps content to appropriate bins and then configures the layout of the bins using Configurable Layout (see the "Implementing the Catalog" chapter).
2. At runtime, the default Configurable Layout JSP, `ibeCCtdCmnSctLayout.jsp` (seeded for `STORE_SCT_CONFIGURABLE_LAYOUT` template, a container page), checks the cacheability of each of the bins mapped.

3. If all bins on the page are cacheable, the container page caches all bins.
4. If the page recognizes a bin as non-web-cacheable, the container page makes itself (and all mapped bins) non-web-cacheable. How the page does this is examined in the next section.

The following graphic depicts the flow.

Dynamic Page Cacheability Functional Flow



Implementing Dynamic Page Cacheability

By default, when it finds a bin that is non-web-cacheable, the seeded Configurable Layout JSP overwrites existing cacheability rules and disables the web-cacheability of the itself and all mapped bins. If you are using seeded bins and the Configurable Layout option for sections, there are no implementation steps other than to map the bins (see the "Implementing the Catalog" chapter).

The seeded Configurable Layout JSP determines if a bin is web-cacheable by checking the programmatic access name of the bin template. If the access name ends with `_IBEWC`, the bin is not web-cacheable. Therefore, when using seeded or custom bins in Configurable Layout, consider the access name of each bin template.

How Configurable Layout JSP Disables Web-Cacheability

The process that the seeded Configurable Layout JSP page follows for disabling its own web-cacheability is:

1. The Configurable Layout JSP sets the `webcache` attribute to `disable` in the `pageContext`, and then includes the JSP, `ibeCWcpHeader.jsp`.
2. `ibeCWcpHeader.jsp` checks the `webcache` attribute value. If the value is `disable`, `ibeCWcpHeader.jsp` sets the Surrogate Control attribute of the HTTP response header to "no-store".

Cacheing Custom Bins with Configurable Layout

If using custom bins with Configurable Layout and you wish the bin content to be cacheable, ensure that programmatic access names do not end with `_IBEWC`. If the content of a bin is non-web-cacheable, and the bin does not support partial web cache, its access name should end with `_IBEWC`.

Code Example for Dynamic Page Cacheability

The following is an example of how the JSP code might look with this feature:

```
<% //check the web cacheability of each included bin, find at
least one of them is not web cacheable, then
pageContext.setAttribute("webcache", "disable", PageContext.
REQUEST_SCOPE); %>
<%@ include file="ibeCWcpHeader.jsp" %>
```

Integrating Oracle iStore with Oracle Workflow

This chapter covers the following topics:

- Integrating Oracle iStore with Oracle Workflow
- Overview of Oracle Workflow
- Oracle iStore Functionality with Oracle Workflow
- Setting up Oracle iStore to Use Oracle Workflow Notifications
- Customizing Oracle iStore-Oracle Workflow Integration

Integrating Oracle iStore with Oracle Workflow

This chapter describes the integration of Oracle iStore with Oracle Workflow to provide e-mail notifications of Customer UI events and Site Administration business reports.

Overview of Oracle Workflow

Business processes today involve getting many types of information to multiple people according to rules that are constantly changing. An integral part of Oracle Applications, Oracle Workflow lets you automate and continuously improve business processes, routing information of any type to people both inside and outside your enterprise according to business rules that you can easily change. Oracle Workflow does this by enabling e-mail notifications based on business event triggers.

For more information on Oracle Workflow, see the *Oracle Workflow Guide*.

Oracle iStore Functionality with Oracle Workflow

Oracle iStore provides seeded workflows in which there are predefined notifications and notification messages. In Oracle Workflow, the workflow that contains Oracle

iStore notification workflows is the iStore Alert Workflow (IBEALERT).

Oracle iStore supports sending Oracle Workflow e-mail notifications in HTML and text formats, and seeds the message text for the seeded text format messages. Merchants can enable the HTML notifications at the workflow level based on their business requirements. In the Site Administration UI, merchants can select the HTML messages retrieved from Workflow, and map these to organization, user type, or site.

The notification e-mail messages are sent to users based on various events, including:

- User registration
- Login assistance requested
- Orders placed, cancelled, or returned
- Shared shopping cart actions
- Sales assistance requested
- Contracts actions

Notifications can be triggered by a site user (e.g., registration) or by the application itself (e.g., when an update message is scheduled for delivery). The e-mail messages include attributes (also called *tokens*) that are dynamically replaced with user-specific values -- such as the user's name -- when an e-mail is sent.

Notification events and messages are stored in Oracle Workflow data tables.

You can choose to use only the seeded messages for notifications. You can also create new messages using Oracle Workflow Builder. See the section, "Customizing Oracle iStore-Oracle Workflow Integration", below, for more information.

After you have the messages that you need, you can use the default configurations of ALL users, ALL sites, and ALL organization, or you can select messages for notification events based on site, organization, or user type combinations, using the Oracle iStore Site Administration UI. See the section, "Mapping New Notification Configurations", for details.

Notifications Business Flow

The business flow of a typical notification event is:

1. Notification event occurs. (e.g., a user registers or requests to share a cart).
2. Oracle iStore selects the message for the notification, in some cases based on the recipient's organization and user type. (These are configurable parameters -- see the section, "Mapping New Notification Configurations", below.)
3. Oracle Workflow parses the message.

4. Oracle Workflow enters dynamic content into e-mail.
5. Oracle Workflow sends the message to the e-mail address of the user(s) involved in the event.

Note: Users must have a valid e-mail address stored in their registration data for the e-mail notifications to reach them.

Oracle iStore Notifications

Oracle iStore comes with seeded (supplied) Oracle Workflow notification events and messages. These are described below.

Notification Events Related to Orders

Following are the order-related notification events:

- Order Confirmation - Normal
- Order Confirmation - Next steps for faxed orders
- Orders Not Booked Notification
- Cancel Order
- Return Order Confirmation
- Return Order Approval Notification
- Return Order Rejection Notification

Notification Events Related to Shopping Cart/Quote Sharing

Following are the cart/quote sharing-related notification events:

- Generic Notification for Shared Carts
- Shared Cart Notification
- Shared Quote Notification
- Change Access Level by Cart Owner
- Change Access Level by Quote Owner
- Remove Cart Access by Recipient
- Remove Quote Access by Recipient

- Stop Sharing by Cart Owner
- Stop Sharing by Quote Owner

Notification Events Related to Sales Assistance

Following are the sales assistance-related notification events:

- Sales Assistance Request - To Sales Representatives
- Sales Assistance Request - To Users

Notification Events Related to Users and Registration

Following are the user management-related notification events:

- User Registration
- Forget Login

See also: "Other Supported Notification Events for User Management"

Notification Events Related to Contracts

Following are the contracts-related notification events:

- Contract Negotiations Request - Approval
- Contract Negotiations Request - Cancellation
- Contract Negotiations Request - Disapproval
- Contract Negotiations Request - To Users
- Contract Negotiations Request - To Sales Representatives

List of Seeded Oracle iStore Notification Events

The following table describes the seeded Oracle iStore notification events. The table also lists their triggers and seeded recipients.

Oracle iStore Seeded Notification Events

Notification Name	Description	Recipients	Trigger
Notification Events Related to Orders			

Notification Name	Description	Recipients	Trigger
Order Confirmation - Normal	Confirms a normal order	User who places the order	User places an order in a web specialty site.
Order Confirmation - Next steps for faxed orders	Explains the remaining steps for order submission	User who places the order	User places an order and chooses to fax a credit card or purchase order as payment.
Orders Not Booked Notification	Announces that an order has not been booked.	Order administrator (profile option IBE: Order Administrator for Booking Issues.)	User's order is not booked.
Cancel Order	Confirms cancelled order	User who cancels order	User cancels order using the web specialty site.
Return Order Confirmation	Confirms submitted return	User who submits return order request	User submits return order.
Return Order Approval Notification	Notifies of approved return. You can customize the message content to specify the return location where the company would like the return items to be shipped by the end customer.	User who submits return order request	User submits return order and it is approved.
Return Order Rejection Notification	Notifies of rejected return	User who submits return order request	User submits return order and it is rejected.
Order Administrator for Partner Orders	Used to send notification by Partner and Partner Primary Users	Order Administrator for Partner Orders (profile IBE: Order Administrator)	Partner user's order is not booked.

Notification Name	Description	Recipients	Trigger
Notification Events Related to Shared Shopping Carts			
Generic Notification for Shared Carts	Notifies existing members (whose role did not get updated) and the owner (unless the owner initiated the action); contains a URL which takes members to shared cart	All existing members specified during sharing (Notify checkbox checked for these members) Owner or administrator, when requesting sales assistance Owner receives this notification when someone other than him (an administrator) requests sales assistance	User shares a cart or adds new members to an existing shared cart; or when owner or administrator requests sales assistance
Shared Cart Notification	Confirms new shared cart (or re-shared cart) event and explains how to access shared cart	Shared cart members (contains two messages -- one for B2B users, one for B2C users) Owner gets Generic Notification when an administrator re-shares a cart	User shares a cart; or, a user re-shares a cart
Shared Quote Notification	Confirms shared (or re-shared) quote event and explains how to access shared quote	Shared quote members (contains two messages -- one for B2B users, one for B2C users) Owner gets Generic Notification when an administrator re-shares a quote	User shares a quote; or, a user re-shares a quote

Notification Name	Description	Recipients	Trigger
Change Access Level by Cart Owner	Notifies users about access level changes	Shared cart members whose roles have changed Members get a Generic Notification if their access level is not changed Owner gets Generic Notification when an administrator changes the access level of members	Shared cart owner/administrator changes access level of member
Change Access Level by Quote Owner	Notifies users about access level changes	Shared quote members whose role has changed	Shared quote owner/administrator changes access level of member
Remove Cart Access by Recipient	Notifies users about shared cart status	Shared cart owner (members receive Generic Notification)	Shared cart recipient removes his own access to a shared cart
Remove Quote Access by Recipient	Notifies users about shared quote status	Shared quote owner (members receive Generic Notification)	Shared quote recipient removes his own access to a shared quote.
Stop Sharing by Cart Owner	Notifies users that a shared cart has been un-shared by the owner or administrator	Shared cart recipients	Shared cart owner /administrator stops sharing a shared cart.
Stop Sharing by Quote Owner	Notifies users that a shared quote has been un-shared by the owner or administrator	Shared quote recipients	Shared quote owner /administrator stops sharing a shared quote.
Notification Events Related to Sales Assistance			

Notification Name	Description	Recipients	Trigger
Sales Assistance Request - To Sales Representatives	Describes a request for sales assistance	<p>For shopping carts: The sales representative specified in the quote header's resource ID</p> <p>For published quotes: The sales representative who is the quote's primary sales agent.</p>	User requests sales assistance.
Sales Assistance Request - To Users	Acknowledges a request for sales assistance	User	User requests sales assistance.
Notification Events Related to Users and Registration			

Notification Name	Description	Recipients	Trigger
User Registration	Welcomes a newly registered user after approval	<p>User; contains several messages:</p> <ul style="list-style-type: none"> B2C user, standard registration B2C user, Need Online Access registration B2B non-administrative user, standard registration B2B non-administrative user, Need Online Access registration B2B primary (administrative) user, standard registration Online Access to Existing Account B2C user Online Access to Existing Account B2B user Partner non-administrative user, standard registration Partner primary (administrative) user, standard registration 	B2C user registers, B2B regular user registers and is approved, B2B primary user registers

Notification Name	Description	Recipients	Trigger
		Note that the notifications Online Access to Existing Account functionality display as "Individual Partial" and "Business Partial" in the Site Administration UI.	
Forget Login	Tells user his username and password	User	Registered user requests login information.
Notification Events Related to Contracts			
Contract Negotiations Request - Disapproval	Announces rejection of a contract terms change request	Contract sales representative for the user's operating unit	Contract administrator rejects user's request for changes in contract terms.
Contract Negotiations Request - To Sales Representatives	Describes a request for changes to contract terms	Contract sales representative for the user's operating unit	User requests changes in contract terms.
Contract Negotiations Request - Approval	Announces approval of a contract terms change request	User Contract sales representative for the user's operating unit	Contract administrator approves user's request for changes in contract terms.
Contract Negotiations Request - Cancellation	Announces cancellation of contract negotiations	User Contract sales representative for the user's operating unit	Contract administrator cancels contract that was created when a user requested changes in contract terms.
Contract Negotiations Request - To Users	Acknowledges a request for changes to contract terms	User	User requests changes in contract terms.

Other Supported Notification Events for User Management

The following notifications events which use Oracle CRM user management workflows are supported when users register through Oracle iStore:

- Notify Users of Pending Approval
- Notify Users of Approval
- Approved User
- Rejected User
- Request of enrollment approval
- Request of registration approval
- Enrollment approved
- Enrollment rejected
- Remind of user type approval request
- Remind of enrollment request

See the section, "Oracle iStore Seeded Notifications", for the user management notifications owned by Oracle iStore. See the *Oracle CRM System Administrator's Guide* for information about Oracle CRM user management notifications.

Notifications Sent Based on Registration Type

The following table shows the e-mail notification sent based on which user type the user selects during registration. For more information on user types, see the chapter, *Implementing User Management*, page 14-1.

Notifications Sent Based on Registration Type

Registration Type	iStore Welcome Notification	JTF Welcome Notification	JTF Approval Pending Request Notification to Approvers	JTF Registration Approved Notification	JTF Registration Rejected Notification
iStore/Partner Management Registration	Yes	No	Yes	Yes	Yes
iStore/Partner Management Partial Registration	Yes; but without password	No	Yes	Yes	Yes
iSupport Registration (where, app_id parameter is provided)	No	Yes	Yes	Yes	Yes

Setting up Oracle iStore to Use Oracle Workflow Notifications

This chapter is limited to information specific to implementing Oracle iStore's Oracle Workflow notification events. For further details, please refer to the *Oracle Workflow Guide*.

Limited information about customizing notifications is also presented here, in the section, "Customizing Oracle iStore-Oracle Workflow Integration".

Setting up Oracle iStore to Use Workflow Notifications - Required Steps

iStore merchants can set the default email notification style that the iStore B2B and B2C users will receive upon registration. iStore merchants should set the IBE: Default User Email Style profile option to the preferred email notification style as a default value. The following list of email styles can be chosen:

- HTML mail
- HTML mail with attachments

- Plain text mail
- Plain text mail with HTML attachments

Upon receiving registration confirmations, new iStore B2B and B2C users can access their iStore profiles and set the default email notification style to a preferred value. The iStore merchant has the ability to modify the list of values available for email notification styles. For example, if the email notification style for HTML mail with attachments style is not applicable, then the selection can be removed from the list of available email notification styles.

In addition to the Oracle-Workflow-specific setups documented in the *Oracle Workflow Guide*, you must set the profile option, HZ: Raise API Events (previously named HZ: Execute API Callouts), to Only Granular (V2) Events Enabled, in order to synchronize Oracle TCA data with Oracle Workflow user data. If this profile is not enabled, Workflow will not have required user details, and notifications -- even though generated -- will not be sent. See the Oracle TCA documentation for additional details.

Setting up Oracle iStore to Use Workflow Notifications - Optional Steps

iStore B2B and B2C users can enter or change their addresses (Address Book link), email addresses (Email Addresses link), and phone numbers (Phone Book link) available in their iStore profiles. Within the Email Addresses link, B2B and B2C users can select the primary email style to be used when they receive notifications. iStore B2B and B2C users can choose from a list of email styles, see the section, Setting up Oracle iStore to Use Workflow Notifications – Required Steps, page 34-12 for more information.

Note: When a new iStore B2B or B2C user is created, their primary email style will be set to the value determined by the IBE: Default User Email Style profile option. The iStore customer can then access the iStore application, navigate to their profile, and change their primary email style in the Email Addresses link to one of the available email styles from the dropdown list.

This section contains optional steps to activate the Oracle Workflow integration with Oracle iStore.

Setting Default Administrator for Orders Errors

To specify a default username to receive a notification each time an error occurs during the ordering process, set the profile option, IBE: Order Administrator for Booking Issues. See the "Profile Options" appendix for more information.

Setting up Sales Representative Recipients

Several Oracle iStore notifications are sent to sales representatives and contract sales representatives. If you are integrating with the Oracle applications whose users are

primarily sales representatives -- including Oracle Sales Contracts, Oracle Sales Online, and Oracle Quoting -- you must specify the sales representatives and contract sales representatives who receive notifications. Refer to the specific product documentation for further details. See the chapter, *Implementing Customer Assistance*, page 15-1, for information about this business flow.

Mapping New Notification Configurations

Oracle iStore ships with the seeded notification events described in earlier in this chapter. For any notification event, if you have not set up a message for a specific site, organization, or user type, Oracle iStore uses the default message, mapped to ALL sites, organizations, or user types.

When mapping new configurations, three parameters can be used to determine the mapping:

- **Site:** The list of values for Site includes all sites in your implementation.
- **Organization:** The organization is determined by the setting of the profile option MO: Operating Unit at the responsibility level to a username. See the chapter, *Implementing Globalization and Multi-Org Architecture*, page 17-1, for more information.
- **User type:** The user type is determined during registration by the Oracle user management framework. Default values are:
 - Register as individual (B2C Individual User)
 - Register your organization (primary B2B user)
 - Register as a user of an existing company (regular B2B user)

If integrating with Oracle Partner Management, you must set up the user types: *Register as a partner* and *Register as a user of an existing partner*. See the chapters, *Integrating Oracle iStore with Oracle Partner Management*, page 27-1, and *Implementing User Management*, page 14-1, for details.

If you wish to send different email text for B2C, B2B and partner party-types, but, the same email notification text regardless of whether the user is a Primary user, regular B2B user or Online Access to Existing Account user, you can map the same message to the IBE_PRIMARY/IBE_BUSINESS/IBE_PARTIAL_BUSINESS user types. Additionally, if you wish to send different notifications for B2B Primary and B2B regular users, you may map the message for both IBE_BUSINESS and IBE_PARTIAL_BUSINESS user types, but use a different message for IBE_PRIMARY.

Important: Oracle iStore does not allow customization of notification events. Customers can only customize the notification messages. See the *Oracle Workflow Guide* for details.

The following table shows sample message configurations for the notification Order Confirmation - Normal.

Sample Configurations for the Notification Order Confirmation - Normal

Organization	User Type	Message
All	All	Message 1 (default)
All	Register as a user of an existing company	Message 2
Organization A	All	Message 3
Organization A	Register as individual	Message 4

When Oracle iStore sends a notification, it chooses the message with the parameters that match the user's data most closely, or it selects the default configuration.

For example, with the message configuration listed in the table above, an individual user who places an order against Organization A receives Message 4, not Message 1 or Message 3.

If more than one message applies to the user, the user's organization takes precedence over the user type. For example, with the message configuration listed in the preceding table a business user who places an order against Organization A receives Message 3, not Message 2.

Organization, user type, and site are not relevant to certain notifications. In such cases:

- You cannot map notification configurations for organization, user type, or site.
- Pull-down menus from which you would normally choose organization or user type display as read-only fields.

Oracle iStore Notification Events Configurable Parameters

The following table shows the notification events and their configurable parameters.

Configurable Parameters for Oracle iStore Notification Events

Notification Event	Site	Org.	User Type
Cancel Order	No	Yes	Yes
Change Access Level by Cart Owner	Yes	Yes	Yes

Notification Event	Site	Org.	User Type
Change Access Level by Quote Owner	Yes	Yes	Yes
Contract Negotiations Request - Approval	No	Yes	Yes
Contract Negotiations Request - Cancellation	No	Yes	Yes
Contract Negotiations Request - Disapproval	No	Yes	No
Contract Negotiations Request - To Sales Representatives	No	Yes	No
Contract Negotiations Request - To Users	No	Yes	Yes
Forget Login	Yes	Yes	Yes
Order Confirmation - Next steps for faxed orders	No	Yes	Yes
Order Confirmation - Normal	No	Yes	Yes
Orders Not Booked Notification	No	No	No
Remove Cart Access by Recipient	Yes	Yes	Yes
Remove Quote Access by Recipient	Yes	Yes	Yes
Reports - iStore Historical Summary	No	No	No

Notification Event	Site	Org.	User Type
Reports - iStore Top Orders	No	No	No
Return Order Confirmation	Yes	Yes	Yes
Return Order Approval	No	Yes	Yes
Return Order Rejection	No	Yes	Yes
Sales Assistance Request - To Sales Representatives	No	Yes	No
Sales Assistance Request - To Users	No	Yes	Yes
Share Cart Notification	Yes	Yes	Yes
Share Quote Notification	Yes	Yes	Yes
Stop Sharing by Cart Owner	Yes	Yes	Yes
Stop Sharing by Quote Owner	Yes	Yes	Yes
User Registration	No	Yes	Yes

Steps to Map New Configurations

Use the following procedure to add message configurations for notification events according to site, organization, or user type. For a list of seeded notification events, see the section, "Oracle iStore Seeded Notifications".

Prerequisites

- Perform the required tasks in the section, "Setting up Oracle iStore to Use Workflow Notifications - Required Steps", above.

Steps

1. Log in to the Site Administration UI. In the Advanced tab, select the Notifications subtab. The Notification Events page opens with a list of existing Notification Events.
2. Select the Details icon for the notification event that you want to modify or copy. The Notification Event Details page opens, displaying the default, seeded configuration for this notification event and any other configurations that have been created.
 - Optionally, you can remove non-seeded notification configurations
 - Optionally, you can disable/enable a configuration by selecting the notification configuration and selecting the Enable or Disable button.
3. In the Notification Event Details page, select Add Notification Event. In the Add Configuration page, use the lists-of-values to map the notification event at the desired level. The LOVs will only be updateable if the notification event can be mapped at that level.

Customizing Oracle iStore-Oracle Workflow Integration

You can choose to use only the seeded messages for Oracle iStore notifications. If you want to create additional messages, you can use the planning steps below to assist you:

- Decide the number of organizations that you will have.
- Decide what the content of the default messages, if any, should be.
- Decide exactly what combinations of organizations and user types need messages that are different from the defaults.
- Decide what the content of the non-default messages should be.

If you are upgrading Oracle iStore and have customized Workflow messages, then you must do the following:

- Back up any necessary customized messages and remove the access locks from the messages and items of the Oracle iStore-related Oracle Workflow definition, so that the upgrade can overwrite the Oracle Workflow definition. See the chapter, *Diagnostics and Troubleshooting*, page 20-1, for details.

Creating Messages

Use Oracle Workflow Builder to create and edit messages for Oracle iStore notifications. The Oracle Workflow item type iStore Alerts Workflow (IBEALERT), in the data store

file IBENOTIF.wft, contains all Oracle iStore notifications and their messages and attributes, except for the notifications Summary Report and Top N Orders Report. The item type iStore Alert Reports (IBEECRRP), in the data store file IBEVWFR.wft, contains the notifications Historical Summary Report and Top N Orders Report.

Note: Do not modify the seeded messages. Changes to the seeded messages will be overwritten when you apply patches. Instead, copy the seeded messages into new messages, then modify the new messages.

Each message is associated to an internal name and is linked to an Oracle iStore notification event. The following table lists the message prefix for each notification event. See the section, "Oracle iStore Seeded Notifications", above, for descriptions of the notification events.

Seeded Message Template Names for Oracle iStore Notifications

Notification Event	Message Template Name
Cancel Order	CANCELORDER
Change Access Level by Cart Owner	CHANGEACCESSLEVEL
Change Access Level by Quote Owner	CHANGEACCESSLEVEL_QUOTE
Contract Negotiations Request - Approval	TERMAPPROVEDNOTIF
Contract Negotiations Request - Cancellation	TERMCANCELLEDNOTIF
Contract Negotiations Request - Disapproval	TERMREJECTEDNOTIF
Contract Negotiations Request - To Sales Representatives	SALESQUOTENOTIFICATION
Contract Negotiations Request - To Users	CUSTQUOTENOTIFICATION
Forget Login	FORGETLOGINNOTIFICATION
Order Confirmation - Next steps for faxed orders	ORDFAXNOTIFICATION
Order Confirmation - Normal	ORDCONFNOTIFICATION
Orders Not Booked Notification	ORDNOTBOOKEDNOTIFICATION

Notification Event	Message Template Name
Remove Cart Access by Recipient	ENDWORK
Remove Quote Access by Recipient	ENDWORK_QUOTE
Reports - iStore Historical Summary	IBE_ECR_SUMM_ALERT
Reports - iStore Top Orders	IBE_ECR_TOPORD_ALERT
Return Order Confirmation - B2B user	IBE_RETURNORDERCONF_B2B
Return Order Confirmation - B2C user	IBE_RETURNORDERCONF
Return Order Approval	IBE_RETURNORDERAPPROVED
Return Order Rejection	IBE_RETURNORDERREJECT
Sales Assistance Request - To Sales Representatives	SALESASSISTNOTIFICATION
Sales Assistance Request - To Users	CUSTASSISTNOTIFICATION
Share Cart Notification	SHARECARTNOTIF
Share Quote Notification	SHAREQUOTENOTIF
Stop Sharing by Cart Owner	STOPWORKING
Stop Sharing by Quote Owner	STOPWORKING_QUOTE
User Registration	ACCTREGNOTIFICATION

Oracle Workflow replaces attributes in messages dynamically with user-specific values when it sends a notification. The following table lists the iStore Alerts Workflow attributes.

Attributes for the Item Type iStore Alerts Workflow

Display Name	Internal Name	Description	Type
First Name	FIRSTNAME	User's first name	Text
Last Name	LASTNAME	User's last name	Text
Login Name	LOGINNAME	User's login name	Text
Password	PASSWORD	User's password	Text
Email Address	EMAILADDRESS	User's e-mail address	Text
Event Type	EVENTTYPE	Notification event type	Text
Send To	SENDTO	Recipient's e-mail address	Text
Quote Id	QUOTEID	Quote ID	Number
Quote Name	QUOTENAME	Quote name	Text
Quote Detail with tax	QUOTEDETAILWITH HTAX	Quote detail with tax information	Document
Quote detail without tax	QUOTEDETAILWITHOUT TAX	For quote line details with tax info	Document
Contract Number	CONTRACTNO	Contract number	Number
Order Detail	ORDERDETAIL	Order detail	Document
Order Detail without tax	ORDERDETAILWITHOUT TAX	Order detail without tax	Document
Order Detail with tax	ORDERDETAILWITH TAX	For order detail with line level tax info	Document
Order Header	ORDERHEADER	Order header	Document
Order Footer	ORDERFOOTER	Order footer	Document

Display Name	Internal Name	Description	Type
Error Message	ERRMSG	Error message	Text
Comments	COMMENTS	User's comments	Text
Order Header ID	ORDERID	Order header ID	Number
Item Key	ITEMKEY	Item key	Text
Quote Number	QUOTENUM	Quote number	Number
Cart Version	QUOTEVER	Cart version/quote version	Number
URL	URL	URL (e.g., a shared cart link)	Text
Sharee Number	SHNUM	Shared cart recipient number	Text
Message Name	MESSAGE	Message name	Text
Requester Name	REQ_NAME	Requester name	Text
Requester First Name	REQ_F_NAME	Requester first name	Text
Requester Last Name	REQ_L_NAME	Requester last name	Text
Person Title	PERSON_TITLE	Person title	Text
Contact Phone	CONTACTPHONE	Contact phone	Text
Cart Name	CARTNAME	Cart name	Text
Cart Date	CARTDATE	Cart date	Text
Ship Method	SHIPMETHOD	Ship method	Text
Ship-to Name	SHIPTONAME	Ship-to name	Text
Ship-to Address	SHIPTOADDRESS	Ship-to address	Text

Display Name	Internal Name	Description	Type
Specialty Store Name	MSITENAME	Specialty site name	Text
Reason	REASON	Reason code for sales assistance request	Text
Order Number	ORDERNUMBER	Order number	Text
Contact Name	CONTACTNAME	Contact name	Text
Context Message	CONTEXT_MESSAGE	Context Message	Text
Access Level	ACCESSLEVEL	Access Level	Text
Old Access Level	OLDACCESSLEVEL	Old Access Level	Text
Update Message	UPDATEMSG	Update Message	Text
Retrieve Message	RETRIEVEMSG	Retrieve Message	Text
Order Detail Header	ORDERDTLHEADER	Order Detail Header	Document
Permission to view net price	VIEWNETPRICE	Permission to view net price	Text
Store User Type	STOREUSERTYPE	Store User Type	Text

The item type iStore Alert Reports has a different set of attributes, listed in the following table.

Attributes for the Item Type iStore Alert Reports

Display Name	Internal Name	Description	Type
Report Frequency	FREQUENCY	Report frequency, e.g., DAY, MONTH	Text
Report Scale	SCALE	Report amount scale	Number

Display Name	Internal Name	Description	Type
Currency Code	CURRENCY	Currency code	Text
Number of Rows	NUMROW	Number of rows	Number
Report Subject	REPORT_SUBJECT	Report subject	Text
Document Identifier	DOCUMENTID	Document identifier	Text
Report Body	REPORT_BODY	Report body	Text
Bin Refresh Date	BIN_DATE	Bin refresh end date	Text
Table of Contents	TOC	Table Of Contents	Document
Request Server	REQ_SERVER	Request Server URL	Document
Style Sheet	STYLE_SHEET	Style Sheet for Alert Reports	Document
Day Reports	REPORT_DAY_BODY	Day Reports	Document
iStore Shopping Cart Summary	IBE_ECR_BIN_SUMM_CARTS	iStore Shopping Cart Summary	Document
Global Week Detail Reports	REPORT_WEEK_BODY	Global Week Detail Reports	Document
Global Month Detail Reports	REPORT_MONTH_BODY	Global Month Detail Reports	Document
Global Quarter Detail Reports	REPORT_QUARTER_BODY	Global Quarter Detail Reports	Document
Global Year Detail Reports	REPORT_YEAR_BODY	Global Year Detail Reports	Document

Use the following procedure to create customized Oracle Workflow messages for the Oracle iStore notifications.

Steps

1. Create a new message using Oracle Workflow Builder, and name it with the appropriate prefix for the notification event, as listed in above table.
2. Copy the message attributes from the seeded message for the notification event to the new message.
3. Modify the message text as necessary.
4. Restart the Java Virtual Machine (JVM) to refresh the cache objects.
5. You can now map this message to its notification by organization and user type. See the section, "Mapping New Notification Configurations", above, for more information.

See *Oracle Workflow Guide* for more information on working with messages.

Concurrent Programs

This chapter covers the following topics:

- Overview of Oracle Applications Concurrent Programs
- Overview of Oracle iStore Concurrent Programs
- Search Functions Concurrent Programs
- Duplicate Section Concurrent Programs
- Order Submission Concurrent Program
- Template Mappings Import/Export Concurrent Programs
- iStore Lead Import Concurrent Program Set
- iStore Product Autoplacement
- iStore Oracle Content Manager Integration Migration
- Oracle Marketing Integration Concurrent Program
- Oracle Payments Integration Concurrent Program
- Running Concurrent Programs
- Checking Concurrent Program Status

Overview of Oracle Applications Concurrent Programs

In Oracle Applications, concurrent programs are system batch jobs that retrieve and push data between Oracle applications and the database. Concurrent programs can be comprised of a single request or a request set containing more than one concurrent program. Concurrent programs usually have logs associated with them that provide details of the concurrent program data.

When to Schedule Oracle Applications Concurrent Programs

You can set up and start using Oracle Applications concurrent programs at any time in

your implementation. Programs can be set to run on a schedule or only upon user request. For more complete information on Oracle Applications concurrent programs, see *Oracle E-Business Suite Setup Guide*.

When to Schedule Programs - Oracle iStore Specifically

See the detail descriptions of the iStore concurrent programs. For a summary of the programs available, see: the section, "Overview of Oracle iStore Concurrent Programs", below.

Steps to Run Concurrent Programs

See the section, "Running Concurrent Programs", below, for quick-steps.

See *Oracle E-Business Suite Setup Guide* for complete details on Oracle Applications concurrent programs.

Overview of Oracle iStore Concurrent Programs

Several concurrent jobs are seeded in the Oracle Applications (Forms) iStore concurrent program manager setup. These include:

- iStore Search Insert
- iStore Section Search Refresh
- iStore ECC Data Population
- iStore Cascade Section Layout Mapping
- iStore - Express Checkout Order Submission
- iStore Reports Fact Tables Refresh
- Template Mappings Import/Export
- Lead Import Concurrent Program
- iStore Product Autoplacement
- iStore Oracle Content Manager Integration Migration
- Oracle Marketing Integration Concurrent Program

Search Functions Concurrent Programs

The following concurrent programs control the product search functionality.

iStore Search Insert

iStore Search Insert is a single request concurrent program that you execute one time as a post-install step during your Oracle iStore implementation. Run this batch job after you have loaded Oracle Inventory items and set the Inventory organizations. This program populates Oracle iStore's category search table with product information from the Oracle Inventory tables.

Typically, you should not run the iStore Search Insert concurrent program more than once. However, you may need to rerun this program under one of the following three conditions:

- If you add multiple items that do not appear in the search table
- If you want to purge all items from the search table
- If you change the setting of the fuzzy search functionality, by either enabling or disabling it

iStore Section Search Refresh

This concurrent program populates Oracle iStore's section search table with product information.

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

If you have enabled a section-level search, rerun this concurrent program whenever you change the setting of the fuzzy search functionality.

iStore ECC Data Population

Note: To enable the ECC search on the Customer UI for the first time, complete the steps in the previous section, "*iStore Section Search Refresh*", then run this program.

This concurrent program populates Oracle iStore's IBE_ECC_SEARCH_PART_PRICE table, and once it runs the IBE_ECC_SEARCH_V view is updated with the data. Through the full load or incremental load, the data is uploaded into the ECC server. You can then use the ECC search to search on the top of the ibe-search data set, which includes all the data.

Duplicate Section Concurrent Programs

This section lists the concurrent programs that duplicate sections and section layout mappings.

iStore Duplicate Section Concurrent Program

If you need to duplicate a section having more than 1,000 child sections, use the iStore Duplicate Section concurrent program. See the "Creating and Maintaining Sections" section in the chapter, Implementing the Catalog, , page 9-1 for more information.

iStore Section Layout Mapping Concurrent Program

To copy the layout mappings from a parent section to all of the children sections underneath it, use the iStore Section Layout Mapping Concurrent Program. See the "Creating and Maintaining Sections" section in the chapter, Implementing the Catalog, page 9-1, for more information.

Additional Information: This concurrent program only works with sections using Configurable Layout.

Order Submission Concurrent Program

The following concurrent program submits orders for Express Checkout:

iStore - Express Checkout Order Submission

Schedule this program as a batch process that runs at pre-determined intervals. This program converts the Express Checkout shopping carts into orders.

Template Mappings Import/Export Concurrent Programs

Oracle iStore's Display Template Import/Export functionality within Template Manager allows you to export or import template mappings using XML files. The functionality is implemented as two concurrent programs:

- iStore Template Mapping Import Concurrent Program
- iStore Template Mapping Export Concurrent Program

For full details on these concurrent programs, please refer to the Advanced Display chapter.

iStore Lead Import Concurrent Program Set

The concurrent program request set, iStore Lead Import Set, pulls data matching certain parameters into the Oracle Sales leads database table.

The request set contains the following concurrent programs:

- iStore Lead Import Quotes
- iStore Lead Import Orders

For more information, see the chapter, Integrating Oracle iStore with Oracle Sales Applications.

iStore Product Autoplacement

The iStore Autoplacement concurrent program can be used to populate leaf sections with products from Oracle Inventory categories. The program also can remove products from sections that no longer match the criteria of the concurrent program and section-category mappings.

For more information, see the "Implementing Products" chapter.

iStore Oracle Content Manager Integration Migration

Oracle iStore provides a migration script for customers who want to integrate Oracle iStore with Oracle Content Manager (OCM). The script is implemented as a concurrent program, iStore Oracle Content Manager Integration Migration.

Both existing customers and new customers who want to use the OCM integration must run the concurrent program as a mandatory step to migrate the seed and customer data.

See "Integrating Oracle iStore with Oracle Content Manager" chapter for more information.

Oracle Marketing Integration Concurrent Program

If you are integrating Oracle iStore with Oracle Marketing's product screens, you must load the inventory categories information into Oracle Marketing database tables. To do this, run the concurrent program, AMS Load Inventory Categories. After this program is run, the categories information shows up in the Oracle Marketing UI.

See the "Integrating Oracle iStore with Oracle Marketing" chapter, for more information.

Oracle Payments Integration Concurrent Program

At the end of the installation patching process, Oracle Payments automatically runs an

Oracle iStore concurrent program, iStore Program to Migrate Credit Card Data to Oracle Payments. This concurrent program migrates the iStore data for primary and preferred credit card to the Oracle Payments model.

Running Concurrent Programs

Below are instructions for running any Oracle Applications concurrent program or program set. You can use these procedures to run or schedule any of the Oracle iStore concurrent programs.

See *Oracle E-Business Suite Setup Guide* for complete details on Oracle Applications concurrent programs.

Responsibility

- For Oracle Applications concurrent programs in general, it varies by module.
- For Oracle iStore concurrent programs, use iStore Concurrent Programs Responsibility

Steps

1. Log in to Oracle Forms with the appropriate responsibility as described under Responsibility, above. The Submit a New Request form opens.
2. Choose Single Request (to run a single concurrent program) or Request Set (to run a set of concurrent programs).
3. Select OK. The Submit Request form opens.
4. Query for the appropriate concurrent program, if necessary.
5. Select the desired request or request set.
6. Either run immediately or select Schedule to schedule the batch jobs.
7. If scheduling, select the timeframe:
 - As Soon as Possible radio button -- To run the program(s) right away, select this option and then select OK.
 - Once radio button -- To run the program(s) once at a time that you will later specify, select this option and then select OK.
 - Periodically or On Specific Days radio buttons -- To run the program(s) on a schedule that you will later specify, select this option, enter information in the appropriate fields, and then select OK.
8. Select Submit to submit the request. You receive a confirmation that the request has

been submitted.

9. Optional: You can monitor the progress of your request by looking at the request log and output files in `$COMMON_TOP/admin/log/l<request ID>.log` and `$COMMON_TOP/admin/out/<request ID>.out`, respectively.
10. Optional: You can also view the request status by selecting View > Requests and searching by the request ID.

Checking Concurrent Program Status

Use the following procedure to check the status of a concurrent program.

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Choose Concurrent > Requests.

The Find Requests window (defaulted to "All My Requests") opens.

1. In the Find Requests window, search for your concurrent program request.
 - If the server is not busy, then selecting Find may be the fastest way to find your request.
 - If your server is busy, it may be better to enter search criteria and look for Specific Requests.
2. The Requests window displays a list of submitted requests. The Oracle iStore concurrent programs should be listed.
3. Click Refresh Data occasionally to check the completion status.
4. Once in the "red" state or Phase = "Completed", the "View Output" and "View Log" buttons will become active if the log and output files have been setup correctly.

Advanced Display

This chapter covers the following topics:

- Overview of Advanced Display Chapter
- Advanced Content Tasks
- Descriptive Flexfield Support
- Display Template Mappings Import and Export
- Advanced Product Relationships Procedures
- Using Display Styles for Default Display
- Deep Linking Support
- Customizing Templates
- Understanding Catalog Flow
- Customizing Section Templates
- Customizing Item Templates
- Customizing the Style Sheet
- Customizing Help
- API Documentation

Overview of Advanced Display Chapter

This chapter contains information on advanced display functionality in Oracle iStore. Also refer to the Oracle Integration Repository.

Advanced Content Tasks

This section contains advanced tasks to assign content (for example, images, HTML files) in your specialty sites.

See the chapter, *Implementing Content*, page 10-1, for an introduction to content components.

Creating New Content Components

After you create a new content component, you must customize the JSP where it will appear.

To create a new content component, log in to the Site Administration UI and select *Advanced, Content Components, Create Content Component*.

Guidelines

Keep in mind the following guidelines:

- **Component Name field** --- This name will not appear in the Customer UI.
- **Programmatic Access Name field** --- Enter a unique value in the textbox. This will be the value you enter into the JSP call to the content component. An error message will display if you do not enter a unique name.
- **Description field** --- Optionally, enter a description for the content component. This description will not appear in the Customer UI, and is for your internal business purposes only.
- **Class field** --- Select a class for the content component, based on its display purpose. See the "Implementing Content" chapter for guidelines.
- The **Update Content Component** page contains a **Default** textbox, with a **Content** section below it. Since this is a new content component with no content mapped, then no information will display in the **Content** area. After you map content to the media object associated with the content component, the **Content** area will be populated, and the **View Mapping** and **Add Content** buttons will be active.
- After creating the content component:
 - Map a media object to the content component
 - Map content to the media object,
 - Create and register a new **Display Template** (see the sections later in this chapter: "Creating New Templates" and "Registering New Templates in the Template Manager")
 - In the newly created **Display Template**, enter the programmatic access name of the new content component in the **Display Manager API**.

Assigning Media Objects to Content Components at the Site Level

This section contains information on assigning media objects to content components at the site level. For an overview of media objects in Oracle iStore, see the chapter, *Implementing Content*, page 10-1. You can assign content components to media objects at the Product or Section levels as well (see the section, "Creating and Maintaining Sections", in the chapter, *Implementing the Catalog*, page 9-1).

To assign a media object to a content component at site level, log in to the Site Administration UI and select *Advanced, Content Components, Update*.

Guidelines

Keep in mind the following guidelines:

- You can enter partial values in the Default textbox in the Update Content Component page to narrow the results that are returned in the Search and Select: Media Object page when you select the flashlight icon; text entered should be based on media object name.
- If you haven't done so already, after assigning the media object to the content component, map the media object you have selected to a source file or files. You can map content to media objects using the following navigation paths:
 - Content, Media Objects
 - Catalog, Sections, Content
 - Catalog, Products, Content

Descriptive Flexfield Support

Descriptive flexfields (DFFs) allow users to extend Oracle applications to meet business requirements without the need for programming. You can use descriptive flexfields in the Oracle iStore Customer UI to gather information, important and unique to your business, that would not otherwise be captured.

Note that this document contains DFF setup and user information related directly to Oracle iStore. For complete details about flexfields, see the *Oracle E-Business Suite Flexfields Guide*.

Overview of DFFs in Oracle iStore

Oracle iStore merchants can capture information from customers in the shopping cart pages by setting up Oracle Order Capture DFFs. Two of Oracle iStore's product detail templates also support Oracle Inventory DFFs. After you set up DFFs in Oracle Forms, Oracle iStore uses its own JSPs --- along with Oracle CRM Technology Foundation APIs

and renderers --- to display the fields in the UI. Merchants can utilize Oracle Order Capture DFFs to capture information that cannot be captured through defined order attributes. The information passes into the Oracle Order Management system and is viewable in the sales order forms when Order Management DFFs are enabled.

Following are the supported Customer UI areas for using DFFs:

- In the Shopping Cart page, an action entitled *Additional Information* allows customers to populate Order Capture DFFs at the cart and item levels.
- Three product Display Templates support the use of Inventory DFFs. With this option, the Display Templates display the prompt and the value of descriptive flexfield global segments, if a value is defined for the item.

Use Case Examples

The following use case examples can aid your understanding of the functionality:

- Use DFFs in the shopping cart to allow customers to enter gift wrapping requests for a product, such as gift wrap colors and greetings to be shipped with the product.
- Set up a DFF that allows customers to enter a preferred sales representative name; the order administrator could use the information to assign the correct sales representative.
- Implement DFF fields that allow customers to enter optional information that could be used for marketing additional services to them.
- Set up DFFs for product detail templates that allow users to enter additional information for a particular product, such as entering sizes or colors for a shirt.

DFF Process Flows

The process flows in this section depict how customers enter, edit, and remove cart-level and item-level DFF information.

Flow for Entering Cart-Level Information from Shopping Cart Page

Following is the flow:

1. A user visits a site and adds one or more items to the shopping cart.
2. The user selects the Additional Information action in the Shopping Cart page and presses the Go button.
3. In the Cart Additional Information area of the Additional Information page, the user enters relevant data in the DFF fields. The user will be required to enter

appropriate information in fields that the merchant has marked as required in the Oracle Forms setup screens. These fields will display an asterisk (*) next to them.

4. The user saves the data.
5. The user presses the Return to Shopping Cart button to return to the cart.

The following figure shows an example of how the Cart Information page might look in an implementation of Oracle iStore. Since the information is being entered at the cart level, no item information displays. In this example, Cart Additional Information displays at the top of the screen. The entry fields are: Reseller Name (showing the search flashlight icon next to it), Reseller Phone, and Reseller Contact, with values entered for each one. Buttons near the top of the screen are: Save and Clear. In the lower portion of the screen, the Item Additional Information area displays; under this area is a list of items, Wireless Service, Headset, and Envoy Deluxe Laptop. To the far right of each item, is an Item Information icon allowing customer to access the Enter Item Information page. At the top of the list of items is a button, Select Items and., with the buttons Enter Information and Clear next to it. At the bottom of the screen is a button, Return to Shopping Cart.

Cart Additional Information Page Example

Additional Information Back To Shopping Cart

Cart Additional Information Save Clear

* Indicates required fields

Reseller <input type="text" value="Business World"/>	Reseller Contact <input type="text" value="Robert Carini"/>
Reseller Phone <input type="text" value="650.506.0914"/>	Reseller Address <input type="text"/>
Consulting Partner <input type="text" value="Vision Consulting Services"/>	Consulting Partner Contact <input type="text" value="Ted Smith"/>
Consulting Partner Phone <input type="text" value="650.506.3445"/>	Consulting Partner Address <input type="text"/>
Context Value <input type="text" value="DIRECT"/>	Additional Information <input type="text"/>

Select Context Value and click 'Go' to show relevant fields.

Item Additional Information

Select Item(s) and... Enter Information Clear

Select All | Select None

Select	Part Number	Item Name	UOM	Quantity	Item Information
<input type="checkbox"/>	CM76845	Lightning Laser Printer	Each	1	
<input type="checkbox"/>	AT23808	Envoy Ambassador Laptop	Each	1	
<input type="checkbox"/>	CM31556	Monitor - 19" Flat	Each	1	
<input type="checkbox"/>	CMS1565	Gladiator Leather PC Bag	Each	1	

Back To Shopping Cart

Flow for Entering Item-Level Information from Shopping Cart Page

Following is the flow:

1. A user visits a site and adds one or more items to the shopping cart.
2. The user selects the Additional Information action in the Shopping Cart page and presses Go.
3. From the Item Additional Information area of the Additional Information page, the user selects an Item Information icon to access the Item Additional Information page for that item.
4. In the Item Additional Information page, the user enters the DFF information and saves the data. Required fields are marked with an asterisk.

The following figure shows an example of how the Enter Item Information page might look in an implementation of Oracle iStore. In this example, the title, Enter Item Information displays at the top of the page. The DFF values the user can enter are: Support Contract Number and Context Value (with a search flashlight icon next to it). The buttons, Cancel and Apply, appear on the screen.

Enter Item Information Page Example

Enter Item Information

* Indicates required fields

Chassis Style	Desktop Standard	Chassis Color	Black
Mousepad Style	Classic	Mouse Alignment	Centered
Operating System	Mac OS 10	Voltage	N/A
End Customer Name	Business World	End Customer Contact	Robert Carini
Contact Phone Number	650.506.0914	Install At location	Headquarters
Context Value	<input type="text"/>		

Select Context Value and click 'Go' to show relevant fields.

Flow for Editing or Replacing Information from Shopping Cart Page

Prerequisite: A user has already created a shopping cart and has added DFF information for an item at item or cart level.

1. A user activates a shopping cart to retrieve the Shopping Cart page.
2. The user selects the Additional Information action in the Shopping Cart page and selects Go.
3. To replace cart-level information, the user enters/overwrites the information in the Cart Additional Information area of the Additional Information page and saves the data.
4. To replace item-level information, the user selects the appropriate Item Information

icon for the item he wishes to update and then enters new data in the fields in the Item Additional Information page, saving the data when he is finished.

Behavior and Guidelines for DFFs

The following points describe Oracle iStore guidelines and behavior for DFF implementations.

Shopping Cart and Payment Pages DFFs:

- In the shopping cart pages, Oracle iStore has implemented Oracle Order Capture's Header: Additional Information DFF at the cart-level. The DFF segment values are stored in the ASO_QUOTE_HEADERS_ALL table. Similarly, in the shopping cart page, Oracle iStore has implemented Oracle Order Capture's Lines: Additional Information DFF at the cart line-level. These DFF segment values are stored in ASO_QUOTE_LINES_ALL table.
- Oracle iStore provides the flexibility to implement DFF either at the cart-level or cart item-level, or both. In addition, site DFF implementation can be further controlled at the site and specialty store language levels.
- Oracle iStore supports both global and context flexfield segments at the cart and item levels in the shopping cart. However, it does not provide any API-level validation to enforce mandatory segments, for either of these levels, during order placement. However, API-level validation can be indirectly enforced by setting up mandatory DFF segments in Oracle Order Management's DFF.
- If cart-level and item-level flexfields have been implemented in Oracle Order Capture, and if the values entered by the end-user need to be available on the order after the cart is converted to an order, then the implementer must set up the Oracle Order Management flexfields at the order header-level and line-level -- these must exactly match the Oracle Order Capture flexfields. The corresponding Oracle Order Management flexfields are: Additional Header Information (OE_ORDER_HEADERS_ALL table) and Additional Line Attribute Information (OE_ORDER_LINES_ALL table).
 - **Caution:** DFF values are always passed to Oracle Order Management DFF segments. Hence, if the Order Capture DFFs are not identical to the Order Management DFF setups, and if the same database column is used for a different usage, then the data will be visually misleading. Further, if Order Management DFF segments have validations set up, then the Order placement through Oracle iStore may fail.
- Any default values defined for flexfield segments will be shown in Oracle iStore, provided the user had not previously entered values for any of the flexfield segments. Also, Oracle iStore supports default value setup for the DFF Context field, in which case, the context segments for this context are automatically

rendered.

- Oracle iStore does not support "reference field" setup for a DFF context field.
- Cart-level or item-level DFF information is not carried to a shopping list if the cart is saved as a list.
- Oracle iStore automatically saves cart- and item-level DFF information whenever a user saves or shares a shopping cart/quote.
- The shopping cart is re-priced when cart or item level DFF information is saved.
- For cart-level or item-level DFFs, if mandatory global/context segments have been set up, these mandatory segment validations are not enforced when the user selects Express Checkout in the Shopping Cart page.
- In some cases, item-level DFF information may not be captured during Express Checkout. For example: Assume DFF setup is done for both the Order Capture and Order Management DFFs for item level, with some of the segments as mandatory, and the user did not enter DFF information at item level. In this case, for normal checkout, Order Management would capture it while placing the order. However, if the items are checked out through Express Checkout from the catalog or shopping cart pages, there is no way to capture the required DFF information at item level.
- For configured items, DFF information can only be entered for the parent item. Similarly, for serviceable items with attached services, users can only enter DFF information for the serviceable item, but not for any related services.
- Only Independent, Table, and Dependent valuesets can be used with Oracle iStore.
- For carts/quotes shared with Read-Only or Viewer access, the user cannot view the DFF information at the cart and item levels, as he cannot activate the cart.
- If a customer has ordered multiple quantities of a single item, the items can be split to specify different shipping information for each duplicate item. In such a case, the item level DFF information for the original item is populated in each duplicate item.
- If IBE: Merge Shopping Cart Lines is set to Yes, and if the same item is added more than once, when the item in the cart already has DFF information entered, then the DFF values already entered on the existing item in the cart are preserved.
- No DFF information displays in order tracker.
- If the profile, IBE: Additional Shopping Cart Information, is set to No, or if one of the following two templates is not mapped, then the Additional Information menu will not be available from the Shopping Cart page. The templates are STORE_CART_ADDINFO_HEADER and STORE_CART_ADDINFO_LINE. See the

section, "Implementing DFFs in Oracle iStore", below, for more information.

Product Detail Page DFFs:

1. For the product detail DFFs, Oracle iStore supports DFF segments defined on the Inventory Item table.
2. Only global flexfield segments are supported.
3. Out-of-box, the seeded product templates, Product Detail without Image, Product Detail with Image, and Product Detail with Services show product detail DFFs. See the "Implementing the Catalog" chapter for details about these templates.

Implementing DFFs in Oracle iStore

The sections that follow discuss how to implement DFFs for the Oracle iStore Customer UI.

Oracle Forms DFF Setups

First, create the DFF segments and associated values using Oracle Forms' Descriptive Flexfields forms. Following are high-level steps to help you accomplish the implementation. For complete information, see the *Oracle E-Business Suite Flexfields Guide*.

Important: Be sure to review the guidelines in the section, "Behavior and Guidelines for DFFs", above.

Steps

1. Log in to Oracle Forms with the Application Developer responsibility and choose Flexfield, Descriptive, Segments to open the Descriptive Flexfields Segments window.
2. If setting up shopping cart or payment page DFFs, query for the flexfield with:
 - Application --- Oracle Order Capture
 - Title --- Header: Additional Information or Line: Additional Information, depending upon whether you are implementing cart or item level DFFs
3. If setting up product detail page DFFs, query for the flexfield with:
 - Application --- Oracle Inventory
 - Title --- Items
4. Uncheck the Freeze Flexfield Definition checkbox to allow for changes to the flexfield definition.

5. Set up flexfield segments: Select Segments and then map each segment you wish to use to a column, specified by the names `ATTRIBUTE1` through `ATTRIBUTE20`. This column data (attributes 1-20) corresponds to columns with the same name in the `ASO_QUOTE_HEADERS_ALL` and `ASO_QUOTE_LINES_ALL` tables.

Example: Map "Sales Rep Email" to "ATTRIBUTE1."

1. Once all the changes for DFF are done, check the Freeze Flexfield Definition checkbox to freeze the changes, and select the Save icon. This compiles the flexfield definition in the database.
2. After you have set up the DFFs in Oracle Forms, perform the required Oracle iStore-specific steps, depending upon the type of DFF you are implementing:
 - "Setting up DFFs for Shopping Cart Page"
 - "Setting up DFFs for Product Detail Pages"

Setting up DFFs for Shopping Cart Page

The Additional Information page -- accessible as a hyperlink from the Shopping Cart page -- is used to capture item- and cart-level DFF information.

Use the following steps to set up Shopping Cart page DFFs, after you have performed the required setups in Oracle Forms DFF windows:

Steps

1. Set the profile option, IBE: Additional Shopping Cart Information, to Yes. See the "Profile Options" appendix for more information on the profile option.
2. A site administrator has the flexibility to implement DFFs at cart-level, item-level or both, for each site. For this, two different templates are provided which you can map to display a specific JSP, according to the following instructions:
 - **Cart-Level DFF only** --- Map `STORE_CART_ADDINFO_HEADER` to the `ibeCScdHdrAdditionalInfo.jsp`.
 - **Item-Level DFF only** --- Map `STORE_CART_ADDINFO_LINE` to the `ibeCScdLineAdditionalInfo.jsp`.
 - **Both Cart- and Item-Level DFF** --- Map both templates to the JSPs.

For JSP mapping instructions, see the "Implementing the Catalog" chapter. Remember, with Oracle iStore's template mapping functionality, you can map different JSPs to different site-language combinations.

Important: If the profile option, IBE: Additional Shopping Cart Information, is set to Yes, but the template mapping has not been set up, the Additional Information link will not display in the Shopping Cart page.

Setting up DFFs for Product Detail Pages

Out-of-box, Oracle iStore allows you to use DFF capability in three of the seeded product detail Display Templates -- Product Detail without Image, Product Detail with Image, and Product Detail with Services. See the "Implementing the Catalog" chapter for details about these templates.

If a DFF value is defined for an item, templates mapped at the product level display the prompt and the value of DFF global segments.

Steps

1. To set up flexfield segments and values for products and their detail pages, log into Oracle Forms with Inventory responsibility.
2. Navigate to the Inventory Item window and find the item for which flexfield values will be entered. Use the Inventory Organization that is set in the profile option, IBE: Item Validation Organization.
3. Click on the rectangle enclosed within brackets next to the Description field in the Inventory Item window. A window opens with the flexfield segments set up in the previous steps.
4. Enter values for the flexfield segments you want to display on the item detail page.
5. Reboot the Application server to clear the cache after entering the new data.
6. Add the product(s) to a section, and map one of the product detail templates listed above at the product level. For steps, see the "Implementing the Catalog" chapter.
7. To test, in the Customer UI, navigate to the product(s) detail page. The flexfield segment prompts and values should appear on the item detail page.

Sample Setup Displaying Different DFF Levels per Site

As discussed elsewhere in this section, out-of-box, Oracle iStore ships two templates for DFF implementation at the cart- and item-level. By default, these templates are not enabled; see the section, "Implementing DFFs in Oracle iStore", for implementation information about these templates and DFF display. The following presents a scenario for enabling DFFs at different levels for three different sites. This is accomplished by setting up unique template-JSP mappings for each site.

For steps to map JSPs to Display Templates at the site level, see the "Implementing the Catalog" chapter.

1. Scenario 1: Implement only cart-level DFFs in Site 1

For Site 1, map only STORE_CART_ADDINFO_HEADER to ibeCScdHdrAdditionalInfo.jsp.

Thus, when the user selects the Additional Information action, cart-level DFFs display.

1. Scenario 2: Implement only item-level DFFs in Site 2

For Site 2, map only STORE_CART_ADDINFO_LINE to ibeCScdLineAdditionalInfo.jsp.

Thus, when the user selects the Additional Information action, item-level DFFs display.

1. Scenario 3: Implement both cart- and item-level DFFs in Site 3

For Site 3, map both the templates to the respective JSPs. Thus, when the user selects the Additional Information action, cart-level DFF information displays, and an LOV allows the user to select either cart or item information.

Note: Remember, along with these templates, the profile option, IBE: Use Additional Information, should be set to Yes.

Display Template Mappings Import and Export

Oracle iStore's Display Template Mappings Import/Export functionality allows you to export or import template mappings using Extensible Markup Language (XML) files. The functionality is implemented as two concurrent programs:

- iStore Template Mapping Import Concurrent Program
- iStore Template Mapping Export Concurrent Program

You can find an introduction to Display Templates in the chapter, Implementing the Catalog, page 9-1.

Template Mappings Import/Export Features and Benefits

Utilizing the template mappings import/export functionality can provide numerous benefits in your maintenance of Oracle iStore templates. Using the concurrent programs and XML files you can export, update, and import template:

- Names
- *Applicable To* categories
- Keywords
- Descriptions
- Source file site/language mappings
- Mappings between sites

In summary, this functionality's benefits and features include:

- By altering the mappings in the XML file and then importing the changes, you can update template attributes, such as name, Applicable To category, and source file mappings.
- You can transfer template mappings between sites in the same instance.
- You can transfer template mappings between instances -- for example, between a test and production instance.
- Concurrent programs allow you to schedule background jobs to run automatically, thus minimizing the maintenance time impact.
- Template creation is supported during the import process. The import program will create a new template if the programmatic access name of the template does not exist in the target instance.
- When you run the export concurrent program, you have the ability to select a specific site(s) whose template mappings you wish to export.
- The functionality features the ability to export only templates matching a specific Applicable To category.
- You can select to export all templates mappings, only seeded template mappings, or only custom template mappings.
- The concurrent program log files allow you to view the results of the program execution.
- Debug functionality allows troubleshooting of the concurrent program process. See the section, "Setting up Debug for Template Mappings Concurrent Programs", in this chapter, for details.

Note that the comma separated values (.csv) format is not supported for template mappings import/export.

Running the Template Mapping Export Concurrent Program

To export template mappings to an XML file, you use the iStore Template Mapping Export concurrent program. To set up debug functionality for the program, see "Setting up Debug for Template Mappings Concurrent Programs", in this chapter.

The following are the parameters you can choose from when running the export concurrent program:

- **Site Code:** The Site Code LOV contains a list of all existing site codes across all instances. To export template mappings from a specific site, select a site from the Site Code LOV. To export from all sites, leave the LOV blank. You can only select one site at a time the LOV.

- Note that site code is different from site ID. Site code is an administrator-definable field (accessible from the Site Details page) which will be the same across instances for the same sites, while site ID is a system generated ID which can be different across instances for the same sites.
- **Template type:** The Template type LOV allows you to select either Seeded or Custom (non-seeded) template mappings. To export all types, leave the LOV blank.
- **Template category:** The Template category LOV allows you to filter the output by template Applicable To category. To export all categories, leave the LOV blank. For a discussion of the Applicable To categories, see the "Seeded Display Data" appendix.

Running the concurrent program will create an XML file. The name of the export file is system-generated. See the section, "Template Mapping Export Program Log File", below, for more details.

Template Mapping Export Program Log File

After running the concurrent program:

1. View log file details of the export. To view the output, select View Output button on the View Request screen (from the menu select View, Requests).
2. To save the output file, select File > Save As and save the output as an XML file from the browser. Note that you must set the profile option, Viewer Text, to be able to save the output from the browser.
3. Edit the XML file as desired. For example, change site codes, file names, or template categories. Save and upload the file to the server on which your concurrent manager is running. Ensure that the user running the concurrent manager program has read-write permission on the server.

The log file contains such information as:

- Date the program was executed
- Parameters involved in the execution:
 - Site code (if applicable)
 - Template type (if applicable)
 - Template category (if applicable)
- Result:
 - Number of templates successfully exported

- Number of errors
- Template name of the first template that has an error

The following graphic shows an example of an XML file exported by the iStore Template Mapping Export Concurrent Program. The XML file shows the following text with appropriate XML tags: Template Programmatic Access Name, Row References, Name Language, Description Language, Seed Flag, Applicable to category, Keywords, Site Code, Site Name, Language Code, and File Name of XML file.

Template Mappings Export File Example

```

<?xml version="1.0" encoding="UTF-8" ?>
- <Template_Map>
  - <Template_programmatic_access_name="demoTemplate">
    <Row_Reference>1</Row_Reference>
    <Name language="en">demoTemplate</Name>
    <Description language="en">demoTemplate</Description>
    <Seed_Flag>No</Seed_Flag>
    <Applicable_To>PRODUCT_SECTION</Applicable_To>
    <Keywords>demoTemplate</Keywords>
  - <Map>
    <Seed_Map>No</Seed_Map>
    <Site_Code default="no">demoSite1</Site_Code>
    <Site_Name>demoSite1</Site_Name>
    <Language_Code default="no">US</Language_Code>
    <File_Name>demoTemplateFile</File_Name>
  </Map>
</Template>
</Template_Map>

```

Running the Template Mapping Import Concurrent Program

To import template mappings from an XML file, you use the iStore Template Mapping Import concurrent program.

Prerequisites:

1. In order to import template mappings, you must first upload the appropriate XML file to a directory on the application web server. For example, template1.xml is put in /nfs/group/crmeco/html through ftp on machine2.
2. Ensure that the user running the concurrent manager program has read-write permission on the server.
3. AutoConfig must be enabled in order for the template import feature to fully work.

If AutoConfig is not enabled for the instance, upload the file to a directory of the machine that concurrent manager is running on. Here is how to find the machine that concurrent manager is running on:

- Login to Oracle Forms using System Administrator responsibility.
 - Navigate to Concurrent > Manager > Administer. In the Administer Concurrent Managers window, under the Standard Manager entry, the machine name will appear in the Node (standard manager) column. This will be the machine the concurrent manager is running on. For more information, see *Oracle E-Business Suite Setup Guide*.
4. Consider setting of the *Save after every successful template import* input parameter --- If the autosave input parameter is turned on, a commit is called for the successful save of every individual template and its mappings. If autosave is turned off, the data is committed to the database only once for all of the counts of the templates and their mappings. If the rollback/commit segment is less, this may cause some issues in committing the data. In such a case, you should turn on the autosave and re-run the Template Import program.

The following are the parameters involved when running the import concurrent program:

Note: Seeded template mappings are ignored during the import process.

- **Source file name** -- You must enter the import concurrent program parameter source file name including machine name and full path of the file. For example, you would enter `machine2:/nfs/group/crmeco/html/template1.xml`.

Note: The file name is case-sensitive.

- **Save after every successful template import:** Select Yes to save after every successful template import. If you select No, then the system will save mappings all together at the completion of the import process.

- **Automatically stop the import if there are too many errors:** You can use this parameter to stop the concurrent program execution if a certain number of errors occur during import. Select Yes to use the feature; select No to not use the feature.

If you select Yes, you must fill in a number in the next field, "Number of template errors to stop the import".

- **Number of template errors to stop the import:** Enter the number of **data** errors after which to stop the import.

This field works only on data errors. The "Automatically stop the import if there are too many errors" field must be set to Yes for this field to be effective. The program will stop executing if a fatal error happens whether this field is set or not.

Note: For the purpose of this functionality, errors are categories as one of two types:

- *Fatal* errors: The source file is not found or file format is incorrect.
- *Data* errors: A template mapping definition is incorrect.

Template Mapping Import Program Log File

You can use the log file of the concurrent program to view details of the import, including:

- Date the program was executed
- Parameters involved in the execution:
 - XML source filename
 - Save after every successful template import: <Yes/No>
 - Automatically stop the import if there are too many errors: <Yes/No>
 - Number of template errors to stop the import: <number>
- Result:
 - Number of templates successfully imported
 - Number of errors
 - Row number of first template that has an error

For steps detailing how to view log files, see the "Concurrent Programs" chapter.

Setting up Debug for Template Mappings Concurrent Programs

Oracle iStore allows troubleshooting of the import/export concurrent program process by turning on the concurrent program's "Turn on trace" parameter. You can enable this flag for both the template mappings import and export concurrent programs.

Use the following steps:

1. Log in to Oracle Forms using Application Developer responsibility.
2. Navigate to Concurrent, Program, and find either the iStore Template Mapping Import program or the iStore Template Mapping Export program.
3. Select the Parameters button.
4. Find the DEBUG_FLAG parameter and select the Enabled checkbox.

5. Save the changes.
6. When you run either of the concurrent program for which you have enabled the debug flag, you will see the "Turn on trace" flag on the parameter screen. The debug information is included in the log file of the concurrent program. See the sections, "Template Mapping Export Program Log File" and "Template Mapping Import Program Log File", for more information.

Copying Template Mappings Between Sites in the Same Instance

You can transfer existing template mappings from one site to another within the same instance by doing the following:

1. Run the export concurrent program with the desired parameters, selecting only one site in the export. For parameters, see the section, "Running the Template Mapping Export Concurrent Program".
2. Modify the XML file's site parameter to reflect the Site Code of the site you wish to transfer the mappings to.
3. Run the import concurrent program, selecting the desired parameters. For parameters, see the section, "Running the Template Mapping Import Concurrent Program".

Copying Template Mappings Between Instances

You can transfer existing template mappings (for all sites/categories/types) from one instance (for example, instance A) to another (for example, instance C) by doing the following:

1. Run the export concurrent program from source instance, leaving Site Code, Template Type, and Template Category blank. For parameters details, see the section, "Running the Template Mapping Export Concurrent Program".
2. Upload the export XML file to a directory accessible to the destination instance.
3. Run the import concurrent program from the destination instance, selecting the desired import parameters. Be sure to enter the complete path of the XML file in the Source File Name field. For parameters details, see the section, "Running the Template Mapping Import Concurrent Program".

Advanced Product Relationships Procedures

This section contains information on advanced tasks surrounding product relationships. General information on relationships can be found in chapter, Implementing the Catalog, page 9-1.

Building Relationships Using Other than the Related Type

If you use any relationship type other than the seeded, supported relationship type **Related**, you must customize the Oracle iStore JSPs to retrieve the related items with the Java API:

```
oracle.apps.ibe.catalog.Item.getRelatedItems().
```

This method can retrieve related items of given an item ID and a relationship type. The method is also overloaded. See the Oracle Integration Repository for documentation of this method.

If the relationship type is also seeded in Oracle Inventory, then `oracle.apps.ibe.catalog.Item.getRelatedItems()` retrieves related items defined in Oracle Inventory as well as in Oracle iStore.

- See *Oracle Inventory User's Guide* for details on how to set up and use Oracle Inventory.

Seeded Relationship Types

Use the following Oracle iStore seeded relationship types build relationships:

- **Collateral** --- Entity B is collateral (e.g., marketing brochures) that exists for entity A
- **Complimentary** --- Entity B is available free of charge with entity A
- **Conflict** --- Entity A is not usable together with a related entity B
- **Cross-Sell** --- Entity B can be offered and sold along with entity A
- **Impact** --- Entity A is usable together with related entity B, but only under certain conditions
- **Mandatory Charge**
- **Optional Charge**
- **Prerequisite** --- Customer must have entity B before purchasing entity A, or related product/event must be possessed/attended beforehand
- **Promotional Upgrade** --- Entity A ordered by customer is upgraded to entity B of equal or higher value, with no change in price.
- **Related** --- Entity B is related to entity A
- **Service** --- Entity B is a service item that can be added to cart for a serviceable entity A

- **Substitute** --- Entity B can be substituted for entity A
- **Superseded** --- Entity B supersedes entity A, which is no longer available
- **Up-Sell** --- A newer version, entity B, can be sold instead of entity A

Creating New Relationship Types

You can define new relationship types using the Site Administration Application.

To define a new relationship type, log in to the Site Administration UI and select Catalog > Relationships > Create Relationship.

Guidelines

Keep in mind the following guidelines:

- Seeded relationship types will have a Remove icon that is grayed out. Non-seeded relationship types will display a viable Remove icon next to them for removal of the relationship type.
- Create Mapping Rules to use Oracle iStore rule builder, and follow the steps in the section, "Creating Relationships Using Mapping Rules", in the "Implementing the Catalog" chapter.
- Create a SQL Rule to specify an SQL query. See the section, "Creating Relationships Using SQL Rules", below, for instructions.

Creating Relationships Using SQL Rules

The SQL method of creating relationship rules in Oracle iStore is used in place of the mapping rules by highly technical personnel with knowledge of SQL. Most site managers will use the mapping rules.

Note: You cannot use Relationship rules created using the Oracle iStore rule builder and the SQL rules together for the same relationship.

Caution: If you set up an SQL rule with a relationship type, you cannot delete it.

If a relationship is driven from an SQL rule type, the SQL statement is executed at runtime to get the actual item-level relationships. The SQL query can have up to 10 bind variables (and unlike the mapping rules, SQL Rules are not pre-evaluated). These SQL queries are executed at runtime using the input parameters supplied from the JSP page.

SQL Relationship Rules Example:

A customer is selling books on his web site and has set up the attribute1 in the DFF segment of mtl_system_items_b as the author of the book. By defining an SQL type relationship he wants to retrieve all the books belonging to the same author. Here is his sample SQL rule:


```

SELECT msi2.inventory_item_id
FROM mtl_system_items_b ms1, mtl_system_items_b msi2
WHERE ms1.organization_id = msi2.organization_id
AND ms1.attribute1 = msi2.attribute1
AND ms1.inventory_item_id = :item_id
AND ms1.organization_id = :organization_id

```

During runtime, when the value for the bind variable(s) is passed in, the SQL type relationship will retrieve all the items (books) whose author is the same as the item (book) being displayed.

Use the following procedure to create relationships using either the seeded relationship types or types you have created.

Prerequisites

- Required implementation tasks have been performed.
- Products and related category structures must be set up in Oracle Inventory before they can be imported into Oracle iStore. See *Oracle Inventory User's Guide* for details.
- Products in Oracle Inventory must have the required flags set.

To create relationships using SQL, log in to the Site Administration UI and select Catalog, Relationships (select relationship), Update, Create a SQL Rule.

Guidelines

Keep in mind the following guidelines:

- In the SQL Rule textbox, enter your SQL rule. For products in Oracle Inventory, retrieve the `inventory_item_id` column in the `MTL_SYSTEM_ITEMS` table.
- Optionally, select Validate to validate the SQL statement before saving as a relationship rule. This will validate the SQL syntax but not the SQL content.

Using Display Styles for Default Display

Note: It is recommended that you use Display Templates instead of Display Styles for displaying product information in your specialty sites. See the chapter, *Implementing the Catalog*, page 9-1.

You can choose to display products inside a section template based on the Oracle Inventory category to which the products belong. While none of the out-of-the-box Display Templates use display styles, you can create your own custom section Display Template to use the Display Styles functionality. The custom section Display Template can be created so that each product under the section can be displayed differently -- based on its inventory category -- using a Display Style.

The default category set specified by the profile option, IBE: Category Set, contains your sites' product inventory. You can map each category from Oracle Inventory to a Display Style to present content at the category level.

If there are no item-level mappings to Display Styles, Oracle iStore checks for the category-level settings and uses them to display the product.

In Oracle iStore, the display styles functionality allows you to specify a style by which categories of products will display. This allows category-level default display of products in your sites. You can select product categories from within the category set mapped to the IBE: Category Set profile option. Default product display is determined by the display style only when no product-level display parameters are set.

Each display style maps to an Oracle iStore template, which then calls the appropriate template source file (JSP) for the site and language mapping.

When you create and save new display styles in the Display Styles tab, you choose site-level default Display Templates for them. These display styles then appear in the Products and Categories pages. In Products and Categories pages, you can choose a template name to correspond with each display style for a product or a category.

You also can create new Display Styles and register them in the Display Styles pages (in the Advanced tab). See: the section, "Creating Custom Display Styles", in this chapter.

Enabling Display Styles

You must set the following profile option in order to enable the Display Styles pages in the Site Administration UI Advanced tab, and to be able to select display styles as defaults for product display in the Catalog, Products and the Catalog, Sections pages.

- IBE: Enable Display Style --- This profile option specifies whether display styles functionality is apparent in the Oracle iStore Site Administration UI. Set it to Yes at the iStore application level to enable the appearance of certain functionality which is described below. By default, this profile option is set to No.

When the profile option is set to Yes, the following occurs in the Site Administration UI:

- In the Advanced tab, Template Manager subtab, the Display Styles hyperlink appears. You select the Display Styles hyperlink to access the Display Styles page.
- The Display Styles page lists all display styles in your implementation. It also allows access to other pages where you can add and update display styles.
- In the Catalog pages, within the Products subtab, Use Display Styles is selectable as a display option for products in the Select a Display Template LOV.
- In the Catalog pages, within the Sections subtab, Use Display Styles is selectable as a display option for sections in the Select a Display Template LOV.

How Customer UI Pages Display Products with Display Style Mappings

When a Customer UI page displays a product using a particular display style, Oracle iStore selects the appropriate template as follows:

- If there is a product-specific template for the given display style, then the product-specific template is used.
- If no mapping is specified at the product level, and there is a category-specific template, then the category-specific template is used.
- If no template name is selected for a product or a category, then the display style's default site-level template is used on the web page.

Note: Product-level (item-level) configurations override category-level and site-level settings.

Seeded Display Styles

When Oracle iStore ships, five seeded display styles are already set up. In the Site Administration UI, select Advanced, Template Manager, Display Styles to view seeded display styles.

The table below shows the seeded display styles and the Display Templates that they map to out-of-the-box.

Seeded Display Styles and Default Display Template Mappings

Name	Programmatic Access Name	Default Display Template Name and Prog. Access Name
Featured Product	STORE_FEATURED_PRODUCT	Catalog - Featured Product STORE_CTLG_FEATURED_ITEM (ibecfitm.jsp)
Product Detail	STORE_PRODUCT_DETAIL	Product Detail STORE_CTLG_ITEM_DETAIL (ibecitmd.jsp)

Name	Programmatic Access Name	Default Display Template Name and Prog. Access Name
Product Small Description	STORE_PRODUCT_SMALL_DESCR	Catalog - Product Small Description STORE_CTLG_LEAF_ITEM (ibeclitm.jsp)
Product Details	STORE_PRODUCT_DETAILS	Catalog - Product Details STORE_CTLG_ITEM_DETAILS (ibeCCtdItemDetail.jsp)
Product Description	STORE_PRODUCT_DESCR	Catalog - Product Description STORE_CTLG_LEAF_ITEM_INCL (ibeCCtdLeafItem.jsp)

Creating Custom Display Styles

Use the following procedure to create additional display styles beyond those provided out-of-the-box.

Prerequisites

- Since each display style must be mapped to a template, for new display styles, you must first register the applicable templates in the Advanced, Template Manager pages. If the template information is unavailable, you may continue the setup and select a default template later. However, if a template association is requested for any product or category with that display style and it is not specified, Oracle iStore will use the default site-level template. To avoid the error, you can also use the seeded values for display styles, listed under Display Styles in the Advanced tab, Display Styles hyperlink.
- Enable Display Styles functionality by setting the profile option, IBE: Enable Display Style, to Yes at the iStore application level.

To create custom display styles, log into the Site Administration UI and select Advanced, Template Manager, Display Styles, Create Display Style.

Guidelines

Keep in mind the following guidelines:

- Non-seeded display styles will have an active Remove icon, while seeded ones will have a grayed-out Remove icon.
- Name field --- This will be the name used internally by your organization.
- Programmatic Access Name field --- Enter a unique alphanumeric programmatic access name for the display style. The iStore template associated with the display style use this programmatic access name to call the display style.

Configuring Product Presentation at the Category Level

Every product in the product catalog is mapped to a category in Oracle Inventory. Using media, Display Templates, and display styles, you can configure category-level defaults for product display.

Use this procedure to modify defaults for categories. You can only specify defaults for categories belonging to the primary display category set (the value of the IBE: Category Set profile option).

Prerequisites

- Required implementation tasks have been performed, as described in the chapter, Implementation Tasks for Oracle iStore, page 4-1.
- Products have been implemented as described in the chapter, Implementing Products, page 7-1.
- The profile option, IBE: Display Style Enabled, has been set to Yes at the iStore application level.

Mapping Category-Level Default Templates

To map category-level default templates, log into the Site Administration UI and select Advanced, Categories, Assign Templates.

Guidelines

Keep in mind the following guidelines:

- When searching for categories, you can enter partial values in the search textbox, and Oracle iStore automatically appends a wildcard to the end.
- The Category Details: Assign Display Templates page lists all seeded display styles and any mapped, category-level templates.
- The Search and Select: Template page by default will only Display Templates which are meant to be used to display products.

- After the mapping is established, in site pages related to this category that use a given display style, this template overrides the display style default template.

Mapping Category-Level Default Media Objects

To map category-level default media objects, log into the Site Administration UI and select Advanced, Categories, Assign Content.

Deep Linking Support

When advertising your specialty sites and products in e-mails and other Web sites, you can provide deep links from the advertisement to your sites.

Overview of Deep Linking

When users select a deep link, they are automatically directed to the appropriate target based on the parameters in the URL. Possible target pages include, but are not limited to, the following:

- A site home page
- A section page
- An item detail page
- A shopping cart
- Addition of items to a shopping cart
- A published quote
- The login and registration pages

Implementing Deep Links

A deep link's URL points to the entry page, `ibeCZzpEntry.jsp`. To the URL, you append specific parameters that are either required or optional, depending on the deep link target and your Oracle iStore setups. The parameters enable redirection of the user to the intended target page.

Deep Link Targets

The following table summarizes the targets specified in the URL parameters.

Deep Link Targets

Parameter Data	Description
Minisite ID or access name	The target specialty site
Responsibility ID	The responsibility that should be assigned to the user
Language	The display language
Section ID	A section within a specialty site
Item ID	An item, to display its detail page or add it to a shopping cart
Shopping cart	A shopping cart with or without items
Quote ID	A published quote's number
Contract number	A published quote's contract number
UOM	The UOM of an item being added to a shopping cart
Quantity	The item quantity being added to a shopping cart
User name	The user name for login
Password	The password for login
Affiliate	The affiliate that posted the deep link
Source URL	The URL where the deep link was posted
Source e-mail	The e-mail address to which the deep link was sent
Party	The party ID of the registered user who received the deep link
Marketing campaign	The marketing campaign using the deep link

Parameter Data	Description
Marketing source code	The marketing source code used in the deep link
Promotion code	Promotion code used in the deep link
Merchant-definable parameters	Ten parameters that you can define to capture other information in the deep link URL

Deep Link Procedure

Use the following procedure to create a deep link.

Steps

1. Create a deep link URL that uses the following syntax:

```
http://<domain name>/<directory path>/ibeCZzpEntry.jsp?<go
parameter>&<destination parameters>&<globalization
parameters>&<tracking parameters>.
```

For lists of supported parameter values, see:

- "Go and Destination Parameters"
- "Globalization Parameters"
- "Tracking Parameters"

For a sample deep link URL, see the section, "Deep Link Example", below.

1. Include the deep link in an e-mail, Web site advertisement, or any other appropriate location.

Deep Link Example

The following deep link adds an item to the user's active shopping cart:

```
https://oraclestore.oracle.com/OA_HTML/ibeCZzpEntry.jsp?
go=buy&item=293947&qty=1
```

This deep link redirects the user to the URL:

```
https://oraclestore.oracle.com/OA_HTML/ibeCCTpBuyRoute.jsp?
item=293947&qty=1
```

This page is the user's active shopping cart, with one unit of the Oracle Database Enterprise Edition (item ID 293947) added. The active shopping cart also holds any items that the user had previously added.

Go and Destination Parameters

Destination parameters specify the link's destination as commanded by the `go` parameter. The following table lists the supported values. The parameters are required unless otherwise stated.

Go and Destination Parameters

Destination	Go Parameters	Destination Parameters
Specialty site home page. The home page of the specialty site in the <code>site</code> parameter. If the <code>site</code> parameter is not specified, the user is directed to the default specialty site's home page. See the table, "Parameters for Globalization Data" for details about the <code>site</code> parameter.	<code>go=catalog</code>	None
Section page	<code>go=section</code>	<code>section=<section ID></code>
Item detail page	<code>go=item</code>	<code>item=<item ID>&section=<section ID></code> The section parameter is optional.
Shopping cart	<code>go=cart</code>	None
Quote	<code>go=quote</code>	<code>quote=<quote ID>&contract=<contract number></code> The contract parameter is optional.

Destination	Go Parameters	Destination Parameters
Add one item to a shopping cart	go=buy	<pre data-bbox="1045 310 1369 527">item=<item ID>&qty=<quantity>&uom=<UOM>&promotion=<promotion code>&msource=<marketing source code ID>&ref=<referrer URL></pre> <p data-bbox="1045 558 1369 617">The promotion, msource, and ref parameters are optional.</p> <p data-bbox="1045 648 1369 764">The ref parameter specifies the JSP to redirect the user to after adding the item to the cart.</p>
Add multiple items to a shopping cart. When creating a deep link that adds multiple items to a shopping cart, you cannot include model bundles or configurable products.	go=buy	<pre data-bbox="1045 816 1369 1262">item_0=<item ID>&qty_0=<quantity>&uom_0=<UOM>&promotion_0=<promotion code>&msource_0=<marketing source code ID>&item_1=<item ID>&qty_1=<quantity>&uom_1=<UOM>&promotion_1=<promotion code>&msource_1=<marketing source code ID> ... &num=<number of line items>&ref=<referrer URL></pre> <p data-bbox="1045 1293 1369 1381">Use the sequential numbering convention in this example, beginning with item_0.</p> <p data-bbox="1045 1413 1369 1472">The promotion, msource, and ref parameters are optional.</p> <p data-bbox="1045 1503 1369 1612">The ref parameter specifies the JSP to redirect the user to after adding the items to the cart.</p>

Destination	Go Parameters	Destination Parameters
Sign in or register user	go=signin	ref=<referrer> The <code>ref</code> parameter is optional. It specifies the JSP to redirect the user to after login. If the parameter is not set, the user is redirected to the specialty site home page.
Other pages	go=<JSP name>	None

Globalization Parameters

Globalization parameters specify specialty site, responsibility, and language information. Globalization parameters are optional unless otherwise stated.

The following table lists the globalization parameters and their supported values.

Parameters for Globalization Data

Globalization Data	Globalization Parameters
Specialty Site	site=<minisite ID or access name> The site parameter is mandatory if the profile option IBE: Default Specialty Site is not defined.
Responsibility	respid=<responsibility ID>
Display language	language=<language code> The deep link defaults to the specialty site's default language if the language parameter is not set.

Tracking Parameters

Tracking parameters specify link tracking information. Tracking parameters are optional.

The following table lists the tracking parameters and their supported values.

Parameters for Tracking Data

Tracking Data	Tracking Parameters
The affiliate that posted the deep link	affiliate=<affiliate code>
Marketing campaign	campaign=<campaign code>
Marketing source code	msource=<marketing source code ID>
The party ID of the registered user to whom the deep link was e-mailed	party=<party ID>
The e-mail address to which the deep link was sent	src_email=<source e-mail>
The URL where the deep link was posted	src_url=<source URL>
Merchant-definable parameters	param0=<parameter> ... param9=<parameter>
	You can define the ten parameters param0 through param9 to meet other tracking needs.

Customizing Templates

Oracle iStore Customer UI page designs use common components, such as tabs, bins, and common section pages. Each component is based on a template, and the templates are combined to create a site web page. The templates control the appearance of the site through the use of JavaServer Pages (JSP), which combine Application Programming Interfaces (API) to call dynamic data and HTML to present static data. The routing and processing pages determine what to do with the templates.

Oracle iStore comes packaged with a complete set of JSP templates needed to run the site. If you want to expand the functionality of the site web pages or customize the pre-packaged templates, then you need to identify the flow of the application and the JSP templates needed to implement the flow. To help determine page flows, see the chapter, Customer Application Process Flows, page 37-1.

How Customer UI Pages Call Templates

Your Customer UI page can call for templates to display in two ways:

- Directly by using the template logical (programmatic access) name
- Indirectly by using the display style

Templates Called by Logical Name

You assign a template name and a programmatic access name to a template using the Advanced, Template Manager pages. You then assign one or more physical JSP files to combinations of sites and languages. At runtime, Oracle iStore looks at the customer's language and displays the files that are assigned to the customer's language for the site the customer is in. If no file is specified for the language, then the default source file for that site and all languages is displayed. If no file is specified for the site and all languages, then the default file for all sites and all languages is displayed.

You also can use Oracle iStore's Template Mappings Import/Export functionality to preserve existing template mappings and avoid overwriting your customized template mappings

Templates Called Indirectly

You can indicate that the template associated with a given display style will be used when displaying a product.

Note: Although using the display styles functionality provides additional flexibility, none of the out-of-the-box templates use the display styles concept.

Oracle iStore uses the following process to determine which template to use when displaying a product according to a given display style.

Product Template Display Example

1. For a given display style, Oracle iStore uses the template that you associated with the product.
2. If no template is associated at the product level, Oracle iStore retrieves the template associated with the product's primary display category.
3. If no template is associated with the product or category, Oracle iStore retrieves the default template for the display style.

Template Customization Tasks

To customize templates for your site, perform the following tasks after planning your web page designs:

1. Gain an understanding of the recommended and/or mandatory page flows through your specialty sites. See the "Customer Application Process Flows" chapter for more information.

2. Create template source files (JSPs) for pages or for blocks within pages using Oracle JDeveloper. If you are implementing multiple languages, create source files in each of the languages which you plan to support. Or, copy the seeded JSPs (save with a new name) and apply your modifications; then, map the new JSP to the page flow through Template Manager. See the sections, "Creating Template Source Files" and "JSP Naming Conventions", in this chapter, for more information.
3. Choose Oracle iStore template names. See the section, "Creating New Templates", in this chapter, for more information.
4. Register templates in the Site Administration UI. See the section, "Registering New Templates in the Template Manager", in this chapter, for more information.
5. Assign template source files to templates. For instructions, see the section, "Mapping Source Files to Display Templates", in the chapter, Implementing the Catalog, page 9-1.
6. If desired, export or import existing Display Template mappings.

See the Oracle Integration Repository for more information about Oracle iStore Java APIs.

Upgrade Strategy for Custom JSPs

Note: During upgrades, Oracle iStore does not alter custom templates and their JSP mappings -- nor does it overwrite mappings of JSP files to specific site-language combinations.

Creating Template Source Files

You can create new JSP templates to replace or add to the Oracle iStore seeded templates. Different physical JSP templates can be used at run-time based on the user's language and the site being accessed.

Caution: Never change an original JSP from Oracle iStore. To modify a JSP, make a copy of the original JSP and modify only the copy.

It is recommended that you use Oracle JDeveloper to create and modify JSP templates. Although you can create JSPs with any HTML or text editor, Oracle JDeveloper also enables you to debug the code.

The main skills required to create and modify templates are HTML and Java. Java language methods in the HTML content generate dynamic content on the web page.

Example JSP Structure

The structure of a JSP is demonstrated in the following HTML example.

```
<HTML>
```

```
<% import="oracle.apps.ibe.util.*" %>
....
....
<P> Name : <%= customer.getName(12334) %>
```

Where `customer` is a Java class on the server and `getName` is a public method in the class to retrieve the customer name.

```
<P> Picture: <IMG SRC = "<%= customer.getPict(12334) %>">
```

This step can retrieve the image file name from the customer Java class on the server.

```
....
</HTML>
```

Where to Store JSP Source Code

The default UNIX directory for JSP source code is `$COMMON_TOP/html` directory. **Store all of your source JSPs in this directory.** This will make future Oracle iStore upgrades less problematic.

Reboot the Server

Changes made to the JSPs may not appear immediately on the web sites, since you must reboot the Application server before changes take effect.

Deleting the server cache has the same effect as rebooting the Application server. The server cache is located in the UNIX directory `$COMMON_TOP/html/_pages/oa_html`. This cache directory contains `.java` and `.class` files that are generated after the JSP that has been called is translated. These can be safely deleted and will be regenerated when the JSP is invoked through an HTTP request.

After creating or modifying templates, you can pre-compile them to check for compilation errors and to increase the speed of the initial loading.

JSP Naming Conventions

Modify JSP source files only after copying them first. As a best practice, all modified JSPs should follow a standard naming convention.

Note that having a standard naming convention is a best practice suggestion only; it is not mandatory to use a specific naming convention in order for the JSPs to be valid.

Creating New Templates

Creating new templates involves giving the new templates names, descriptions, programmatic access names, and specifying the different physical JSP source files to be used at run-time based on language and specialty site.

The template name is the catalog name that is easy to communicate and use when planning your page designs. An example is **ProductHome**. Template names may be translated for convenience in site administration.

Every template name also has a programmatic access name that is short, unique, and not as descriptive. You will be using the programmatic access names to access the templates via an Oracle iStore public API in your JSP page. An example is **phome**. Programmatic access names are not translated.

The template name and programmatic access name potentially can represent several physical template source files. Each physical file can be assigned to combinations of sites and languages. When Oracle iStore retrieves an assigned template name, the template source file is determined by the mapping of the template name to the current site and language.

The Display Manager is the class that implements Oracle iStore's Template Manager. The Template Manager maintains a mapping from a template programmatic access name to a physical name (JSP) in the file system.

To use the Site Home Page as an example, STORE_HOME (programmatic access name) maps to ibezhome.jsp (physical file). When a web site is active, the Display Manager determines which physical file to call, based on the site being accessed and the user's language. Different source files can be called for different site-language combinations.

The following table shows examples of file names for a fictitious template called **ProductHome**.

Sample JSP File Names for the Template Name ProductHome

Template Name	Programmatic Access Name	File	Specialty Site	Language
ProductHome	phome	hom1f.jsp	Site 1	French
ProductHome	phome	hom1e.jsp	Site 1	English
ProductHome	phome	hom2f.jsp	Site 2	French
ProductHome	phome	hom2e.jsp	Site 2	English

In this example, if a French customer enters Site 1 the site displays the home page file hom1f.jsp, which displays information in the French language.

An English customer in the same Site sees hom1e.jsp instead.

If merchants simply want to display the same information in a different language, they can use just one JSP and use AK regions or FND messages for translation. Mapping different JSPs to different languages would be used to display different information, not just translated information.

You can find steps to use AK regions and FND Messages in the *Oracle Self Service Implementation Manual*.

Registering New Templates in the Template Manager

You must register new templates using the Advanced tab, Template Manager subtab in the Site Administration UI. Use this procedure to create or modify template names and programmatic access names, select default site-level template source files for them, and assign other template source files to them according to site and language settings.

For a list of seeded templates, see the "Seeded Display Data" appendix.

Prerequisites

- A site has been created.
- A language has been defined.

To register a new template, log in to the Site Administration UI and select Advanced > Template Manager > Add Template.

Guidelines

Keep in mind the following guidelines:

- **Name field:** Enter the name by which the template is referred to during the planning stage, i.e., the common name.
- **Programmatic Access Name field:** Enter the logical name by which the template is referred to in its JSP source file.
- **Keywords field:** Optionally, enter any keywords you wish to associate with this template in the Keywords field. After you enter and save keywords, you can use them in the search utility.
- **Applicable To LOV:** The display class describes where the template will be used in the Customer UI. It has no programmatic purpose, but is helpful for grouping templates, and can be used when searching for templates using the search utility. See the section, "Template Categories", in the appendix, Seeded Display Data, page C-1.
- **Default field:** Enter the name and extension (.jsp) of the default source file for the template. The default source file is used when a user attempts to retrieve the template and no other site-language mapping combination has been set up. In a single-language implementation, the default source file will generally be the same for all sites. You do not need to enter a directory name, just the JSP name and file extension.

Understanding Catalog Flow

In preparing to customize Oracle iStore's catalog display, you must first understand the flow involved in the seeded Oracle iStore catalog templates and know the logical name,

physical file, and description for each template. Understanding the interactions between the catalog templates simplifies the task of customizing them.

The catalog display follows either a section display flow or an item display flow.

Section Display Flow

This section discusses the flow of section template display using either Fixed Layout or Configurable Layout.

For an introduction to section Fixed Layout and Configurable Layout, see the chapter, *Implementing the Catalog*, page 9-1.

Section Display Flow for Fixed Layout

Oracle iStore uses the following flow to display a section when Fixed Layout is being used:

1. When a section link is selected, the request goes to the display routing page, `STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)`, which determines which section processing template should be used and forwards the request to that template.
2. The section processing template sets the necessary attributes in the PageContext. `REQUEST_SCOPE` (including the logical template name of the center display page) and forwards to `STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp)`.
3. `STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp)` displays the section.

Section Display Flow for Configurable Layout

Oracle iStore uses the following flow to display a section using Configurable Layout:

1. When a section link is selected, the request goes to the display routing page, `STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)`, which determines which Configurable Layout template should be used and forwards the request to that template. If the section is using seeded Configurable Layout, the layout template will be `STORE_SCT_CONFIGURABLE_LAYOUT (ibeCCtdCmnSctLayout.jsp)`.
2. The `STORE_SCT_CONFIGURABLE_LAYOUT (ibeCCtdCmnSctLayout.jsp)` gets the bin template mapped to each location and the Display Template mapped to the center location, and displays the JSP pages mapped to those templates.

Section Routing Page

`STORE_CTLG_SCT_ROUTE (ibeCCtpSctDspRte.jsp)` is the routing page for sections. It contains the processing logic for determining which template to use when displaying a section. If there is no template associated with a section, the routing page determines

which default template to use based on the hierarchy data setup. There are three default templates:

- Product Detail Template -- STORE_CTLG_FSUBSCT is used for sections with featured subsections.
- Subsection List Template -- STORE_CTLG_SCT_BULLET_SUBSCT is used for sections with only navigational subsections.
- Product Detail Template -- STORE_CTLG_LEAF_SCT_SINGLE is used for leaf sections.

The section routing page applies the following rules when determining which template should be used to display a section:

1. If the section is the site's root section, forward to STORE_CTLG_FSUBSCT_FWD (ibeCCtpFwdSubSct.jsp). The site's root section is treated as a virtual section and the request is forwarded to its first navigational subsection.
2. If the section has a template associated with it (for Fixed Layout, it is a Display Template set up in the Section, Templates, Display Template page; for Configurable Layout, it is the seeded or a custom Configurable Layout set up in the Sections, Templates, Layout page), forward to that template.
3. If the section is a Leaf section, forward to STORE_CTLG_LEAF_SCT_SINGLE (ibeCCtpLeafSctSs.jsp).
4. If the section is a non-leaf section and the section has featured subsections, forward to STORE_CTLG_FSUBSCT (ibeCCtpFSubSct.jsp).
5. Otherwise, forward to STORE_CTLG_SCT_BULLET_SUBSCT (ibeCCtpStBlSuSt.jsp).

Common Section Display Page Used in Fixed Layout

STORE_CTLG_SCT_COMMON (ibeCCtdCmnSt.jsp) is the common display page used for displaying sections when using Fixed Layout. It displays each portion of the common layout for section pages by including the JSP that handles the display in that location. STORE_CTLG_SCT_COMMON includes the following components:

- The menu at the top of the page
- The left bins (Browse Bin, additional left bins) on the left side
- The center components (section path traversed, center display page) in the center of the page
- The right bins (Welcome Bin, eMerchandising posting from Oracle Marketing,

additional right bins) on the right side

See the section, "Example for Fixed Layout", in this chapter, for an example.

Common Section Display Page Used in Configurable Layout

STORE_SCT_CONFIGURABLE_LAYOUT (ibeCCtdCmnSctLayout.jsp) is the seeded common layout page used for displaying sections using Configurable Layout. It gets the template mapped to each location and the Display Template mapped to the center part, and displays the JSP pages mapped to those templates.

STORE_SCT_CONFIGURABLE_LAYOUT includes the following components:

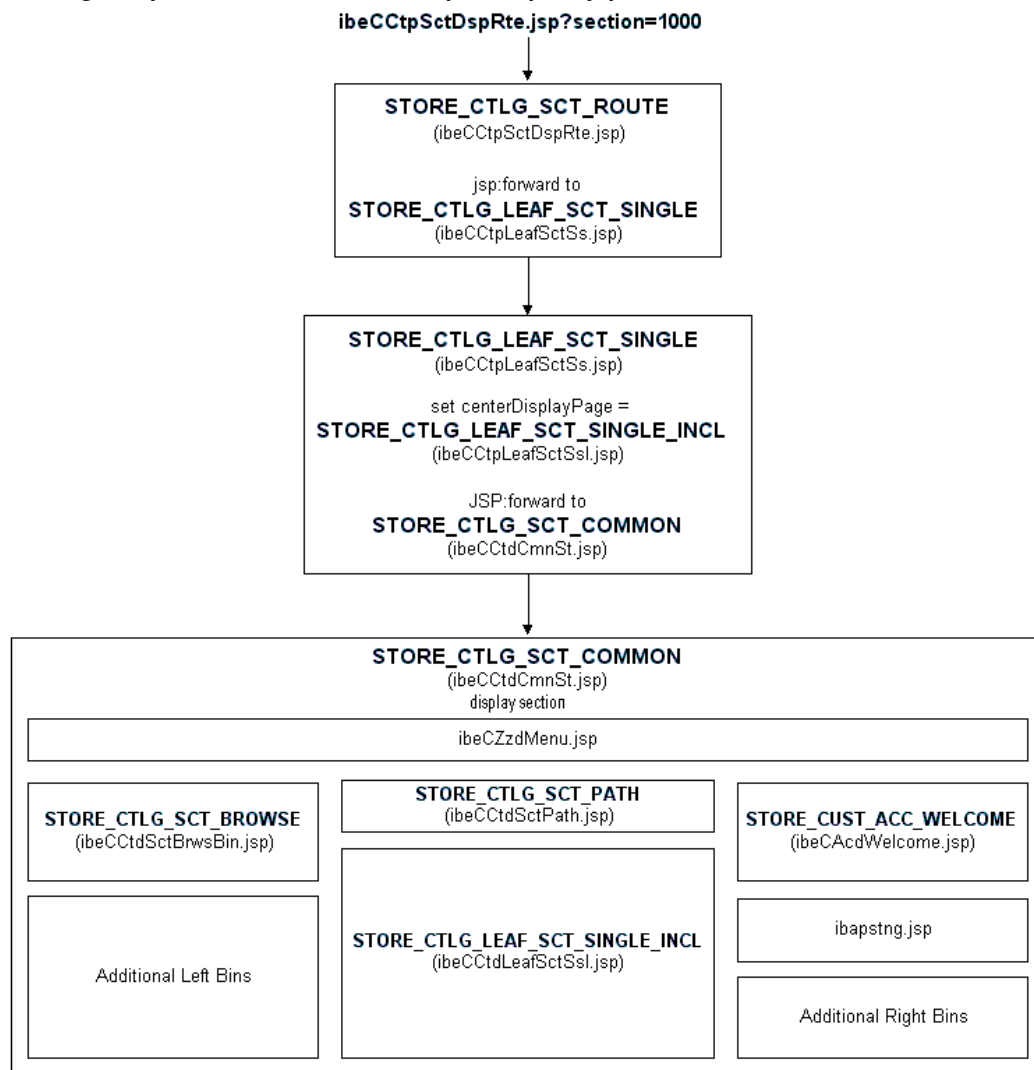
- The menu at the top of the page
- The bins mapped to the top, bottom, left seven locations, right seven locations, and middle four locations
- The section path traversed and the central display page

See the section, "Example for Configurable Layout", in this chapter, for an example.

Example for Fixed Layout

In the following example assume that the data is set up such that template STORE_CTLG_LEAF_SCT_SINGLE is associated with section 1000. This example illustrates the flow through the catalog templates when a user selects on the link `ibeCCtpSctDspRte.jsp?section=1000`.

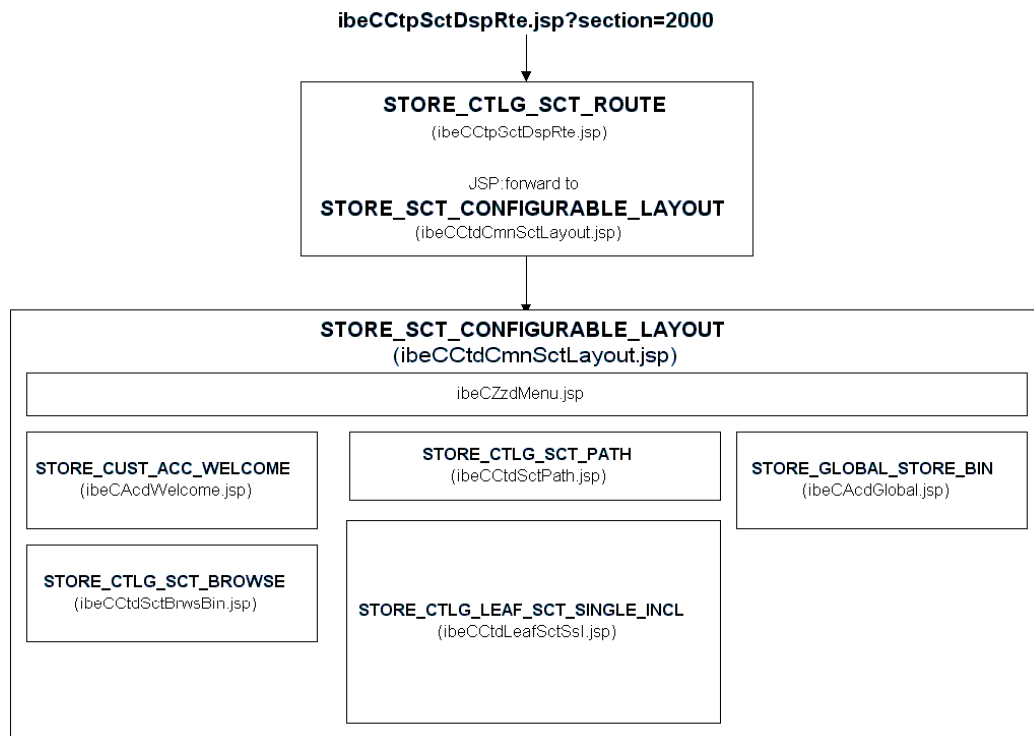
Catalog Template Flow for Link *ibeCtpSctDspRte.jsp?section=1000*



Example for Configurable Layout

In the following example assume that the data is set up such that section 2000 is using Configurable Layout, and select template `STORE_CUST_ACC_WELCOME` for the left 1 location, `STORE_CTLG_SCT_BROWSE` for the left 2 location, `STORE_GLOBAL_STORE_BIN` for the right 1 location, and `STORE_CTLG_LEAF_SCT_SINGLE_INCL` for the Display Template in the center. This example illustrates the flow through the catalog templates when a user selects on the link `ibeCtpSctDspRte.jsp?section=2000`.

Catalog Template Flow for Link `ibeCCTpSctDspRte.jsp?section=2000`



Item Display Flow

Oracle iStore uses the following flow to display an item:

1. When an item link is selected, the request goes to `STORE_CTLG_ITM_ROUTE` (`ibeCCTpItmDspRte.jsp`) which determines the item template to use (the template for display style `STORE_PRODUCT_DETAILS`) and forwards the request to that template. The default template is `STORE_CTLG_ITEM_DETAILS` (`ibeCCtdItemDetail.jsp`).
2. The item template displays the item detail page.

Template Pairing

For each section display, there is a pair of templates:

- A processing page that sets attributes needed by the common display page
- A center display page which generates the HTML for the center of the page

The section processing page specifies which center display page should be used. The following naming convention can be used to identify which section processing page

corresponds to which center display page.

- Section Processing Logical Name: SECTION_PROCESS_NAME
- Section Center Display Logical Name: SECTION_PROCESS_NAME_INCL
- Section Processing Physical File: ibeCCtpName.jsp
- Section Center Display Physical File: ibeCCtdNameI.jsp

Template Pairing Example

Product Detail section Display Template:

- Section Processing Logical Name: STORE_CTLG_FSUBSCT
- Section Center Display Logical Name: STORE_CTLG_FSUBSCT_INCL
- Section Processing Physical File: ibeCCtpFSubSct.jsp
- Section Center Display Physical File: ibeCCtdFSubSctI.jsp

For a list of seeded templates, see the "Seeded Display Data" appendix.

Customizing Section Templates

The following options are presented:

- "Fixed and Configurable Layouts"
- "Fixed Layout"
- "Configurable Layout"

Fixed and Configurable Layouts

For both Fixed Layout and Configurable Layout, you can customize the following:

1. Customize the section routing behavior -- See the section, "Customizing the Section Routing Behavior", below, for details.
2. Customize the section browse bin -- See section, "Customizing the Section Browse Bin", in this chapter, for details.
3. Customize the section path -- See the section, "Customizing the Section Path", in this chapter, for details.

Fixed Layout

For Fixed Layout, you have the following additional customization options:

1. Customize the section template common fixed layout -- See the section, "Customizing the Section Template Common Fixed Layout", in this chapter, for details.
2. Create a section template with the common fixed layout -- See the section, "Creating a Section Page With a Common Fixed Layout", in this chapter, for details.
3. Create a section template with custom fixed layout -- See the section, "Creating a Section Page With a Custom Fixed Layout", in this chapter, for details.

Configurable Layout

For Configurable Layout, you have the following additional customization options:

1. Customize the section template common Configurable Layout -- See the section, "Customizing the Section Template Common Configurable Layout", in this chapter, for details.
2. Create a custom Configurable Layout -- See the section, "Creating a Custom Configurable Layout", in this chapter, for details.
3. Create a central Display Template for Configurable Layout -- See the section, "Creating a Center Display Template for Configurable Layout", in this chapter, for details.

Customizing the Section Routing Behavior

In most cases, the section routing behavior will not need changes since it is data driven. `STORE_CTLG_SCT_ROUTE` (`ibeCCtpSctDspRte.jsp`) contains processing logic for determining the template to forward to based on the template associated with a section. If the section routing behavior needs to be changed (for example, to change the default destination pages when no template is associated with a section), customize `STORE_CTLG_SCT_ROUTE` (`ibeCCtpSctDspRte.jsp`).

Steps

1. Copy `ibeCCtpSctDspRte.jsp` into a new JSP.
2. Make the necessary changes in the new JSP.
3. Modify the template data setup. In this case, the same logical template name should be used because `STORE_CTLG_SCT_ROUTE` is used in all other JSPs when building links to sections.

4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_SCT_ROUTE. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English

Each time a new language is added, you must add a new mapping.

Customizing the Section Browse Bin

If the display of the section Browse Bin (section navigation bin) needs to be changed, customize STORE_CTLG_SCT_BROWSE (ibeCCtdSctBrwsBin.jsp).

Steps

1. Copy ibeCCtdSctBrwsBin.jsp to a new JSP.
2. Make the necessary changes in the new JSP.
3. Modify the template data setup. In this case, the same logical template name should be used because STORE_CTLG_SCT_BROWSE is used in other JSPs when including the browse bin.
4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_SCT_BROWSE. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping.

Customizing the Section Path

If the display of the section path needs to be changed, customize STORE_CTLG_SCT_PATH (ibeCCtdSctPath.jsp).

Steps

1. Copy `ibeCCtdSctPath.jsp` into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because `STORE_CTLG_SCT_PATH` is used in other JSPs when including the path traversed.
4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for `STORE_CTLG_SCT_PATH`. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings"

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping.

Customizing the Section Template Common Fixed Layout

In the seeded templates, all the section templates using Fixed Layout share the same layout. This layout is specified in `STORE_CTLG_SCT_COMMON` (`ibeCCtdCmnSt.jsp`). All section pages using Fixed Layout are ultimately displayed by this page, with the center display page changing dynamically based on the attributes set by the section processing page. If the common layout model will be used, but the layout needs to be changed, customize `STORE_CTLG_SCT_COMMON` (`ibeCCtdCmnSt.jsp`).

Steps

1. Copy `ibeCCtdCmnSt.jsp` into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because the processing section JSPs forward to `STORE_CTLG_SCT_COMMON` to display the section.
4. Log in to the Site Administration UI and add the necessary logical to physical template mappings for `STORE_CTLG_SCT_COMMON`. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English

Each time a new language is added, you must add a new mapping.

Creating a Section Page With a Common Fixed Layout

To provide custom section display, create new section pages. If the new section display will use a common layout, two new JSPs need to be created.

Note: The CENTER_DISPLAY_PAGE used in this example is only a sample logical template used for the purposes of example, not a real template seeded out-of-the-box.

Steps

1. Create a section processing page. This can be done by copying an existing section processing page (such as ibeCCtpFSubSct.jsp) or using the example below as a guideline.

```
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %><%@page import="oracle.
apps.ibe.displaymanager.DisplayManager" %>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%include file="ibeCZzpHeader.jsp" %>
<%
    String JSP_PAGE_NAME = "sectionProcessssPage.jsp";
    String lSectionIdStr = "";
    String lCenterDisplayPage = "";
    String lBeginIndexStr = "";
    /* Welcome Bin */
    pageContext.setAttribute("showWelcomeBin", "true",
        PageContext.REQUEST_SCOPE);
    /* Center Display Page */
    lCenterDisplayPage =
DisplayManager.getTemplate("CENTER_DISPLAY_PAGE").getFileName();
    if(lCenterDisplayPage == null)
    {
        lCenterDisplayPage = ""
        IBEUtil.log(JSP_PAGE_NAME,
            "Null template found for logical template name " +
            "CENTER_DISPLAY_PAGE",
            Logger.ERROR);
    }
}
```

```

}
pageContext.setAttribute("centerDisplayPage", lCenterDisplayPage,
                        PageContext.REQUEST_SCOPE);
/* Get/Set section ID */
lSectionIdStr =
    (String) pageContext.getAttribute("section",
                                    PageContext.REQUEST_SCOPE);
if(lSectionIdStr == null || lSectionIdStr.equals(""))
{
    lSectionIdStr = (String) request.getParameter("section");
    if(lSectionIdStr == null)
    {
        lSectionIdStr = "";
        IBEUtil.log(JSP_PAGE_NAME, "Section is null", Logger.ERROR);
    }
}
pageContext.setAttribute("section", lSectionIdStr,
                        PageContext.REQUEST_SCOPE);
/* Get/Set beginIndex */
lBeginIndexStr =
(String) pageContext.getAttribute( "beginIndex",
                                PageContext.REQUEST_SCOPE);
if (lBeginIndexStr == null || lBeginIndexStr.equals(""))
{
    lBeginIndexStr = request.getParameter("beginIndex");
    if (lBeginIndexStr != null)
    {
        pageContext.setAttribute( "beginIndex", lBeginIndexStr,
                                PageContext.REQUEST_SCOPE);
    }
}
if (IBEUtil.showPosting())
{
    // set item ids in the PageContext.REQUEST_SCOPE for use by
    // eMerchandising postings
    int[] itemIds = new int[0];
    // code to populate itemIds based on the items that will be
    displayed
    // on this section page
    if (itemIds.length > 0)

```

```

        pageContext.setAttribute("itemIds", itemIds, PageContext.
REQUEST_SCOPE);
    }
    String lCommonPage =
        DisplayManager.getTemplate("STORE_CTLG_SCT_COMMON").
getFileName();
    %>
    <jsp:forward page="<%=lCommonPage%" />

```

2. Create a center display page. This can be done by copying an existing section center display page (such as `ibeCCtdFSubSctl.jsp`) or using the example below as a guideline.

```

<%@include file="ibeCZzpRuntimeIncl.jsp" %>
<%@page language="java" %>
<%@page import="oracle.apps.ibe.util.*" %
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.ibe.displaymanager.*" %>
<%@page import="oracle.apps.jtf.base.resources.Architecture" %>
<%@page import="oracle.apps.jtf.base.interfaces.MessageManagerInter"
%>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%
    // processing logic to retrieve all section and item information
that will
    // be displayed on the page
    boolean bSectionLoaded = false;
    Section s = null;
    // declare variables for other objects that will be displayed:
    // for example, featured subsections, navigational subsections,
items,
    // item prices, etc.
    String lSectionIdStr =
        IBEUtil.nonNull((String)pageContext.getAttribute("section",
                                                                PageContext.
REQUEST_SCOPE));
    try {
        int lSectionId = Integer.parseInt(lSectionIdStr);
        s = Section.load(lSectionId, Section.DEEP);
        bSectionLoaded = true;
        // additional code to retrieve objects that will be displayed on
the page:
        // for example, featured subsections, navigational subsections,
items,

```

```

        // item prices, etc.
    } catch (NumberFormatException e) {
        IBEUtil.log(JSP_PAGE_NAME, "Could not parse section id=");
        IBEUtil.lod(lSectionIdStr);
    } catch (SectionNotFoundException e) {
        IBEUtil.log(JSP_PAGE_NAME, "Could not load section. Section
id=");
        IBEUtil.log(JSP_PAGE_NAME, lSectionIdStr);
    }
    if (bSectionLoaded)
    {
%>
        <table width="100%">
        <tr>
        <td valign="top" width="100%" >
        <!-- start middle column content-->
        <%-- code to display section --%>
        </td></tr></table>
    <%
        } // end section was loaded
    %>

```

3. In the Site Administration UI, create a new logical template for the section processing page. Make sure that the category of the template is one of the following:
 - Section Contains Featured Subsection
 - Section Contains Navigational Subsections Only
 - Section Contains Products Only
 - Uncategorized Section Display Template

4. In the Site Administration UI, create a new logical template for the center display page. Make sure that the category of the template is one of the following:
 - Component for Sections Containing Featured Subsections
 - Component for Sections Contain Navigational Subsections Only
 - Component for Sections Containing Products Only
 - Component for Sections

5. Modify the section processing page as needed.

In the JSP, change the logical template name used for the center display page to be the logical template name created for the new center display page. Change

```
lCenterDisplayPage =  
    DisplayManager.getTemplate("STORE_CTLG_FSUBSCT_INCL").  
    getFileName();
```

to

```
lCenterDisplayPage =  
    DisplayManager.getTemplate("CENTER_DISPLAY_PAGE").getFileName();
```

If Oracle Marketing's eMerchandising postings will be used, an `int[]` containing the item IDs of the items that will be displayed on the page must be set in the `PageContext.REQUEST_SCOPE`. There are examples of how to do this in the seeded templates.

6. Modify the display page as needed.

Retrieve the necessary section and item information using the Section and Item APIs, which are described in the Oracle Integration Repository.

Display the information as desired.

7. In the Site Administration UI, map the new template to a section as desired. See the chapter, *Implementing the Catalog*, page 9-1, for steps.

Creating a Section Page With a Custom Fixed Layout

To provide custom section display, create new section pages. If the new section display will use its own custom layout, only one new JSP needs to be created.

Steps

1. Create a section Display Template. See the example below.

```
<%@include file="jtfincl.jsp" %>  
<%@page language="java" %>  
<%@page import="oracle.apps.ibe.util.*" %>  
<%@page import="oracle.apps.ibe.catalog.*" %>  
<%@page import="oracle.apps.ibe.store.*" %>  
<%@page import="java.math.BigDecimal" %>  
<%@page import="oracle.apps.jtf.base.Logger" %>  
<%@ include file="ibeCZzpHeader.jsp" %>  
<%  
    String JSP_PAGE_NAME = "mySectionJsp.jsp";  
    MessageManagerInter msgMgr =  
        Architecture.getMessageManagerInstance();  
    int lSectionId = -1;
```

```

String lSectionIdStr = "";
String lShowWelcomeBinStr = "";
boolean bShowWelcomeBin = true;
String browsePage = "", pathPage = "", welcomePage = "";
Section lSection = null;
// declare variables for other objects that will be
// displayed: for example, featured subsections, items, item
prices, etc
/* Get section ID String */
lSectionIdStr =
    (String)pageContext.getAttribute("section", PageContext.
REQUEST_SCOPE);
try
{
    lSectionId = Integer.parseInt(lSectionIdStr);
}
catch(NumberFormatException e)
{
    lSectionId = StoreMinisite.getRootSectionID().intValue();
}
/* Get show welcome bin */
lShowWelcomeBinStr =
    (String)pageContext.getAttribute("showWelcomeBin",
PageContext.REQUEST_SCOPE);
if(lShowWelcomeBinStr == null || lShowWelcomeBinStr.equals(""))
{
    lShowWelcomeBinStr = "true";
}
if(lShowWelcomeBinStr.equalsIgnoreCase("false"))
{
    bShowWelcomeBin = false;
}
/*
 * Get the value of all the pages and bins to display
 */
/* Section Hierarchy Tree Browse Bin */
if(IBEUtil.useFeature("IBE_USE_SECTION_BIN"))
{
    browsePage =
        DisplayManager.getTemplate("STORE_CTLG_SCT_BROWSE").getFileName();
if(browsePage == null)
    {

```



```

        browsePage = "";
    }
}
/* Section Section Path Bin */
if(IBEUtil.useFeature("IBE_USE_SECTION_PATH"))
{
    pathPage =
        DisplayManager.getTemplate("STORE_CTLG_SCT_PATH").
getFileName();
    if(pathPage == null)
    {
        pathPage = "";
    }
}
/* Welcome Page Bin */
if(bShowWelcomeBin)
{
    welcomePage =
        DisplayManager.getTemplate("STORE_CUST_ACC_WELCOME").
getFileName();
    if(welcomePage == null || welcomePage.equals(""))
    {
        bShowWelcomeBin = false;
        IBEUtil.log(JSP_PAGE_NAME,
            "Welcome Page is either null or not specified",
            Logger.ERROR);
    }
}
if (IBEUtil.showPosting())
    pageContext.setAttribute("pageType", "SECTION",
        PageContext.REQUEST_SCOPE);
/* load section and other objects that will be displayed */
try
{
    lSection = Section.load(lSectionId);
    // additional code to retrieve other objects that will be
displayed
    // on the page: for example, featured subsections, navigational
// subsections, items, item prices, etc.
    if (IBEUtil.showPosting())
    {

```

```

        // set item ids in the PageContext.REQUEST_SCOPE for use by
        // eMerchandising postings
        int[] itemIds = new int[0];
        // code to populate itemIds based on the items that will be
displayed
        // on this section page
        if (itemIds.length > 0)
            pageContext.setAttribute("itemIds", itemIds,
                                     PageContext.REQUEST_SCOPE);
    }
}
catch(SectionNotFoundException ex)
{
    IBEUtil.log(JSP_PAGE_NAME,
                "Could not load (shallow) section with ID" +
lSectionId,
                Logger.ERROR);
    lSection = null;
}
if(lSection != null)
{
    pageContext.setAttribute("_pageTitle", lSection.
getDisplayName(),
                             PageContext.REQUEST_SCOPE);
}
else
{
    pageContext.setAttribute("_pageTitle", "", PageContext.
REQUEST_SCOPE);
}
%>
<%@ include file="ibeCctpPostingI.jsp" %>
<%@ include file="ibeCZzdTop.jsp" %>
<%@ include file="ibeCZzdMenu.jsp" %>
<!-- body section
----->
<table border="0" width="100%">
    <tr>
        <td> &nbsp; </td>
        <!-- left column
----->
        <td valign="top">
            <!-- sections bin ----->

```

```

<%
    if(IBEUtil.useFeature("IBE_USE_SECTION_BIN") &&
        !browsePage.equals(""))
    {
%>
        <jsp:include page="<%=browsePage%" flush="true" /><br>
<%
    }
%>
</td>
<!-- center column
----->
<td valign="top" width="100%">
<%
    if(IBEUtil.useFeature("IBE_USE_SECTION_PATH") &&
        !pathPage.equals(""))
    {
%>
        <table width="100%">
            <tr>
                <td colspan="2" class="smallLink">
                    <jsp:include page="<%=pathPage%" flush="true" />
                </td>
                <td>
                    &nbsp;    
                </td>
            </tr>
        </table>
<%
    }
    if (lSection != null)
    {
        // code to display section/items.
        // for examples, see out of the box section center display
templates
    }
%>
</td>
<!-- right column
----->
<td valign="top">

```

```

        <%-- RHS bins ----%>
        <%-- welcome bin -----%>
    <%
        if(bShowWelcomeBin)
        {
    %>
        <jsp:include page="<%=welcomePage%" flush="true" /><br>
    <%
        }
    %>
    <%
        if(IBEUtil.showPosting())
        {
            IBEUtil.log(JSP_PAGE_NAME, "eMerchandising posting - BEGIN");
            try {
    %>
                <jsp:include page="ibapstng.jsp" flush="true" /><br>
    <%
            } catch (Throwable t) {
                IBEUtil.log(JSP_PAGE_NAME,
page");
            }
            IBEUtil.log(JSP_PAGE_NAME, "eMerchandising posting - END");
        }
    %>
        </td>
    </tr>
</table>
<%@ include file="ibeCZzdBottom.jsp" %>

```

2. In the Site Administration UI, create a new logical template for the section display page. Make sure that you create the template as one that "Displays: section."
3. In the Site Administration UI, map the new template to a section as desired. See the chapter, Implementing the Catalog, page 9-1, for steps.

Customizing the Section Template Common Configurable Layout

The layout template STORE_SCT_CONFIGURABLE_LAYOUT (ibeCCtdCmnSctLayout.jsp) is used to display the layout for all the sections using seeded Configurable Layout. This common Configurable Layout template gets the template mapped to each location and the Display Template mapped to the center part, and displays the JSP pages mapped to those templates. If you need to change the layout

of all the section using seeded layout template, customize STORE_SCT_CONFIGURABLE_LAYOUT (ibeCCtdCmnSctLayout.jsp).

Steps

1. Copy ibeCCtdCmnSctLayout.jsp into a new JSP.
2. Make the necessary changes in the new JSP.
3. The template data setup will need to be modified. Log in to the Site Administration UI and add the necessary logical to physical template mappings in STORE_SCT_CONFIGURABLE_LAYOUT. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in Specialty Site And Language Mappings:

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping.

Creating a Custom Configurable Layout

You can create a custom Configurable Layout. The new custom layout will be displayed in the Select Layout drop-list in Sections, Templates, Layout page during setup, and you can use the custom layout for a section. The custom layout page should have the similar logic as that in the seeded Configurable Layout: gets the template mapped to each location and the Display Template mapped to the center part, and display the JSP pages mapped to those templates. But it can have different display layout.

Steps

1. Create a custom Configurable Layout page. This can be done by copying and modifying the seeded Configurable Layout page (ibeCCtdCmnSctLayout.jsp) . In the layout page, the following API can be used to get the bin template mapped to each location (including the Display Template mapped to the center):

```
Public Template Oracle.apps.ibe.displaymanager.DisplayManager.  
getSectionComponentTemplate(int SectionId, String locationCode)
```

The location code can be Top, Bottom, Left 1 through Left 7, Right 1 through Right 7, Middle 1 through Middle 4, or Center. Center is used to get the center Display Template. If there is no template mapped to the location, or there is no JSP mapped to the template, the API returns null.

2. In the Site Administration UI, create a new logical template for the custom Configurable Layout page. Make sure that the category of the template is Section

Layout. Set the custom Configurable Layout page as the default mapping for the template.

3. Map the custom layout template to the section, and configure the bin templates mapped to each location. See the "Implementing the Catalog" chapter for steps.

Creating a Center Display Template for Configurable Layout

You can create a custom center Display Template and map it to a section using Configurable Layout. At run-time, the Configurable Layout template will load the Display Template mapped to the center part, and display the JSP page mapped to that template.

Steps

1. Create a center display page. This display page is similar to the display page created in step 2 of the section, "Creating a Section Page With a Common Fixed Layout". It can be done by copying an existing section center display page (such as `ibeCCtdFSubSctI.jsp`) or using the example described in the section, "Creating a Section Page With a Common Fixed Layout", step 2, as a guideline.
2. In the Site Administration UI, create a new logical template for the center display page. Make sure that the category of the template is one of the following:
 - Component for Sections Containing Featured Subsection
 - Component for Sections Contain Navigational Subsections Only
 - Component for Sections Containing Products Only
 - Component for Sections
3. In the Site Administration UI, map the new center Display Template to a section using Configurable Layout, as desired. See the chapter, Implementing the Catalog, page 9-1, for steps.

Customizing Item Templates

You can customize item routing behavior and create item detail templates.

Customizing the Item Routing Behavior

In most cases, the item routing behavior will not need changes since it is data driven. `STORE_CTLG_ITM_ROUTE` (`ibeCCtpItmDspRte.jsp`) contains processing logic for determining the template to forward to based on the template associated with display context `STORE_PRODUCT_DETAILS` for a particular item. If the item routing behavior needs to be changed (for example, to change the display context that is used), customize

STORE_CTLG_ITM_ROUTE (ibeCCtpItmDspRte.jsp).

Steps

1. Copy ibeCCtpItmDspRte.jsp into a new JSP.
2. Modify the new JSP as needed. For example, change the display context that is used. If modifying the display context, make sure that all templates associated with the new display context produce HTML for displaying an entire page.
3. The template data setup will need to be modified. In this case, the same logical template name should be used because STORE_CTLG_ITM_ROUTE is used in all other JSPs when building links for items. Log in to the Site Administration UI and add the necessary logical to physical template mappings for STORE_CTLG_ITM_ROUTE. In the Template Details page, add a new source file for the new JSP. To use this source file for all sites and all languages, add a mapping for ALL sites and each installed language.

For example, if French and American English are installed, add two rows in "Specialty Site And Language Mappings":

- All sites, French
- All sites, American English.

Each time a new language is added, you must add a new mapping. Do not change the mapping for ALL sites, ALL languages. If you change this mapping, the change may be overwritten when patches are applied.

Creating an Item Detail Template

To provide a custom display of the item detail page, create a new item detail page.

Steps

1. Copy ibeCCtdItemDetail.jsp into a new JSP or use the example below as a guideline.

```
<%@page import="oracle.apps.ibe.order.*" %>
<%@page import="oracle.apps.ibe.catalog.*" %>
<%@page import="oracle.apps.ibe.store.*" %>
<%@page import="oracle.apps.jtf.displaymanager.*" %>
<%@page import="oracle.apps.jtf.base.Logger" %>
<%@page import="oracle.apps.jtf.minisites.*" %>
<% include file="ibeCZzpHeader.jsp" %>
<%
    MessageManagerInter msgMgr = Architecture.
    getMessageManagerInstance();
    pageContext.setAttribute("_pageTitle",
```

```

                                msgMgr.getMessage
("IBE_PRMT_CT_PRODUCT_DETAILS"),
                                PageContext.REQUEST_SCOPE);

String lItemId =
    IBEUtil.nonNull((String)pageContext.getAttribute("item",
                                                    PageContext.
REQUEST_SCOPE));
    if (lItemId.equals(""))
    {
        lItemId = IBEUtil.nonNull(request.getParameter("item"));
        pageContext.setAttribute("item", lItemId, PageContext.
REQUEST_SCOPE);
    }
    if (IBEUtil.showPosting())
    {
        // used by ibeCctpPostingI.jsp
        pageContext.setAttribute("pageType", "ITEM", PageContext.
REQUEST_SCOPE);
        // set itemIDs[] for eMerchandising posting
        try {
            int[] itemIds = new int[1];
            String itemIdStr =
                (String) pageContext.getAttribute("item", PageContext.
REQUEST_SCOPE);
            itemIds[0] = Integer.parseInt(itemIdStr);
            pageContext.setAttribute("itemIds", itemIds, PageContext.
REQUEST_SCOPE);
        } catch (NumberFormatException e) {}
    }
%>
<%@ include file="ibeCctpPostingI.jsp" %>
<%@ include file="ibeCZzdTop.jsp" %>
<%@ include file="ibeCZzdMenu.jsp" %>
<%
    String lSectionId = "";
    int sectid = 0, itmid = 0;
    Item itm = null;
    // declare variables for other objects that will be
    // displayed: for example, item images, item prices, item
flexfields,
    // related items, etc.
    lSectionId = IBEUtil.nonNull(request.getParameter("section"));
    if (lSectionId.equals(""))

```



```

        lSectionId =
            IBEUtil.nonNull((String)pageContext.getAttribute("section",
                                                                RequestContext.
                                                                REQUEST_SCOPE));
        /* sections path */
        if(IBEUtil.useFeature("IBE_USE_SECTION_PATH"))
        {
            try {
                sectid = Integer.parseInt(lSectionId);
                pageContext.setAttribute("section", String.valueOf(sectid),
                                        RequestContext.
                                        REQUEST_SCOPE);
                pathPage =
                    DisplayManager.getTemplate("STORE_CTLG_SCT_PATH").
                    getFileName();
            } catch (NumberFormatException e) { }
            if(pathPage == null)
                pathPage = "";
        }
        try {
            itmid = Integer.parseInt(lItemId);
            itm = Item.load(itmid, Item.DEEP);
            bItemLoaded = true;
            // additional code to retrieve other objects that will be displayed
            // on the page: for example, item images, item prices, related
            items, etc.
        } catch (NumberFormatException e) {
            IBEUtil.log("ibeCctdItemDetail.jsp", "Could not parse item id="
                        +lItemId);
        } catch (ItemNotFoundException e) {
            IBEUtil.log("ibeCctdItemDetail.jsp", "Could not load item id="
                        +lItemId,
                        Logger.ERROR);
        }
        if (bItemLoaded)
        {
%>
<!-- body section
----->
<table border="0" width="100%">
<%
    if (IBEUtil.showPosting()) {
%>

```

```

<!-- eMerchandising integration ----->
<tr><td colspan="4" align="center">
<% try {
%>
    <jsp:include page="ibapstng.jsp" flush="true" />
<% } catch (Throwable e) {
    IBEUtil.log("ibeCctdItemDetail.jsp", "eMerchandising error",
Logger.ERROR);
    }
%>
</td></tr>
<% } //end eMerchandising installed
%>
<tr><td>&nbsp;</td>
<%
if(IBEUtil.useFeature("IBE_USE_SECTION_PATH") &&
!pathPage.equals(""))
{
%>
    <td colspan="4" class="smallLink">
        <jsp:include page="<%=pathPage%>" flush="true" />
    </td>
<% }
%>
</tr>
<tr><td valign="top"> &nbsp;</td>
<!-- center column
----->
<td valign="top" width="70%">
    <table border="0" cellpadding="0" cellspacing="0">
<!-- code to display item --%>
    </table>
</td>
<!-- right column
----->
<td valign="top" width="20%">
    <table border="0" cellpadding="0" cellspacing="0">
<!-- code to display right bins --%>
    </table>
<p>&nbsp;</p>
<p>&nbsp;</p>

```

```

        </td></tr></table> <!-- end page table -->
<% } // end item loaded
%>
<%@ include file="ibeCZzdBottom.jsp" %>
<!-- ibeCctdItemDetail.jsp end -->

```

2. Modify the new item detail page as needed.

Retrieve the necessary item information using the Item APIs, which are described in the Oracle Integration Repository.

Display the information as desired.

3. The template data setup will need to be modified. In the Site Administration UI, create a new logical template for the new item detail display page. Make sure that you create the template as one that displays products.
4. If the new item detail page should be used as the default template for a display context (such as STORE_PRODUCT_DETAILS), follow the steps in the section, "Using Display Styles for Default Display", in this chapter, for map the new template to a display style.
5. To associate the new item detail template to the appropriate display style at the item level, follow the steps in the "Implementing the Catalog" chapter.
6. To associate the new item detail template to the appropriate display style at the category level, follow the steps in the section, "Configuring Product Presentation at the Category Level", in this chapter.

Repeat this step for each applicable category.

Customizing the Style Sheet

You can provide a custom style sheet using the following procedure.

1. Copy jtfucss.css into another file and make the desired changes to the new file, using the style sheet editor of your choice. Or, create a new style sheet file(s).
2. Map the logical templates discussed above, as desired, to the new files. See the chapter, Implementing the Catalog, page 9-1, for instructions.
3. Restart the Application server after making these changes.

Additional Guidelines

If using a single, customized file for all three branding size profile settings, then map this file to each of the three style sheet templates mentioned above. If you are using

separate customized files for the three branding sizes, you can map the source files separately to each style sheet template. If using only the out-of-box stylesheet files, and `jtfucss_sml.css` and `jtfucss_med.css` are in your instance, map `jtfucss_sml.css` to `STORE_STYLE_SHEET_SML`, and `jtfucss_med.css` to `STORE_STYLE_SHEET_MED`.

Customizing Help

The help icon on the menu will only be displayed if there is a template association for the help page.

Provide a custom help page using the following procedure.

Steps

1. Copy `ibeCZzdHelp.jsp` into another file.
2. Make the necessary changes to the JSP.
3. Modify the template data setup. Log in to the Site Administration UI and add the necessary logical to physical template mappings for `STORE_HELP_PAGE`. In the Template Details page, add a new source file for the new help page. Add the necessary mappings for the desired site-language combinations. To use this source file for all sites and all languages, add a mapping for all sites, all languages. The changes will not be overwritten when patches are applied because there is no seeded default value for `STORE_HELP_PAGE`.

API Documentation

To make advanced changes to the Customer UI page displays, beyond bin layout and text messages, you must have complete knowledge of the APIs being called from the JSP template source file. The APIs are the key for displaying data on the site pages. These are the application objects and beans. Customers and users cannot modify these class files.

For public class API documentation, see the Oracle Integration Repository.

Customer Application Process Flows

This chapter covers the following topics:

- Overview of Customer Application Process Flows Chapter
- Process Flow for Specialty Sites
- Process Flow for Product Search
- Process Flows for Shopping Carts
- Process Flow for Saving Carts
- Process Flow for Cart Sharing and Retrieval
- Process Flow for Shopping Lists
- Carts Page Process Flow
- Quotes Page Process Flow
- Update Quote Process Flow
- High-Level Process Flow for B2B Checkout
- B2B Shipping Information Process Flow
- B2B Billing Information Process Flow
- Process Flow for B2C Checkout
- Process Flow for User Account
- Process Flow for User Profile
- Process Flow for Order Tracker
- Sample User Registration Flows

Overview of Customer Application Process Flows Chapter

This chapter contains process flows for the Customer Application of Oracle iStore.

Note: Many of the flows depicted in this appendix display functionality that is only enabled if B2B users have specific permissions in their user roles. See the appendix, Seeded User Data, page B-1, for information about the B2B permissions.

Process Flow for Specialty Sites

The flow through your specialty sites must follow a certain path, as shown in the following top-level diagram and related detail diagrams. Oracle iStore provides templates you can use for the pages illustrated in the diagrams. For more information, see the following chapters or appendices.

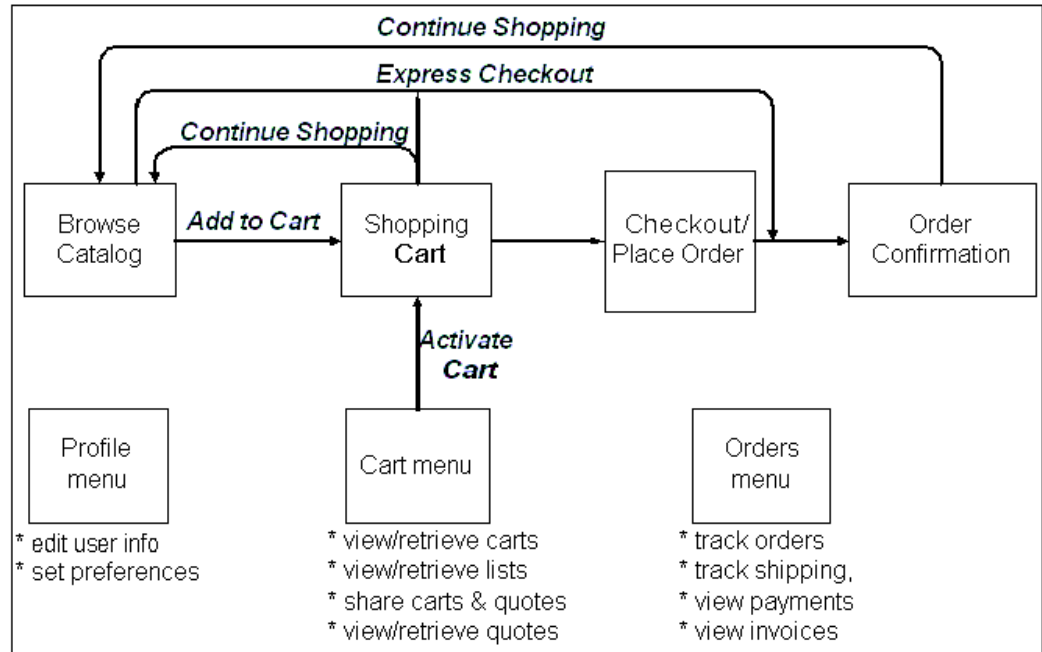
- Implementing Content, page 10-1
- Advanced Display, page 36-1
- Seeded Display Data, page C-1

Process Flow for Specialty Sites

1. Users enter the site and browse through the catalog, optionally searching for items.
2. Users add items to the shopping cart and then check out with the cart to place an order.
3. Users can also retrieve saved and shared shopping carts and quotes, as well as shopping lists using the Cart menu.
4. From the shopping cart, pressing the Continue Shopping button takes users back to the Site Home Page.
5. Users can select Profile to set their preferences, access their address data, and reset their passwords. B2B users can access company information if the administrator has enabled it.
6. Users can also retrieve their account information --- including orders, invoices, payment information --- by accessing the Orders menu.
7. The checkout process takes users to the confirmation page. For more information, see the "Orders Business Flow" in the chapter, Implementing Carts and Orders, page 13-1.
8. Users can select Express Checkout to omit the shopping cart and checkout process; express checkout orders are picked up by a concurrent program and submitted automatically. For more information, see the "Express Checkout" section in the chapter, Implementing Carts and Orders, page 13-1.

The following graphic depicts this flow.

Process Flow for Specialty Sites



Process Flow for Product Search

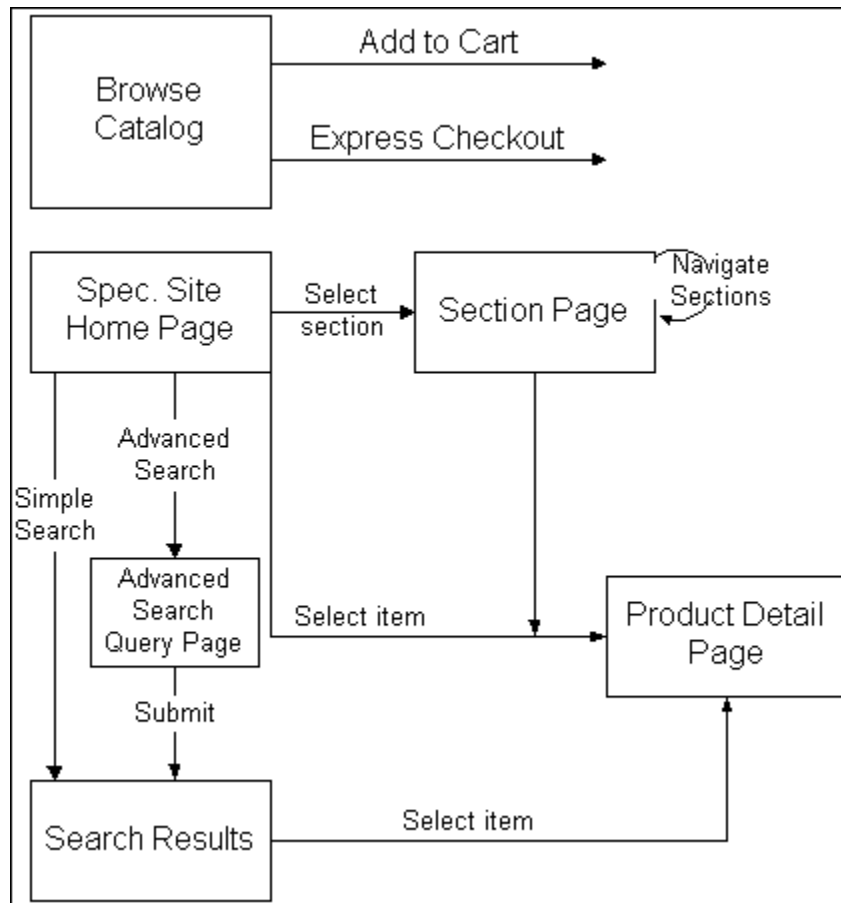
Product search capability from the Site Home Page allows users to locate products by various criteria, if the administrator has enabled this functionality. Users also can browse through sections to locate products.

Process Flow for Product Search

1. Users enter the site at the Site Home Page. Users view groupings of products within sections, and can navigate through the sections to find products.
2. From the Site Home Page, users can conduct a Simple or Advanced search to find products.
3. In the search Results page, users may select a product to review detailed product information.
4. Users can Add to Cart and perform Express Checkout (if enabled) from section and product detail pages.

The following graphic illustrates this flow.

Process Flow for Product Search



Process Flows for Shopping Carts

The diagram and related text in this section show the shopping cart flows for the Actions drop-down menu as well as other flows available from the shopping cart. See the related detail flows for more information:

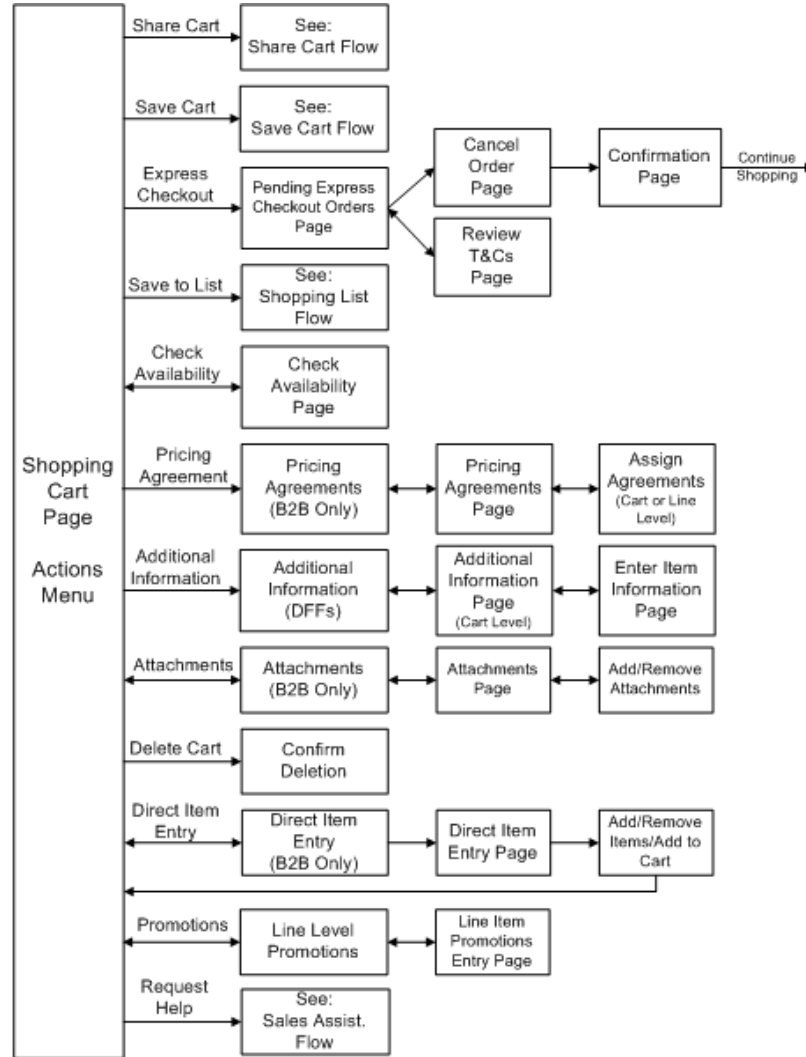
- Process Flow for Saving Carts
- Process Flow for Cart Sharing and Retrieval
- Process Flow for Shopping Lists
- My Carts Page Process Flow
- My Quotes Page Process Flow

High-Level Process Flow for Shopping Cart

The Shopping Cart page features an Actions LOV that allows customers to perform various cart activities. To engage the action, the customer must press the Go button after selecting it. Following are the actions available from the Shopping Cart page:

- **Save Cart:** See "Process Flow for Saving Carts" for this flow.
- **Share Cart:** See "Process Flow for Cart Sharing and Retrieval", for this flow.
- **Express Checkout:** See the section, "Express Checkout Process Flow", in the chapter, Implementing Carts and Orders, page 13-1, for this flow.
- **Save to List:** See "Process Flow for Shopping Lists", for this flow.
- **Check Item Availability:** This action only displays if Check Availability functionality is enabled.
- **Pricing Agreement:** B2B users can select pricing agreements.
- **Additional Information:** This action allowing users to navigate to the Additional Information descriptive flexfield (DFFs) is only available if the Additional Information DFF has been enabled for the shopping cart. See the section, "DFF Process Flows", in the chapter, Advanced Display, page 36-1, for this flow.
- **Attachment:** This action, available to B2B and partner users, allows them to add an attachment to the shopping cart.
- **Delete Cart:** This action which deletes the cart always displays if the user is viewing an active cart. The user must confirm the delete. Deleted carts are no longer accessible. Note that if the user is working with an active quote, he will not be able to delete it.
- **Direct Item Entry:** This functionality is only for (B2B users. See the sections, "Direct Item Entry Process Flow" and "Process Flow for Uploading Comma Separated Values File", in the chapter, Implementing Carts and Orders, page 13-1, for these flows.
- **Line Promotions:** This action allows users to enter valid promotional discount codes for line items that are listed in the active shopping cart.
- **Request Help:** See the "Sales Assistance Process Flow" in the chapter, Implementing Customer Assistance, page 15-1, for this flow.

The following diagram depicts this flow.



Shopping Cart Flows: Other Than from Actions Menu

From the Shopping Cart page, users can perform several activities in addition to those available from the Actions menu. These other activities include:

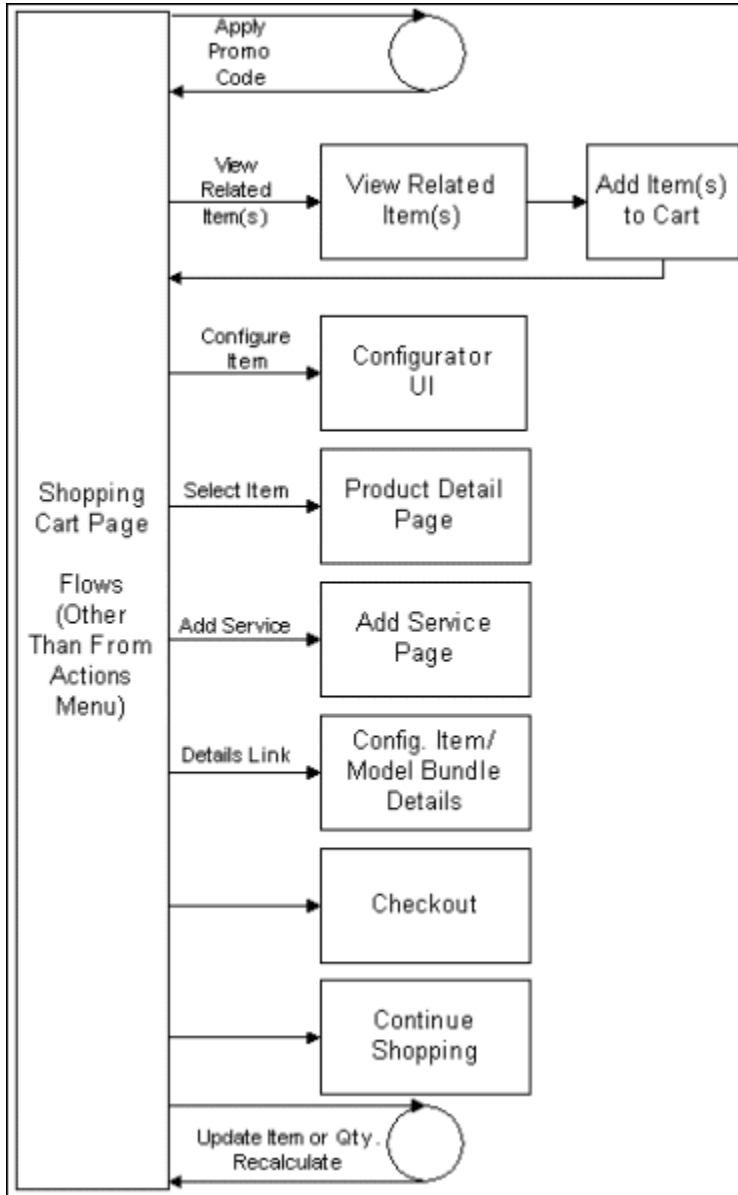
- Enter Promotion Codes:** If implemented, customers can enter known promotion codes into the Promotion Codes textbox and apply the changes. This action applies a promotion code to the cart items. For more information, see the "Common Shopping Cart Elements" section in the chapter, *Implementing Carts and Orders*, page 13-1,
- View Related Items:** If implemented, customers can view items related to those in the cart, adding the items to the active cart if they wish.
- Reconfigure Items:** Customers can select the Reconfigure link underneath an item

in the cart to launch Oracle Configurator and reconfigure the item.

- **View Item Details:** Customer can select the hyperlink of a product name in the shopping cart to drill-down to item details.
- **Add Services:** If implemented, customers can select the Add Service link underneath serviceable items in the cart and add or change existing services for the product.
- **View Configured Item Details:** Customers can select the Details link underneath an configured item in the cart to details of the configuration.
- **Checkout:** Customers can select the Checkout button to begin the checkout process. See the "Process Flow for B2B Checkout" and "Process Flow for B2C Checkout" in this chapter, for these flows.
- **Continue Shopping:** Customers can select the Continue Shopping button to navigate to the catalog pages, where they can shop for additional items.
- **Update Items:** Customers can remove items from the cart. They also can enter new quantities for items and then recalculate the cart totals.

The following diagram depicts these activities.

Shopping Cart - Flows Other Than From Actions Menu



Process Flow for Saving Carts

Users can save a shopping cart at any time by selecting Save Cart action from the Shopping Cart page (this is the active cart).

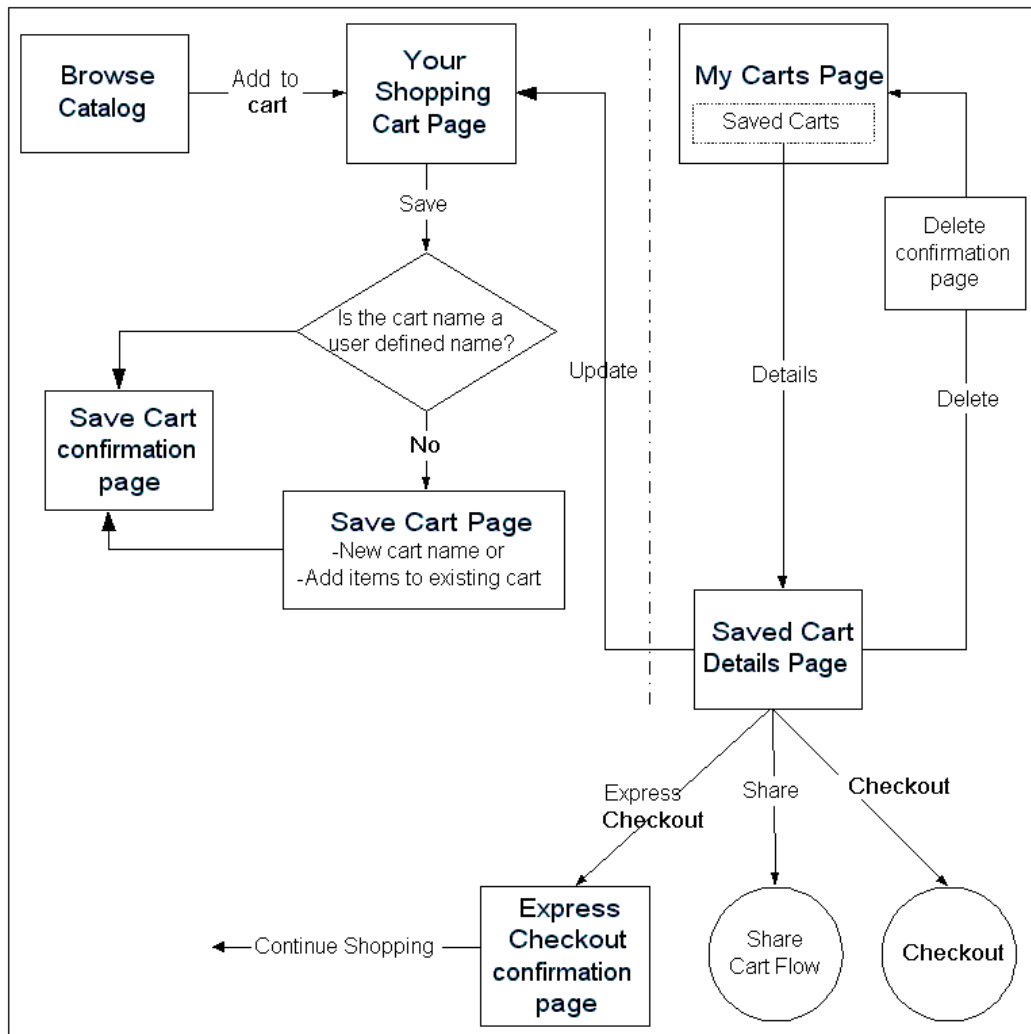
Oracle iStore automatically saves carts with default names, if the user does not explicitly save them. See the chapter, *Implementing Carts and Orders*, page 13-1, for more information.

1. Users select the Save Cart action in the Shopping Cart page.
2. If the user saves the cart and the cart does not yet have a user-defined name, after selecting Save Cart, the user can either create a new saved cart or add items to an existing cart.
3. Oracle iStore displays a confirmation message when the cart is saved.
4. Users can then press the Continue Shopping button to continue browsing the specialty sites.
5. To retrieve saved carts, users navigate to the Carts page within the Cart menu. In the Saved Carts area of the page, users can select several actions (Update, Express Checkout, Share, Duplicate, Delete) to perform with the cart, or can select the cart name hyperlink to retrieve the Saved Cart Details page.
6. From the Saved Cart Details page, users can select identical actions as are available from the Saved Carts area.
7. To activate and potentially modify the cart, the user must select the Update action. The cart then becomes the active cart, and the page is named Shopping Cart.

For more information on cart actions, see the "Common Shopping Cart Elements" section in the chapter, *Implementing Carts and Orders*, page 13-1.

The following diagram illustrates this process flow.

Cart Saving Process Flow



Process Flow for Cart Sharing and Retrieval

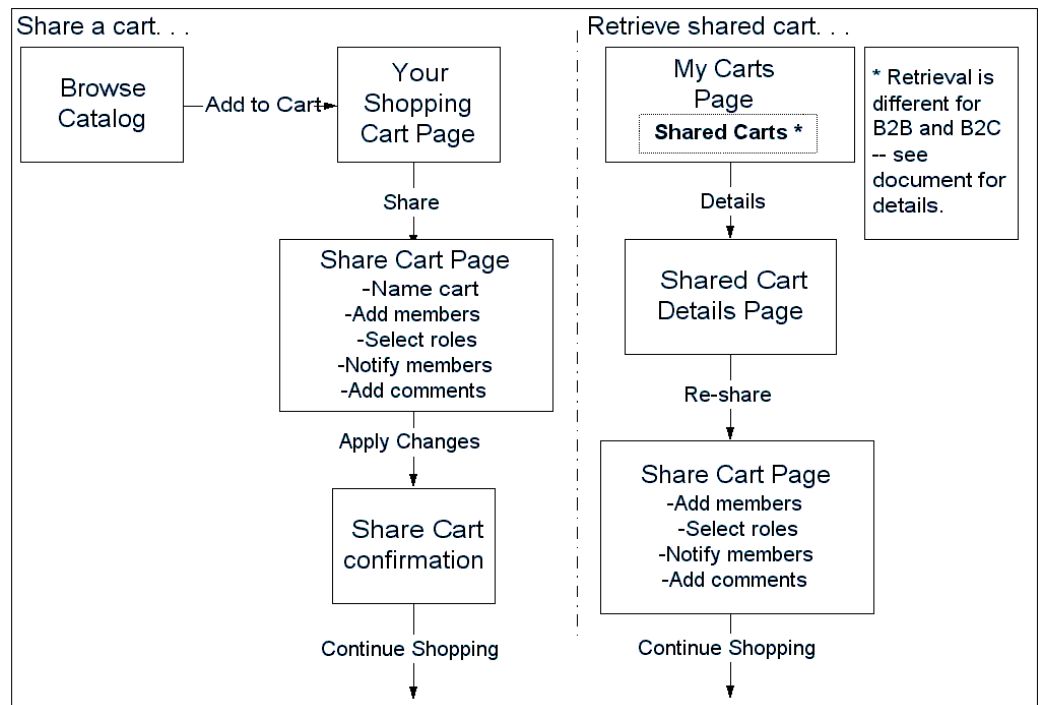
Share cart functionality is available for both B2B and B2C users, and can be controlled by setting a profile option.

1. Users can select the Share Cart action in the cart to share the cart with other users at any time.
2. Users then select or enter cart members.
3. Users select roles for the members and apply the selections. Oracle iStore displays a confirmation page.

4. Shared cart members receive an e-mail with instructions detailing how to access the shared cart.
5. To retrieve the shared cart, users can either select the URL hyperlink in the e-mail notification or navigate to the Carts page, where they can select the shared cart name hyperlink (B2B users) or enter the shared cart retrieval number (B2C users).
6. B2B members with specific roles can then re-share the cart with other members. B2C users must be the cart owner to re-share a cart.

The following figure depicts this flow.

Cart Sharing and Retrieval Process Flow



Process Flow for Shopping Lists

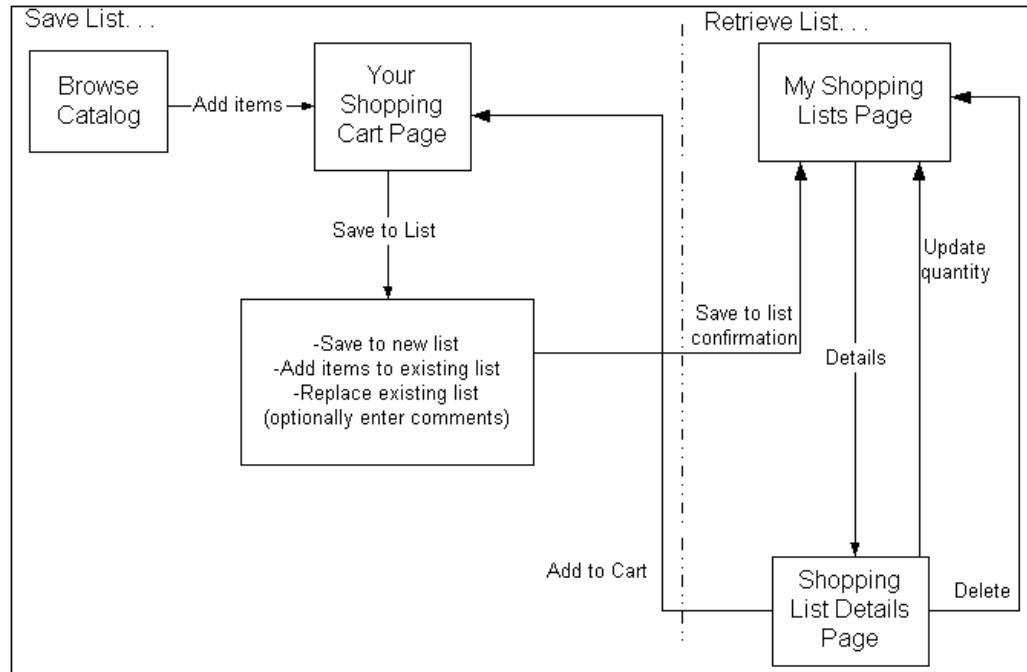
Shopping lists enable users to store items that they may wish to purchase or that they purchase repeatedly.

1. The user selects the Save to List action in the Shopping Cart page.
2. The system prompts the user to enter a new name for the list or to merge the items to an existing list (if one exists).
3. Optionally, the user can enter comments for the list in the Comments textbox.

4. To retrieve a shopping list, the user navigates to the Shopping Lists page within the Cart menu, and selects the hyperlink of the a list name. The Shopping List Details page appears.
5. To add items to the current, active cart, in the Shopping List Details page, the user selects the appropriate items in the shopping list and selects the Add to Cart action.
6. To add items to an existing list, the user selects the appropriate items in the shopping list and selects the Add to List action.
7. Optionally, in the Shopping List Details page, the user can also:
 - Update item quantities by entering the numerical values in the Quantity field and pressing the Update Quantity button.
 - Delete items in the list by activating an item's Select checkbox and pressing the Delete button (not the Delete List button).
 - Drill down to product details by selecting the item name hyperlink. At this point, the user can add item(s) to a new cart and checkout, including Express Checkout.
 - Delete the entire list by selecting the Delete List button.

The following diagram illustrates this flow.

Shopping Lists Process Flow



Carts Page Process Flow

The Carts page within the Cart menu is the entry point for most of the actions that users can perform with carts. The following diagram shows the actions from the Carts page.

For the Quotes page flow, see the Quotes Page Process Flow in this chapter.

- To view a list of saved or shared carts, both B2B and B2C registered users select the Cart icon in the Customer Application, and then select the Carts subtab.

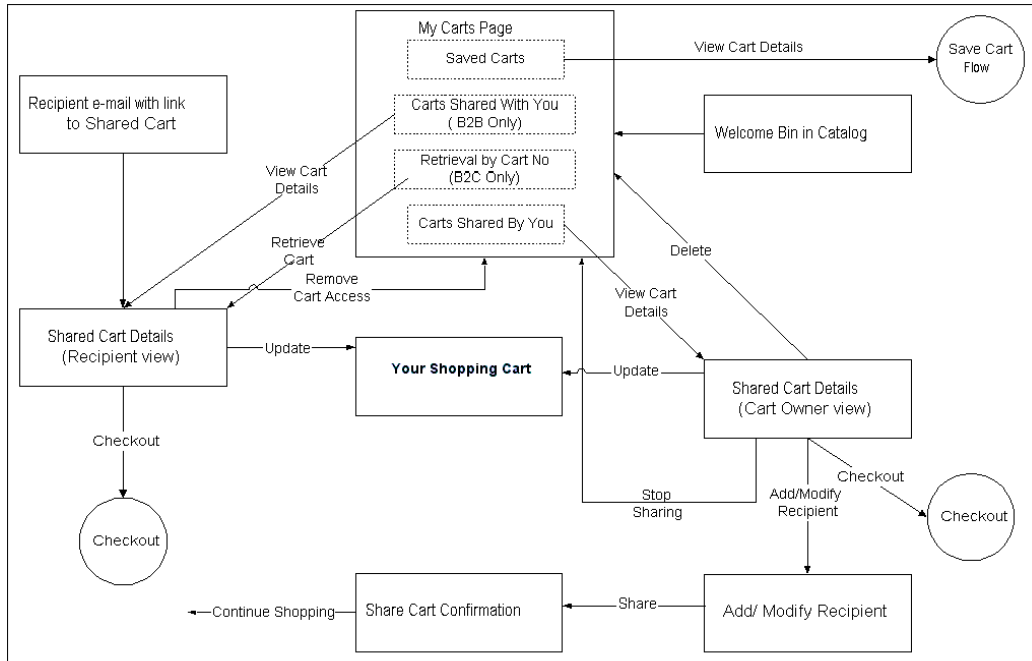
The main sections on the Carts page are:

- Saved Carts
- Carts Shared By You
- Carts Shared With You (B2B only)
- Cart Retrieval Textbox (B2C only)

See the chapter, *Implementing Carts and Orders*, page 13-1, for additional details.

The following diagram illustrates this flow.

Carts Page Process Flow



Quotes Page Process Flow

The Quotes page within the Cart menu is the entry point for quote-related activities. Quotes can originate from:

- Carts that have become quotes in the sales representative assistance flow (see the section, "Sales Assistance Process Flow", in the chapter, Implementing Customer Assistance, page 15-1).
- Quotes published through the quote publishing feature of Oracle Quoting
- Carts that have become quotes when a user rejects terms and conditions, thus activating the sales representative assistance flow
- Quotes shared by users (see the section, "Quote Sharing", in the chapter, Implementing Carts and Orders, page 13-1).

Note that you must integrate with Oracle Quoting to achieve this functionality.

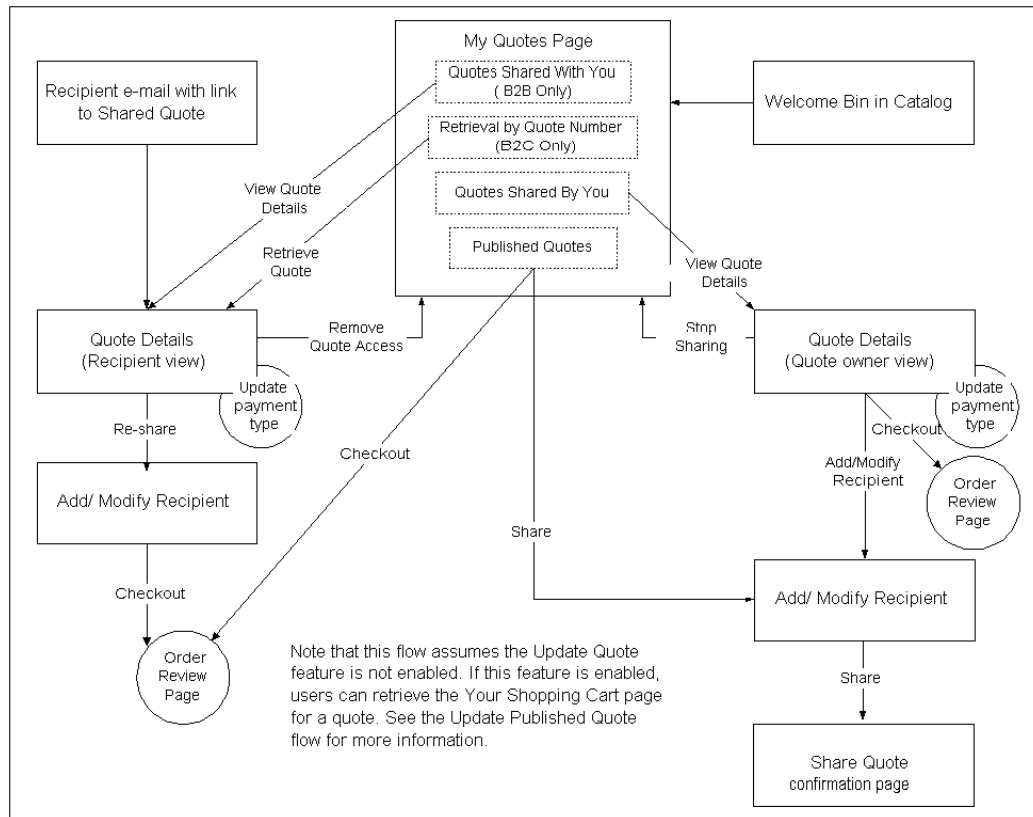
Published quotes and quotes created through the sales representative assistance feature become saved quotes and are shown in the Published Quotes area of the Quotes page. See the chapter, Integrating Oracle iStore with Oracle Quoting, page 28-1, for more information about quote publishing, and the chapter, Implementing Customer Assistance, page 15-1, for more information about the Sales Assistance flows.

Note that this flow assumes the Update Quote feature is **not** enabled. If this feature is enabled and a quote is in Draft status, users can press Update Quote in the Quote Details page to retrieve the Shopping Cart page. See the Update Quote Process Flow and the shopping carts flows in this chapter for more information.

1. To view a list of published or shared quotes, both B2B and B2C registered users select the Cart icon in the Customer UI, and then select the Quotes subtab.
2. The main sections on the Quotes page are:
 - Published Quotes
 - Shared Quotes
 - Quotes Shared By You
 - Quotes Shared With You (B2B only)
 - Quote Retrieval Textbox (B2C only)
3. To access quote details, the user selects a quote name hyperlink.
4. In the Quote Details page, users can view details of a quote and update payment type information for the quote before checking out.
5. In the Quote Details page for a shared quote, the actions the users can perform depend upon their shared cart roles. For more information, see the chapter, Implementing Carts and Orders, page 13-1.

The following diagram shows this flow.

Quotes Page Process Flow



Update Quote Process Flow

By default, users are only able to update the payment type on a quote published in the Customer Application. Of course, they can always check out with a quote if the quote status allows it. Implementers can allow users to perform normal update cart actions with a published quote when retrieving the Shopping Cart page for a quote. See the chapter, *Integrating Oracle iStore with Oracle Quoting*, page 28-1, for implementation information.

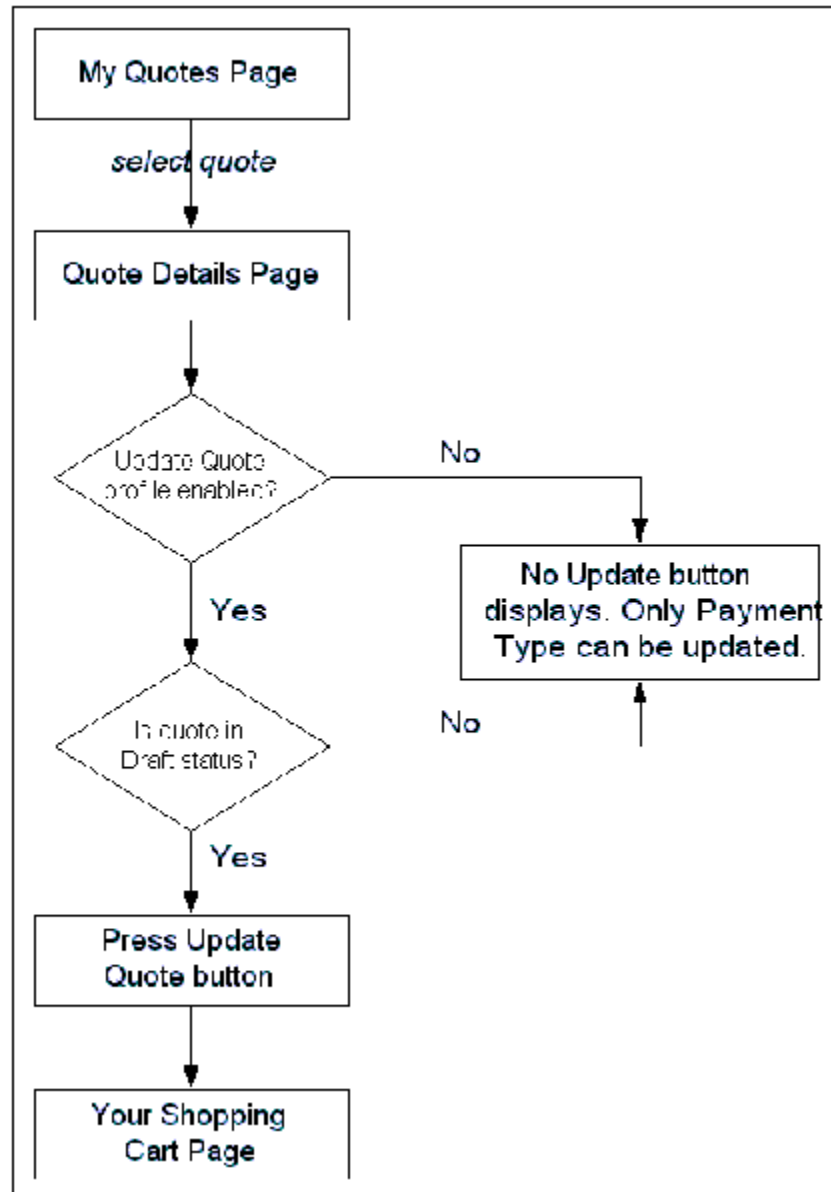
See also: *Implementing Carts and Orders*, page 13-1

1. A B2B or B2C registered user selects the Cart icon in the Customer Application, and then selects the Quotes subtab.
2. The user selects a quote name hyperlink to retrieve the Quote Details page. Note that this flow covers shared carts as well.
3. If the update quote feature is enabled, the Update Quote button in the Quote Details page allows access to the Shopping Cart page, where the user can perform normal cart actions.

4. To allow updating, Oracle iStore also requires that a quote be in Draft status in Oracle Quoting.

The following diagram illustrates this flow.

Update Quote Process Flow



High-Level Process Flow for B2B Checkout

B2B customers who are ready to place their orders navigate to the checkout phase, where they enter shipping and payment information.

Additional Information: The flows in this section assume neither Express Checkout nor Smart Checkout are enabled and that there are shippable items in the cart (no shippable items means the shipping information step is eliminated).

In addition to the high-level process flow for B2B customers checkout, also refer to the following flows:

- B2B Shipping Information Process Flow
- Ship to Multiple Locations Process Flow
- B2B Billing Information Process Flow
- Bill to Multiple Locations Process Flow
- End Customer Information Process Flow
- Multiple End Customers Process Flow
- Commitments and Pricing Agreements Process Flow

The following is the high-level process flow for B2B checkout:

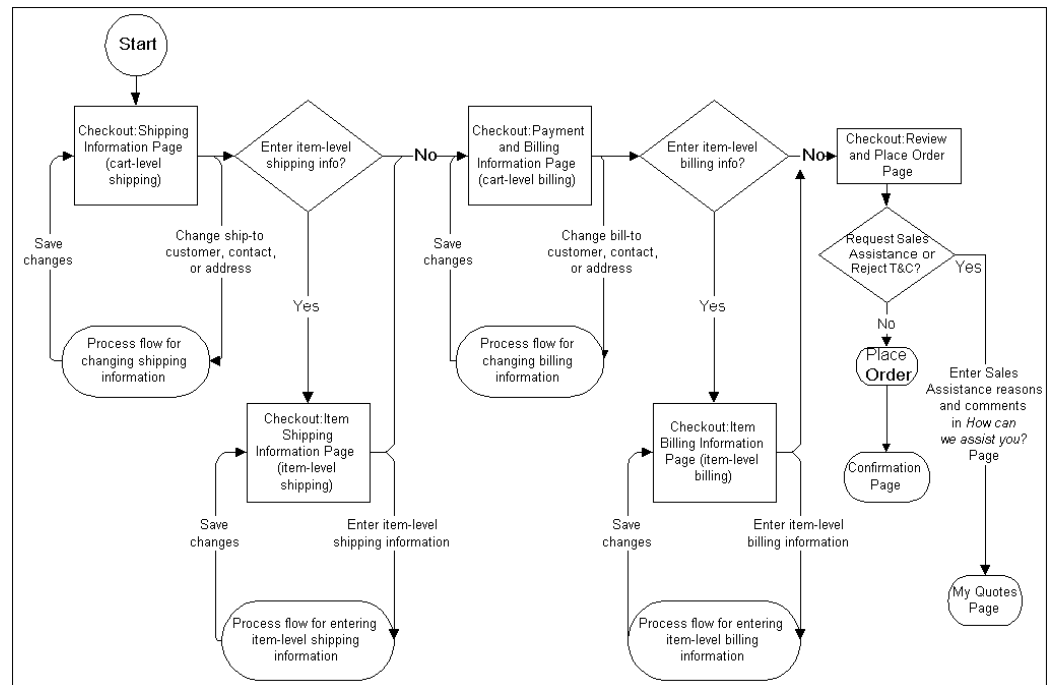
1. When B2B customers proceed to checkout by pressing the Checkout button, they begin in the Checkout: Shipping Information page, where they enter shipping information. Note that B2B users must have the IBE_CHECKOUT permission to access the Checkout button.
2. Customers then proceed to the Checkout: Billing and Payment Information page, where they enter payment and billing information for the order.
3. Customers then proceed to the Checkout: End Customer Information page (if this feature is enabled), where they enter end customer information.
4. Next, customers proceed to the Checkout: Terms and Conditions page (if this feature is enabled), where they agree to the terms and conditions of the order. Customers can review/reject terms and conditions; for information about rejecting terms and conditions, see the chapter, Implementing Carts and Orders, page 13-1.
5. The final page in the checkout flow is the Checkout: Review and Place Order page, where customers can place the order by selecting the Place Order button. Note that B2B customers must have the IBE_CREATE_ORDER permission in their user role to access the Place Order button.
6. After placing the order, users can select Continue Shopping to browse the specialty sites and potentially add more items to shopping carts.

If customers request sales representative assistance in the checkout flow, they must select a reason for requesting assistance and optionally can enter comments in the *How can we assist you in finalizing your order?* page. If the cart is unsaved, the user must enter a cart name. After submission, the cart becomes a quote. Note that B2B users must have the IBE_ASK_SALES_ASSISTANCE permission in their user roles to be able to request sales assistance. For more information on Sales Assistance, refer to the chapter, *Implementing Customer Assistance*, page 15-1.

See also: "Checkout Flow Pages" in the chapter, *Implementing Carts and Orders*, page 13-1

The following diagram illustrates this flow.

High-Level Process Flow for B2B Checkout



B2B Shipping Information Process Flow

B2B customers can change and create the ship-to customer, contact or address for an order at checkout, if they have the required permissions.

1. From the Checkout: Shipping Information page and the Update Item Shipping Information pages, B2B customers (with the required user role permissions) can change the ship-to customer, contact, or address.
2. If customers choose to change the ship-to customer, the Search and Select: Ship to Customer page is displayed, where customers can search for and select from a list

of other ship-to users within their organization. When finished, they return to the Checkout: Shipping Information page.

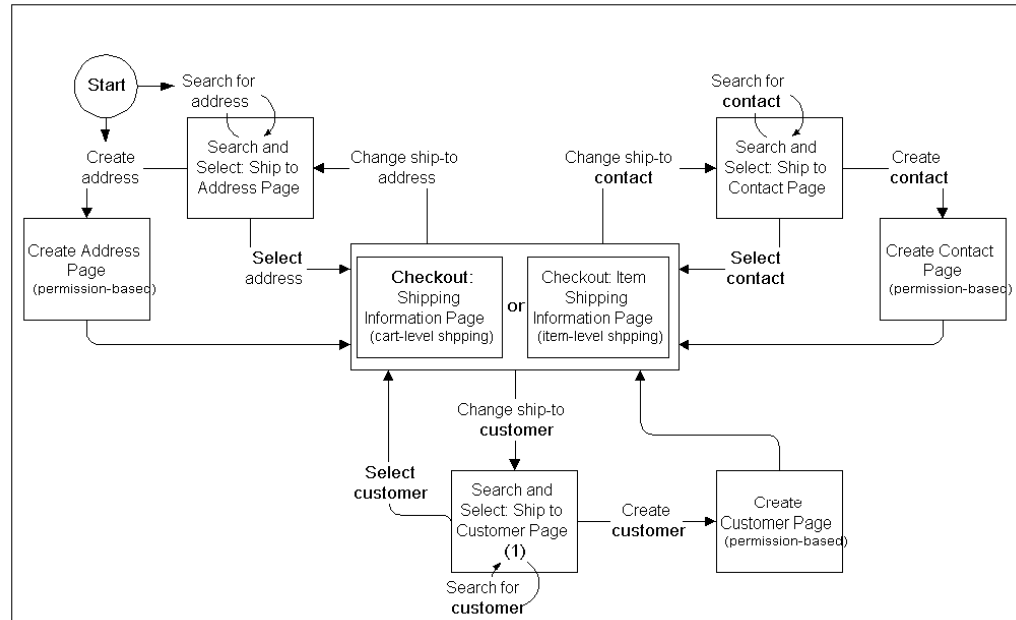
Customers with the required user permissions can also create a new ship-to customer from the Search and Select: Ship to Customer page. In this case, the Create Customer page is displayed, where customers enter information to create the ship-to user. When finished, they return to the Checkout: Shipping Information page.

3. If customers choose to change the ship-to contact, the Search and Select: Ship to Contact page is displayed. In the Search and Select: Ship to Contact page, users can search for and select another ship-to contact from within their organization. When finished, they return to the Checkout: Shipping Information page.
4. Customers with the required user permissions can also create a new ship-to contact from the Search and Select: Ship to Contact page. In this case, the Create Contact page is displayed, where users enter information to create the ship-to contact. When finished, they return to the Checkout: Shipping Information page.
5. If customers choose to change the ship-to address, the Search and Select: Ship to Address page is displayed. In the Search and Select: Ship to Address page, customers can search for and select a ship-to address. When finished, they return to the Checkout: Shipping Information page.
6. Customers with the required customers permissions can also create a new ship-to address from the Search and Select: Ship to Address page. In this case, the Create Address page is displayed, where customers enter ship-to address information. When finished, they return to the Checkout: Shipping Information page.
7. When finished with the shipping information entry, customers continue to the Checkout: Billing and Payment Information page.

For permissions details, see the chapter, *Implementing Carts and Orders*, page 13-1, and the appendix, *Seeded User Data*, page B-1.

The following diagram depicts this flow.

Process Flow for Changing B2B Shipping Information



Ship to Multiple Locations Process Flow

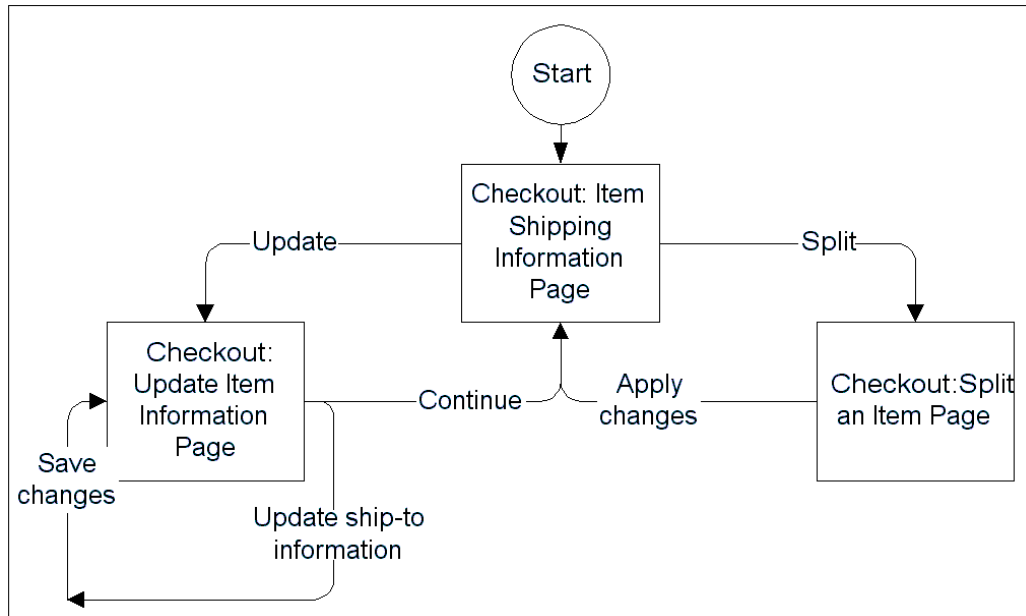
During checkout, customers can enter separate shipping information for different items in their shopping carts, if the administrator has enabled this ability (see the section, "Allowing Item-Level Shipping", in the chapter, Implementing Payment Types and Shipping Methods, page 12-1).

1. From the Checkout: Shipping Information page, B2B customers can enter separate shipping information for different items in their shopping carts by accessing the Ship to Multiple Locations area of the Checkout: Shipping Information page.
2. If a customer has ordered more than one quantity of a single item, the items can be split to specify different shipping information for each duplicate item. From the Ship to Multiple Locations area of the Checkout: Shipping Information page, customers select the Split Quantity icon to retrieve the Split Quantity page. In the Split Quantity page, customers separate the quantities onto separate lines. When they finish splitting the line items, they return to the Checkout: Shipping Information page, with the items split into different rows in the Ship to Multiple Locations area of the page. From this area, customers select items to modify, as described below.
3. To update the shipping details of a specific item, customers select the item and press the Update Shipping Information button; this retrieves the Update Item Shipping Information page for the selected item. From the update page, users can:

- View shipping details for each selected item by accessing the Item Shipping Details pop-up page
 - Change/create ship-to customer, contact, and address (assuming the update/create ship-to permissions are in their user roles)
 - Enter shipping details (Shipping Method, Shipment Priority, Requested Delivery Date, Shipping Instructions, Packing Instructions)
4. When finished changing item-level shipping information, the customer returns to the Checkout: Shipping Information page.
 5. The customer proceeds to the billing information phase.

The following diagram shows the flow.

Process Flow for Item-Level Shipping Information



B2B Billing Information Process Flow

B2B customers can change and create the bill-to user, contact, and address at checkout if they have the required permissions.

1. From the Checkout: Billing and Payment Information page and the Update Item Billing and Payment Information page, customers can choose to change the bill-to customer, contact, or address (assuming they have the appropriate role permissions).

2. If customers choose to change the bill-to customer, the Search and Select: Bill to Customer page is displayed, where they can search for and select a new bill-to customer.

Customers with the required user permissions can also create a new bill-to customer from the Search and Select: Bill to Customer page. In this case, the Create Customer page is displayed, where customers enter information to create the bill-to user. When finished, they return to the Checkout: Billing and Payment Information page or the Update Item Billing and Payment Information page.

3. If customers choose to change the bill-to contact, the Search and Select: Bill to Contact page is displayed, where they can search for and select a new bill-to contact.

Customers with the required user permissions can also create a bill-to contact from the Search and Select: Bill to Contact page. In this case, the Create Contact page is displayed. When finished, they return to the Checkout: Billing and Payment Information page or the Update Item Billing and Payment Information page.

4. If customers choose to change the bill-to address, the Search and Select: Bill to Address page is displayed, where they can search for and select a new bill-to address.

If customers choose to create a bill-to address from the Search and Select: Bill to Address page, the Create Address page is displayed. When finished, they return to the Checkout: Billing and Payment Information page or the Update Item Billing and Payment Information page.

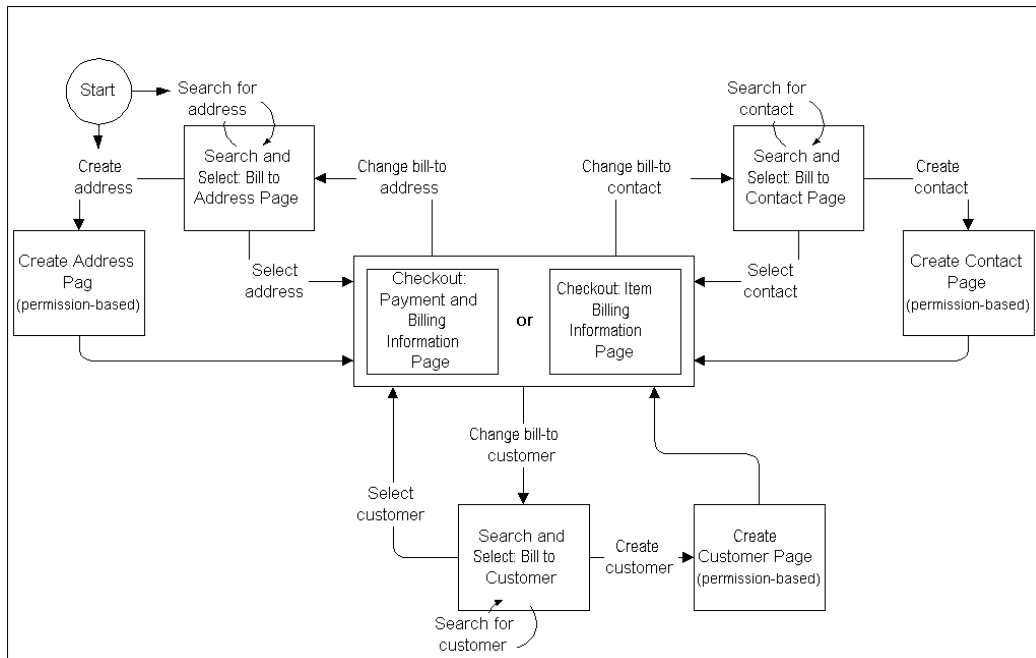
If customers do not have the IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, the primary bill-to address is displayed. Customers cannot select an alternate bill-to address.

5. Customers continue to the next page in the checkout flow. See the "High-Level Process Flow for B2B Checkout" above, for the options available within the checkout flow.

For permissions details, see the chapter, Implementing Carts and Orders, page 13-1, and the appendix, Seeded User Data, page B-1.

The following diagram illustrates this flow.

Process Flow for B2B Billing Information



Bill to Multiple Locations Process Flow

During checkout, B2B customers can enter separate billing information for different items in their shopping carts, if this functionality has been enabled (see the section, "Setting up Item-Level Billing", in the chapter, Implementing Payment Types and Shipping Methods, page 12-1).

Note: Payment type must be Cash or Invoice to use item-level billing. Also, when using line level billing, Purchase Order is not supported.

1. B2B customers can enter separate billing information for different items in their shopping carts by accessing the Bill to Multiple Locations area of the Checkout: Billing and Payment Information page, B2B customers can enter separate billing information for different items in their shopping carts, if this functionality has been enabled.
2. If a customer has ordered more than one quantity of a single item, the items can be split to specify different billing information for each duplicate item. From the Bill to Multiple Locations area of the Checkout: Billing and Payment Information page, customers select the Split Quantity icon to retrieve the Split Quantity page. In the Split Quantity page, customers separate the quantities onto separate lines. When they finish splitting the line items, they return to the Checkout: Billing and Payment Information page, with the items split into different rows in the Bill to Multiple Locations area of the page. From this area, customers select items to modify, as

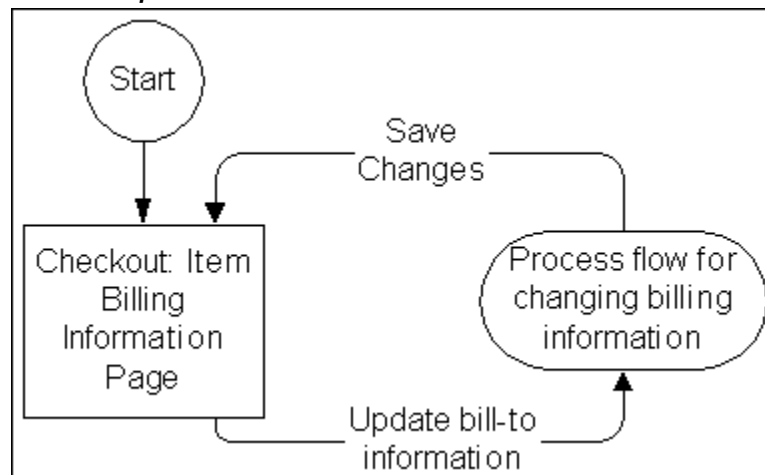
described below.

3. To update the billing details of a specific item, customers select the item and press the Update Billing Information button; this retrieves the Update Billing and Payment Information page for the selected item. From the update page, users can change/create bill-to customer, contact, and address (assuming the update/create bill-to permissions are in their user roles).
4. When finished changing item-level billing information, the customer returns to the Checkout: Billing and Payment Information page, where they continue with checkout.

If the user does not have the IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS permission, the primary bill to address is displayed. The user cannot select an alternate bill to address.

The following diagram shows the flow.

Bill to Multiple Locations Process Flow



Process Flow for B2C Checkout

B2C customers who are ready to place their orders go to the checkout area of the site, where they enter shipping and payment information.

1. When a B2C customer chooses to check out, the Checkout: Shipping and Billing page is the first checkout page displayed. The customer chooses a shipping method, and can either select an existing shipping address or add a new address. Users also can enter shipping instructions, if this functionality has been enabled (see the section, "Allowing Users to Enter Shipping Information", in the chapter, Implementing Payment Types and Shipping Methods, page 12-1).

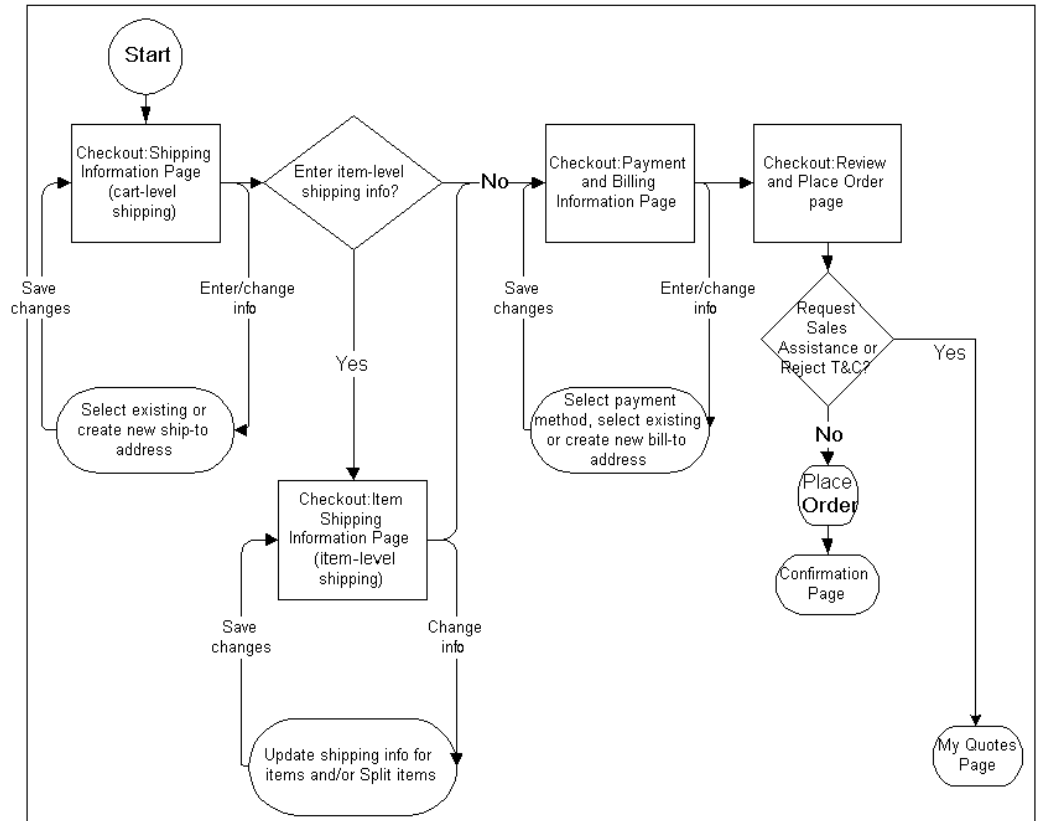
2. Customers can choose separate shipping details for different items in their carts after selecting the *Need to ship to multiple addresses?* link. If they choose to use item-level shipping, the Ship to Multiple Addresses page is displayed.
3. In the Ship to Multiple Addresses page, customers can update an item's shipping details by selecting the item and pressing the Update Shipping Details button. This retrieves the Update Item Shipping Information page for the selected item. From this page they can enter different shipping information for the cart items.
4. If customers have entered more than one quantity for a single item in their carts, they can split the quantities to enter different shipping information for each one. They do this by pressing the Split Quantity icon from the Update Item Shipping Information page.
5. Once finished entering shipping information, customers return to the Checkout: Shipping and Billing page.
6. In the billing area of the Checkout: Shipping and Billing page, customers select a billing address and select a payment method.
7. Next, customers proceed to the Checkout: Terms and Conditions page (if this feature is enabled), where they agree to the terms and conditions of the order. Customers can reject terms and conditions as well; for information about rejecting terms and conditions, see the chapter, *Implementing Carts and Orders*, page 13-1.
8. After customers agree with the terms and conditions, the Checkout: Review and Place Order page displays. From the review page, customers can update quantities, as well as change payment and shipping information.
9. In the Checkout: Review and Place Order page, customers place the order by selecting the Place Order button.
10. After placing the order, customers can select Continue Shopping to browse the specialty sites and potentially add more items to shopping carts.

From the cart or checkout pages, customers can request Sales Assistance, if implemented. If customers request sales representative assistance, they must select a reason for requesting assistance and optionally enter comments in the *How can we assist you in finalizing your order?* page. If the cart is unsaved, the user must enter a cart name. After submission, the cart becomes a quote on the My Quotes page.

See also: "Checkout Flow Pages" in the chapter, *Implementing Carts and Orders*, page 13-1

The following diagram shows this flow.

Process Flow for B2C Checkout



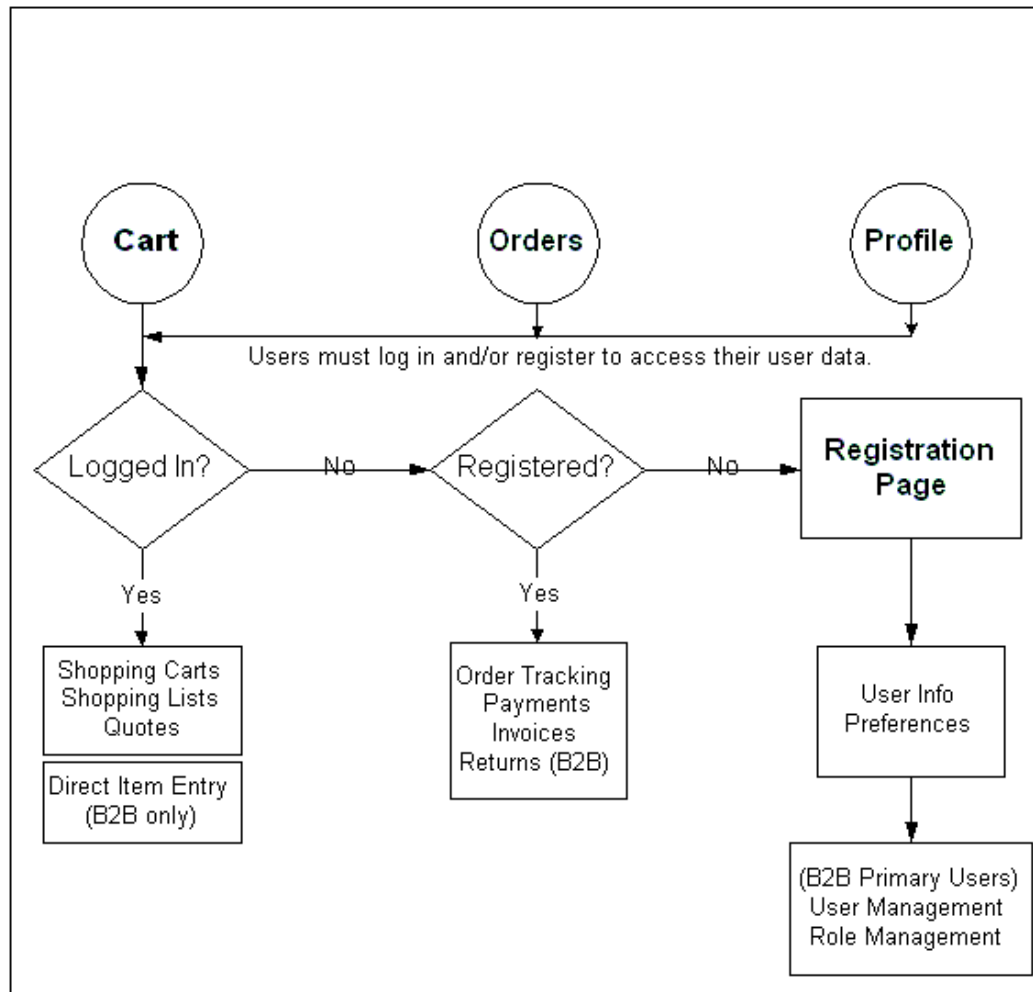
Process Flow for User Account

Customers can select the Profile, Orders, or Cart icons from any page to update their information, check on orders and invoices, work with shopping carts and shopping lists, or directly enter an item to purchase.

1. Within the account menu, users can select the Cart icon to view their shopping carts and quotes; B2B users can use Direct Item Entry.
2. Users can select the Orders icon to view information about their orders, such as payment information and shipment tracking. See Process Flow for Order Tracker to view the expanded diagram.
3. Selecting the Profile icon takes users to user information and the personal information page. See Process Flow for User Profile to view the expanded diagram.
4. B2B primary users can access the Administration menu where they can create and maintain other users for their organizations.

The following diagram shows the flow.

Process Flow for User Account



Process Flow for User Profile

B2B and B2C customers manage their own personal, address, and payment information using the Profile menu in the Customer Application. Note that the following flow covers the non-administrative user flow and assumes no other application integrations. No organization information is included in the B2B flow.

When customers select the Profile icon to edit their information, the My Profile subtab provides links to the following:

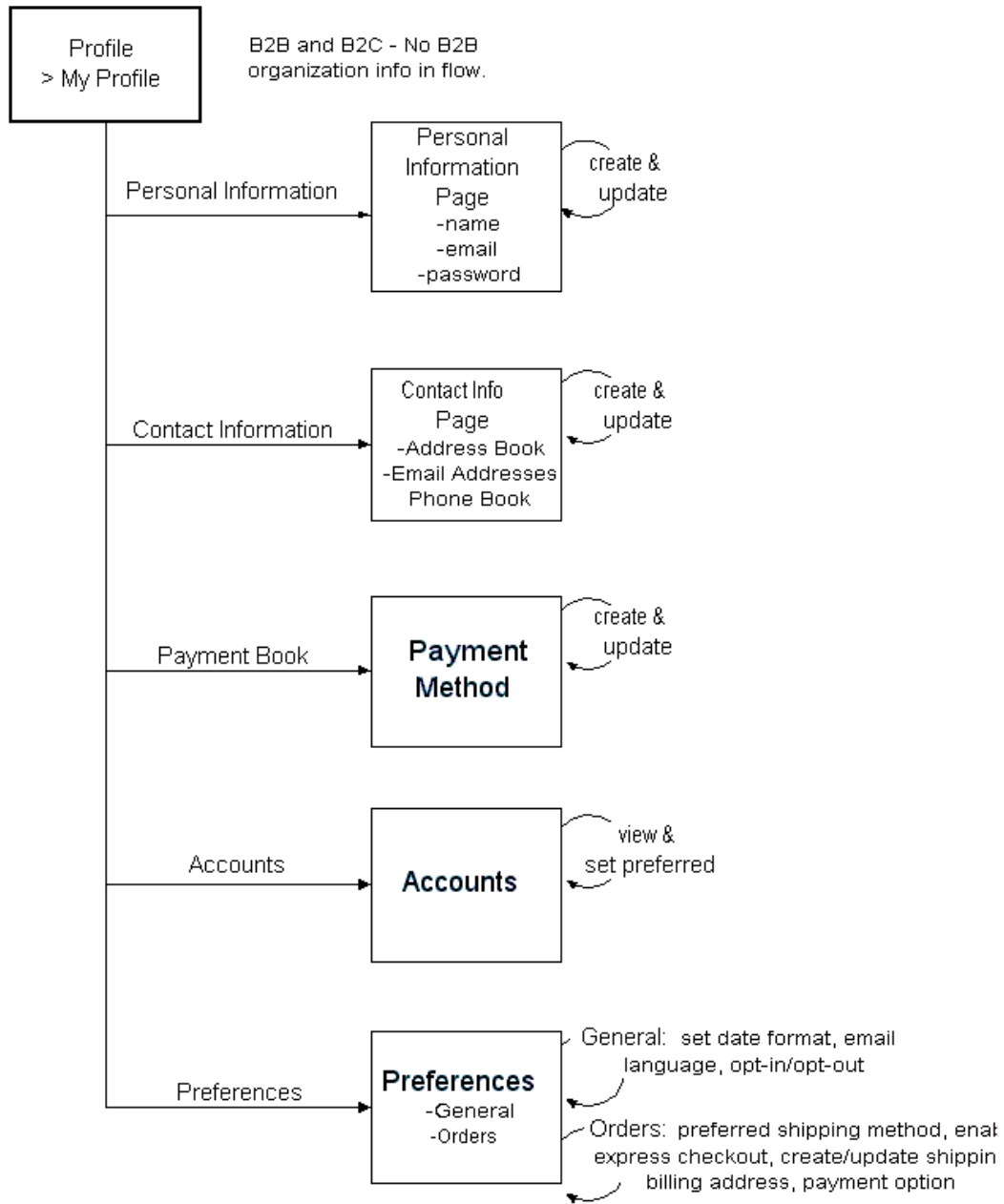
1. **Personal Information Page:** Customers can enter/change their personal information, such as name, default e-mail address, and password.
2. **Address Book Page:** Customers can enter/change their addresses (Address Book link) to be used during checkout, and set an address as the primary address to use

when shopping. They also can store e-mail addresses (Email Addresses link) and phone numbers (Phone Book link).

3. Customers can enter/change their addresses (Address Book link), e-mail addresses (Email Addresses link), and phone numbers (Phone Book link).
4. **Payment Book Page:** Users can store credit cards to be used when ordering, and can mark a single credit card as the preferred one.
5. **Accounts Page:** Users can view available accounts and set the preferred account.
6. **Preferences Page:** In the General page, users can set preferred date format, preferred e-mail delivery language, and opt-in/opt-out of marketing communications. In the Orders page, users can: set preferred shipping method for order; enable their accounts for Express Checkout (if Express Checkout is enabled by the administrator); and set up shipping, billing, and payment information for their Express Checkout orders.

The following diagram shows the flow.

Process Flow for User Profile



Process Flow for Order Tracker

Customers can select the Orders icon to review their orders, invoices, payments, and returns.

1. Customers choose the Orders icon, and the Orders page displays summarized

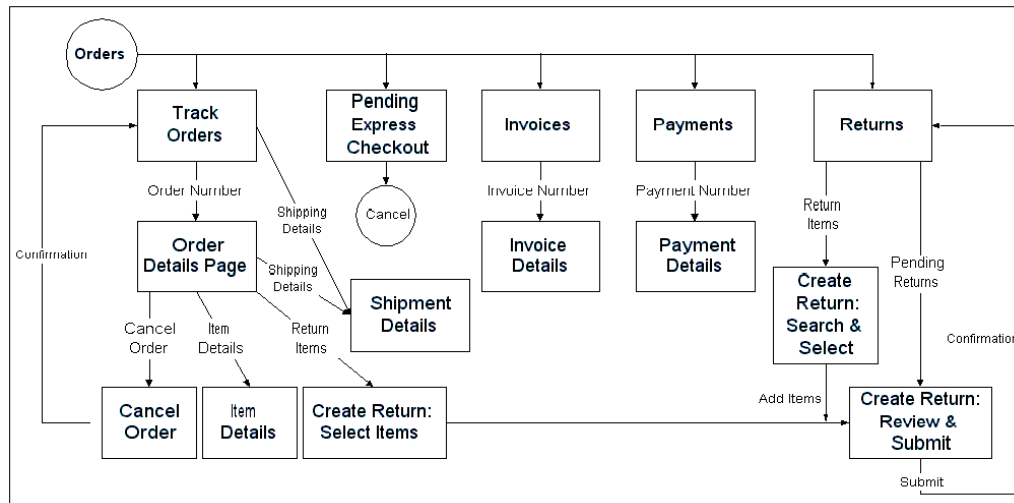
information about their orders. From the Orders page, customers can select an order number hyperlink to access the Order Details page. Customers also can select the Shipping Details icon to view the Shipment Details page.

2. If Express Checkout is enabled, customers select Pending Orders to view a list of Express Checkout orders that have not yet been submitted. From the Pending Express Checkout Orders page, customers can select the Item Details icon to view details of the items in the queue, including shipping and billing information for the items. If the orders have not yet been submitted, the user can press Cancel Order to cancel an order.
3. Customers choose Invoices to view a list of their invoices, with payment and order information. Customers can select an invoice number hyperlink to view details of a particular invoice. Customers can select the Payment Details icon to access the Payment Details page.
4. Customers choose Payments to view a summary of recent payments, or a payment number hyperlink to view details of a particular payment in the Payment Details page.
5. Customers select Returns to view a list of their submitted returns. From the Returns page, customers can access the Pending Returns page or create a new return.

For more information about the activities that can be performed from these pages, see "Orders and Related Pages" in the chapter, Implementing Carts and Orders, page 13-1.

The following diagram illustrates the flow.

Process Flow for Order Tracker



Sample User Registration Flows

This section contains the following user registration flows:

- Individual User Registration
- Business User Registration - New Organization
- Business User Registration - Existing Organization
- Registration in Combined Store-Support-Partner Implementation

Also see the sample registration flows in the "Integrating Oracle iStore with Oracle iSupport" and "Integrating Oracle iStore with Oracle Partner Management" chapters.

Note: The registration pages are not displayed in a specific site context, since the target page of the registration depends on the selected user type and related responsibilities.

Individual User Registration

Following is a sample registration flow for individual users (B2C users). This flow assumes B2C users are automatically approved.

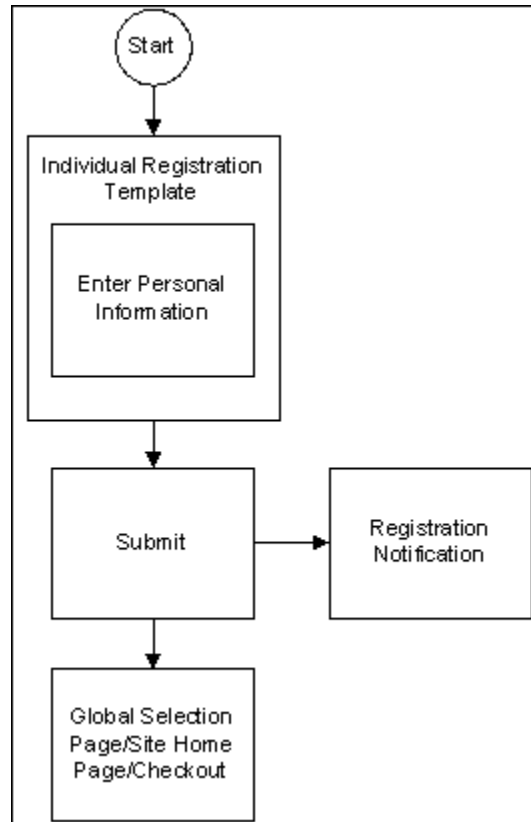
In the case of Oracle iSupport integration, the flow is the same, except that new users should be awarded Oracle iStore and Oracle iSupport individual user roles and responsibility.

1. From the Registration page, user selects the hyperlink to register as an individual user.

2. The user enters required information.
3. The user selects *Send me marketing communications* checkbox or not.
4. The user submits the registration form.
5. The user receives an e-mail notification with username and password information.

The following diagram depicts the flow.

Individual (B2C) User Registration Flow



Business User Registration - New Organization

Following is a sample registration flow for business users (B2B users) whose organizations have not yet been registered. Typically, the first person to register his organization is considered the primary user and is charged with user management for business users within his organization. This flow assumes that the user will be automatically approved.

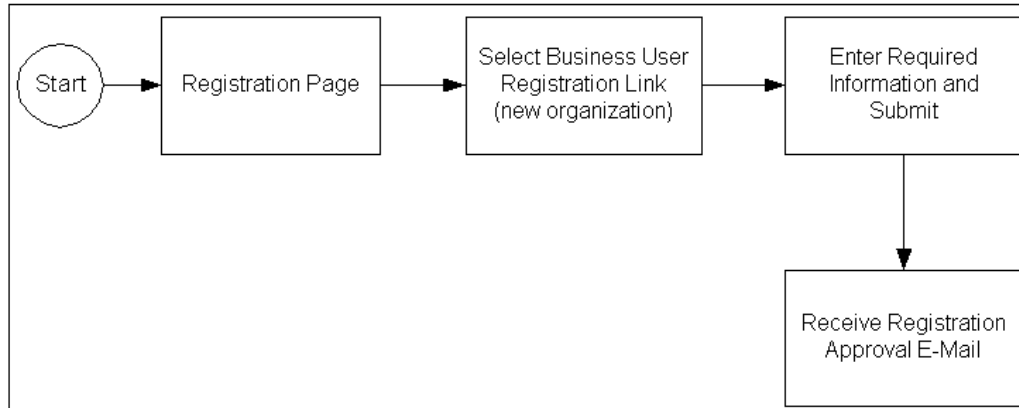
In the case of Oracle iSupport integration, the flow is the same, except that new users should be awarded Oracle iStore and Oracle iSupport primary business user roles and responsibility.

In case of Oracle Partner Management integration, the user would select the Oracle Partner Management link, *Register as a partner*.

1. The user accesses the Registration page and selects the link to register as the first user of an organization.
2. The user enters required information.
3. The user submits the registration.
4. The user receives an e-mail notification that his registration has been approved. He can access the Profile > Organization Information area of the Customer UI to view his Organization ID/Registry ID and communicate it to other users.

The following diagram depicts the flow.

Business User (B2B) Registration Flow - New Organization



Business User Registration - Existing Organization

Following is the registration flow for business users (B2B users) whose organization has already been registered. This flow assumes that a primary user must approve the B2B user's registration.

In the case of Oracle iSupport integration, the flow is the same, except that new users should be awarded Oracle iStore and Oracle iSupport business user roles and responsibility.

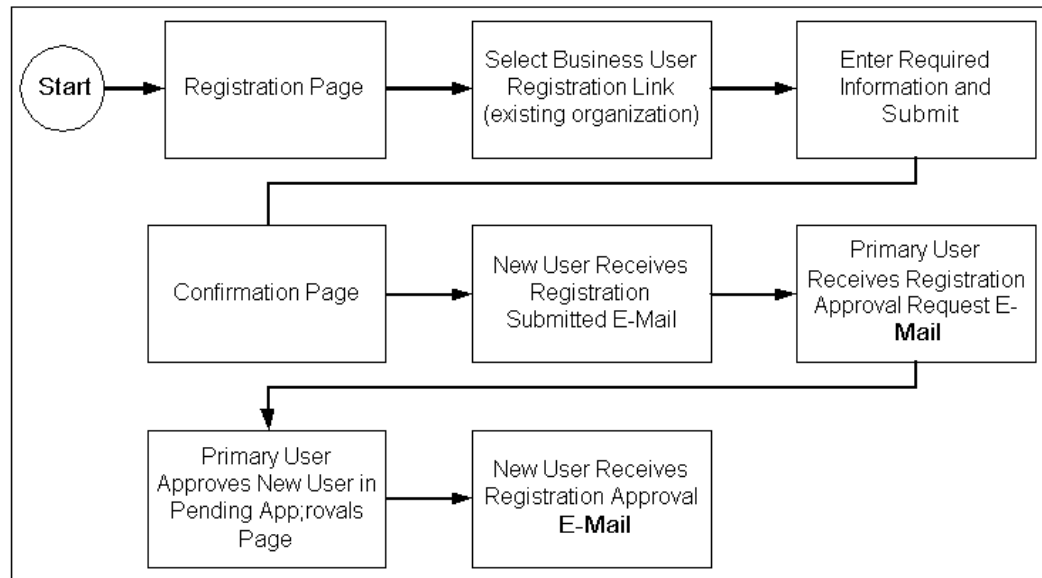
In case of Oracle Partner Management integration, the user would select the Oracle Partner Management link, *Register as a user of an existing partner*.

1. The non-primary user accesses the Registration page and selects the link to register as user of an existing organization. The user should know his Organization ID/Registry ID before beginning registration.

2. The user enters required information, including Organization ID/Registry ID.
3. The user submits the registration.
4. The user receives an e-mail notification that his registration request has been submitted.
5. The primary user receives an e-mail notification that a self-registered user asked for approval.
6. The primary user approves the registration.
7. The non-primary user receives a notification that his registration is approved.

The following diagram depicts the flow.

Business User (B2B) Registration Flow - Existing Organization



Registration in Combined Store-Support-Partner Implementation

Following is a sample registration flow a common implementation of Oracle iStore, Oracle iSupport, and Oracle Partner Management using Oracle iStore framework.

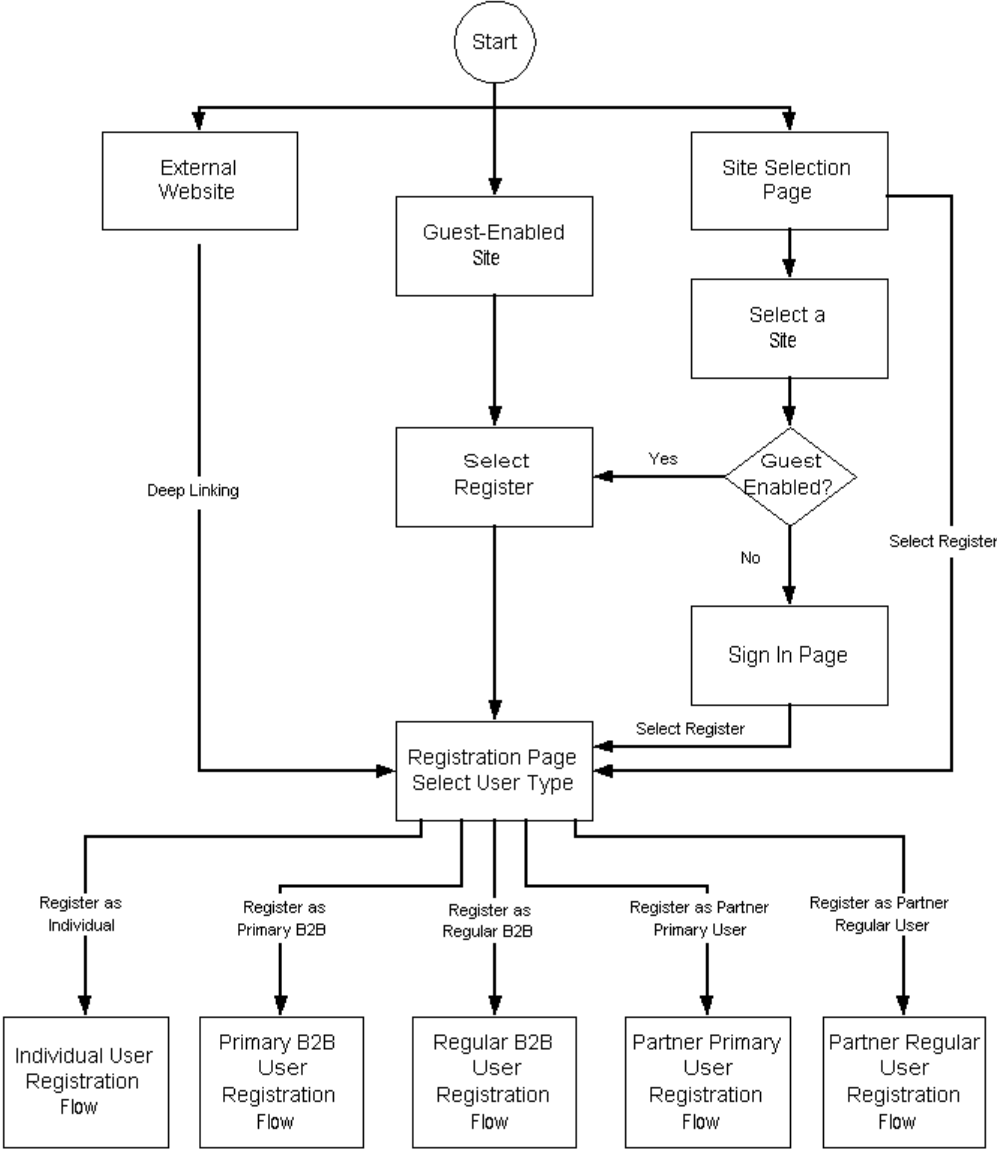
1. The user arrives at the registration page through one of the following paths:
 - From an external website, the user selects a deep link to the registration page.
 - The user navigates to the Site Selection Page and selects a site. If the site allows guest users, he is taken to the Site Home Page and can select the Register icon. If

the site does not allow guest users, he is taken to the login page, and from there can select the Register icon.

- The user navigates to the Site Selection Page and selects the Register icon.
 - The user accesses a site which allows guest users and selects the Register icon.
2. From the Registration page, the user selects the appropriate user type for which he is registering. Depending upon his user type selection, he follows one of the following registration flows:
- Individual user
 - Primary business user
 - Non-primary business user
 - Partner primary business user
 - Partner non-primary business user

The following diagram depicts the flow.

Registration in Implementation of Oracle iStore-iSupport-Partner Management



Profile Options

This appendix covers the following topics:

- Overview of Profile Options Appendix
- Oracle CRM Technology Foundation Profile Options
- Concurrent Program Manager Profile Options
- Site Administration UI Setup Profile Options
- Customer UI Mandatory Setup Profile Options
- Other Customer UI Profile Options
- Customer UI Pricing Profile Options
- Customer UI Product Search Profile Options
- Lead Import Profile Options
- Oracle Workflow (E-mail Notifications) Integration Profile Options
- Caching and SSL Profile Options
- Oracle Order Capture/Oracle Quoting Integration Profile Options and Parameters
- Oracle Configurator/Bills of Material Integration Profile Options
- Oracle Content Manager Integration Profile Options
- Oracle Marketing Integration Profile Options
- Unsupported Profile Options

Overview of Profile Options Appendix

This chapter describes profile option settings that are required for successful implementation and administration of Oracle iStore. See *Oracle E-Business Suite Setup Guide* for general information about setting profile options.

Important: Be sure to bounce the middle-tier server after setting server-level and site-level profile options.

Oracle CRM Technology Foundation Profile Options

This section summarizes the Oracle CRM Technology Foundation profile options that you need to set when implementing Oracle iStore.

Foundation Profile Options for HTML UI Setup

Set the profile options in this section at the following levels:

- Site
- Application—iStore (where noted)

JTF_PROFILE_DEFAULT_APPLICATION

Specifies the default application ID. Set to 671 for Oracle iStore.

JTF_PROFILE_DEFAULT_BLANK_ROWS

Specifies the number of blank rows on Site Administration UI forms. Can be set to any integer greater than zero.

JTF_PROFILE_DEFAULT_CSS

Specifies the default Oracle CRM Technology Foundation Cascading Style Sheet. Set to jtfucss.css.

JTF_PROFILE_DEFAULT_CURRENCY

Specifies the default currency. Enter the currency code in all uppercase letters. USD = U.S. Dollars.

JTF_PROFILE_DEFAULT_NUM_ROWS

Specifies the default number of rows to display in tables. Can be set to any integer greater than zero.

JTF_PROFILE_DEFAULT_RESPONSIBILITY

Specifies the default responsibility for the Site Administration UI. Set to 21819 for the iStore Administrator responsibility. Set at iStore application level only.

Foundation Profile Options for iStore Administrator User

Set the profile options in this section at the following levels:

- User—Site administrator/manager user name

JTF_PROFILE_DEFAULT_APPLICATION

Specifies the default application ID. Set to 671 for Oracle iStore.

JTF_PROFILE_DEFAULT_RESPONSIBILITY

Specifies the default responsibility for the Site Administration UI. Set to 21819 for the iStore Administrator responsibility.

Foundation Profile Options for Guest User

Set the profile options in this section at the user level to the guest user name.

JTF_PROFILE_DEFAULT_APPLICATION

Specifies the default application ID. Set to 671 for Oracle iStore.

JTF_PROFILE_DEFAULT_RESPONSIBILITY

Specifies the default responsibility for the guest user's responsibility. Set to 22372 for the IBE_CUSTOMER responsibility.

Concurrent Program Manager Profile Options

Set the following profile options at responsibility level to the iStore Concurrent Programs Responsibility and any other Oracle iStore concurrent program manager responsibility being used. Generally, set the same profile option values for the iStore Concurrent Programs Responsibility as for the IBE_CUSTOMER responsibility. In a multiple operating unit environment, the concurrent program manager responsibility's profile option values should match the customer responsibility's profile option values for each operating unit.

- ASO: Validate Salesrep -- Set to No.

Site Administration UI Setup Profile Options

Set the profile options in this section at the iStore application level, unless otherwise directed.

IBE: Autogenerate Password

This profile option enables primary users or administrators to have the iStore password automatically generated when defining new iStore users. When this profile option is set to Yes, iStore automatically generates a password for a new user. The system sends an email notification to the user with the login and password information.

IBE: Category Set

This profile is used in:

- Category-based product search in Site Administration UI.
- Determining the default item display style if no item-level display is mapped in

Customer UI.

- Defining product relationship rules between category to product, category to section, or category to category.

Mandatory profile option. Set at iStore application level to the primary display category set.

IBE: Enable Display Style

Specifies whether Display Styles functionality shows up in the Site Administration UI. If set to Yes, Display Styles can be selected in the Display Templates pages for Products and Sections; also, new Display Styles can be created in the Template Manager subtab within the Advanced tab. If set to No, the functionality is not available. Default value = Null. Null is treated as No.

IBE: Enable Links In Error Messages

Specifies that the error messages displayed on the iStore application pages have a hyperlink that helps the user to navigate to the exact location of the error.

When set to "YES", the hyperlink is available along with the error message when possible which helps to locate errors easier; however, not all error messages will have a hyperlink.

IBE: Item Validation Organization

Specifies the Inventory Organization where your sites' products reside.

Mandatory profile option. Recommended value: Master Inventory Organization, unless you are implementing multiple organizations; in that case, see: the chapter, "Implementing Globalization with Oracle iStore". If integrating with Oracle Marketing's Products module, see the chapter, "Integrating Oracle iStore with Oracle Marketing".

IBE: Use Database for Media Storage

Enables/disables file upload functionality in the Content tab of the Site Administration UI. Yes = Upload functionality available. No = Upload Functionality not available. Default = No. Set at site level. See the "Implementing Content" chapter for more information about this profile option.

Note: The profile options IBE: Use Content Management Integration and IBE: Use Database for Media Storage should be set to "Yes" since integration with Oracle Content Manager is mandatory.

IBE: Use Display Order Feature

Specifies whether you can manually order the display of specialty sites in the Site Selection Page. If set to Yes, you can determine the specialty site order using the Sites: Display Order page in the Site Administration UI. If set to No, specialty sites will be arranged in case-insensitive, alphabetical order at runtime. Default = Yes. Can be set at site and application levels. Note that Oracle iStore does not support setting different

levels for this profile option at site and application level. If you have set this profile option at application level, it is recommended that you unset the application-level setting and set the profile at site level.

Customer UI Mandatory Setup Profile Options

Set the following mandatory IBE profile options for the Customer UI. Set the profile options in this section at the iStore application level, unless otherwise specified.

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

ASO: Automatic Numbering

Necessary for placing orders in Oracle Order Management. Set to Yes at site and responsibility levels.

ASO: Credit Card Authorization

When used with ASO: Default Order State, specifies whether credit card authorization occurs at the Entered or Booked stage. Possible values: Yes/No. Default = Null (treated as No).

ASO: Default Order State

Specifies the default order state. Possible values: Booked/Entered. Recommended value = Booked.

ASO: Default Quote Status

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

ASO: Enable TCA Changes

Required for address validation in the Trading Community Architecture schema. It is used, for example, when a user attempts to split billing and shipping contacts in the Customer UI. Set to Yes.

ASO: OM Defaulting

Determines whether OM uses default values for certain cart attributes if null values are passed. See the section, "Setting up Oracle Order Management", in the chapter, *Verify Mandatory Dependencies*, page 2-1, for more information.

IBE: Create Order in Entered State, if it has errors while booking

Specifies if an order should be created in the Entered state even if there are errors while booking it. Possible values - Yes/No. Set to Yes. Default = No.

IBE: Default Payment Term

Set to the payment term that will be the default payment term for orders. Payment terms are set in Oracle Receivables. See *Oracle Receivables User Guide* for more information.

IBE: Pricing Event--Before Shopping Cart

Specifies the user-defined pricing event (defined in Pricing) for the catalog stage. Set to `Enter Order Line`. If integrating with Oracle iSupport or Oracle Partner Management, set at the respective application's application level.

IBE: Pricing Event for Shopping Cart

Specifies the pricing event for processing the shopping cart price in Oracle Pricing. You must set the profile option to `Batch Processing` to ensure that the price lists, modifiers, discounts, promotion codes, and surcharges are applied correctly at both header and line level. If integrating with Oracle iSupport or Oracle Partner Management, set at the respective application's application level.

MO: Operating Unit

Specifies the operating unit against which Customer UI users place orders. The user can only view and purchase items that are in the Inventory Organization associated with this operating unit. Set to the default operating unit at the customer responsibility level.

Sequential Numbering

Without this profile, a customer cannot place orders in the sites. (The name of this profile option has no product code prefix.) Set to `Always Used` at site level. The value can also be `Partially Used`. You also need to set this profile option at the responsibility level, if you are using different responsibilities than `IBE_CUSTOMER` in the site definition. See the *Oracle E-Business Suite Maintenance Guide* for more information on this profile option.

Other Customer UI Profile Options

All of these profile options are optional. Set at iStore application level unless otherwise directed.

IBE: Active Cart Expiration Duration (# days)

Specifies the number of days that customers can access active shopping carts before they expire. The expiration date is calculated from the last update date of the cart, and carts expire at the end of the day they on which they are scheduled to expire. Default value: 30. Set to any integer.

IBE: Additional Shopping Cart Information

Enables/disables Additional Information link and related functionality in the Your Shopping Cart page. The Additional Information section captures information from the customer via descriptive flexfields. Possible values: Yes/No. Default value: No. Can be set at application or responsibility levels.

IBE: Additional Table Rows

Determines the number of rows to add when a user selects the Add More Rows button in the Direct Item Entry form in the Customer UI. Default value: 1. Set to an integer.

If not set, this profile defaults to 1. It can be set at the site, application, and responsibility levels. If set to 0, the Add Rows button is not displayed.

IBE: Attachment Document Category

Necessary for allowing B2B customers to attach files to shopping carts. Recommended value: Miscellaneous at iStore application level. Default value: Null. Ensure that the user has the IBE_USE_ATTACHMENTS permission in his user role. B2C users do not have access to the attachments functionality.

IBE: Autoquery Install Base for B2C User

For B2C users only, specifies whether search criteria or an autoquery is performed in the My Products page in Order Tracker. Possible values: Yes/No. Default value: Yes. Can be set at site, application, and responsibility levels.

IBE: Add To Cart Navigation

This profile option controls the user navigation when the user clicks on the Add to Cart button or the Add To Cart button with drop-down menu across the iStore application. The value of this profile option allows the iStore user to either navigate to the Shopping Cart page or remain on the Current Product Catalog page. By default, this profile option is set to Blank. The system administrator can set this profile option value either to the Shopping Cart Page or the Current Page at the Application and Responsibility level only.

The IBE: Add To Cart Navigation profile controls the behavior of each Add to Cart button in the iStore application.

The profile option values are the Current Page, the Shopping Cart Page and Blank (NULL).

Note: The following iStore templates include the Add To Cart Navigation feature:

- Single Selection Template: ibeCCtdFSubSctI.jsp
- Multiple Selection Templates: ibeCCtdFSuStMs2I.jsp and ibeCCtdFSuStMs3I.jsp
- Item Details Templates: ibeCCtdAddItemBin.jsp, ibeCCndSvaSvcList.jsp, ibeCCtdItemDetail.jsp, ibeCCtdItemDtlNoImg.jsp, ibeCCtdSvaltmDtl.jsp, and ibeCCtdSvcltmList.jsp
- Shopping Cart Page: ibeCScdViewA.jsp
- Welcome Bin: ibeCAcdWelcome.jsp

IBE: Cart Retrieval By Number For B2B

Required for shared cart backward compatibility purposes; enables a textbox (labelled Cart Retrieval Number) in the My Carts page (for B2B users only). Possible values: Yes/No. Default value: No. Set at IBE_CUSTOMER (or applicable customer responsibility) responsibility level. Also can be set at application and site levels.

IBE: Default Order Type

This profile allows the system administrator to specify the order type when an order is created. This profile option can be set at the user, application, and site level. If the profile option value is set to Yes, the value specified by the user defines the default order type when an iStore end user creates an order or a shopping cart to place an order. When the profile option is not set, the value for the Oracle Quoting parameter Default Order Type is used instead.

IBE: Default Specialty Site

Specifies the default specialty site, and is used to route Customer UI users directly to Site Home Page for the site specified in the profile. For value, enter the Site Name of the applicable site. Internally, the profile finds Site ID. Default value: Null.

Note: Only in the following two cases will the page flow will route Customer UI users directly to the Site Home Page for the site specified in this profile:

- When user tries to access the home page without specifying the site ID in the URL, and there is no site ID in the cookie.
- The Site Selection Page is disabled (the profile, IBE: Use Specialty Site Selection Page, is set to No).

IBE: Default User Email Style

This profile allows the System Administrator to specify the default Email Style to be used when iStore sends notifications. This profile option determines the initial delivery format style of the Email notifications being sent to iStore users as defined by the iStore merchant. By default, the profile option for IBE: Default User Email Style is set to Text, and the iStore merchant can change this to a different style so that iStore users will receive Email notifications in a different display format style as a default. iStore users can then change this setting in their contact information profile to a different Email format style. The value of this profile option can be set at the Site, Application, and Responsibility levels. Possible values are: Plain text mail, Plain text mail with HTML attachments, HTML mail, and HTML mail with attachments.

IBE: Display End Customer Information

Specifies whether the Checkout: End Customer Information page displays in the checkout flow. Possible values: Yes, No, and Null. Default value: No. Set to Yes to enable the page. See also: IBE: Mandate End Customer and IBE: Mandate End Customer Contact.

IBE: Display Option Classes in the Shopping Cart & Order Tracker

Specifies whether option classes are displayed in the shopping cart, in Order Tracker, and in e-mail notifications. Possible values: Yes/No. Default value: Null. If Yes or Null, option classes are displayed. If No, option class children are displayed as direct children of the option class parent. Can be set at application, site, and responsibility levels.

IBE: Enable Debug

Specifies whether user-specific logging is available for the JSP/Java and PL/SQL layers. Set to Yes to activate user-specific logging. Default value: No. Set at user level only. If you set this profile to Yes for a user, verify or set OM: Debug Log Directory at site level to a directory that is writable by the database server. Oracle iStore Customer UI user-specific logs for the PL/SQL layer are written in this directory.

IBE: Enable Invoices in Order Tracker

Specifies whether the Invoices subtab is displayed in Order Tracker. Possible values: Yes/No. Default value: Yes.

IBE: Enable Multiple Services

If set to Yes, customers can add multiple services to a single serviceable item. If set to No, Oracle iStore will replace an existing service when another service is selected. Possible values: Yes/No. Default value: No at site level. Can be set at site or responsibility levels.

Important: If your implementation consists of several sites within one organization (causing one user to be able to access the same cart from different sites), then as a best practice you should set the profile option at the responsibility level to the same value for each supported responsibility within the organization.

IBE: Enable Order Cancellation in Order Tracker

Specifies whether registered users can cancel their orders using Order Tracker. B2B users must have the IBE_CANCEL_ORDER permission to have access to the functionality. Possible values: Yes/No. Default value: No, at iStore application level; no value at responsibility level. Can be set at application and responsibility levels.

IBE: Enable Order Tracker Global Icon

Enables/disables the Orders navigation icon in the Customer UI. Default value: Yes, at site level. Also can be set at application and responsibility levels.

IBE: Enable Payments in Order Tracker

Specifies whether the Payments subtab is displayed in Order Tracker. Possible values: Yes/No. Default value: Yes.

IBE: Enable Pay Now

Specifies whether pay now/pay later totals are displayed in the shopping cart and in the order review page. Possible values: Yes/No. Default value: No. Can be set at application, site and responsibility levels. This profile option should be set to Yes only if the OM system parameter, Installment Options, is set to Enable Pay Now. Note that the amount to be authorized is not controlled by this iStore profile; This profile only controls the user interface. The authorized amount is based on OM system

parameter, Installment Options.

IBE: Enable Recurring Charges

Specifies whether recurring charges are displayed in the shopping cart and in the order review page. Possible values: Yes/No. Default value: No. Can be set at application, site and responsibility levels. This profile option should be to Yes only if the Order Management Recurring Charge system parameter is set to Yes. Note that the amount to be authorized is not controlled by this iStore profile; This profile only controls the user interface. The authorized amount is based on OM system parameter, Installment Options.

IBE: Enable Return Pre-booking Approval

Used to enable return pre-booking approval feature. Can be set to Yes, provided you have Order Management Release 11.5.10 or later release installed. If not, leave the profile option set to No. Possible values: Yes/No. Default value: No.

IBE: Enable Return Policy

Used to enable return policy constraints for determining whether an item can be returned or not (i.e., to determine the value of the Item Returnable column in the Select Items page). If set to Yes, each order line is checked through Oracle Order Management's Processing Constraints, which determine whether or not the order line can be returned by the user. Set to Yes only if implementing additional processing constraints for return policies. Possible values: Yes/No. Default value: No. Can be set at site or responsibility level.

Note: If you are not implementing return policies, this profile should be set to No, and the return policies should be deleted from the Oracle Order Management's Processing Constraints.

IBE: Enable Shopping Cart Global Icon

Specifies whether the Cart navigation icon displays. Possible values: Yes/No. Default value: Yes, at site level. Also can be set at application and responsibility levels.

IBE: Enable Shopping List Management

This profile option enables one-click shopping list management and controls the display of the Add To Cart button or the Add To Cart button with drop-down menu. The Add to Cart button with drop-down menu is displayed, when the IBE: Enable Shopping List Management profile option is set to Yes. By default, this profile option is set to Blank. The system administrator can set this profile option value to Yes at the site level only.

The profile option values are Yes, No, and Blank (NULL).

IBE: Enable Product Details Pop-up Dialog

This profile option controls the display of item detail pop-up information. If you set this profile to Yes, then the Item Details icon is displayed. By default, this profile is set to No. The system administrator can set this profile option value to Yes at the site level only.

The profile option values are Yes, No, and Blank (NULL).

Note: The following iStore templates include the Product Details Pop-up Dialog feature:

- Single Selection Template: ibeCCtdFSubSctI.jsp
- Multiple Selection Templates: ibeCCtdFSuStMs2I.jsp and ibeCCtdFSuStMs3I.jsp
- Item Details Templates: ibeCCtdAddItemBin.jsp, ibeCCndSvaSvcList.jsp, ibeCCtdItemDetail.jsp, ibeCCtdItemDtlNoImg.jsp, ibeCCtdSvaItmDtl.jsp, and ibeCCtdSvcItmList.jsp
- Shopping Cart Page: ibeCScdViewA.jsp

IBE: Enforce Terms and Conditions Review by User

Specifies whether customers must view the T&Cs of a shopping cart or quote before submitting the order. Possible values: Yes/No. Default value: No. Can be set only at iStore application level.

IBE: Express Checkout Consolidation Time Interval

Specifies the time interval (in minutes) in which Express Checkout carts are available to be added to before being submitted by the concurrent program, iStore - Express Checkout Order Submission. Default value: 60. Set to an integer. Can be affected by the scheduled running of the concurrent program. For example, if the available time interval is set to 60 minutes, and the concurrent program runs every 45 minutes, an express checkout cart would be submitted on the second run of the concurrent program; but, for example, if the concurrent program is set to run every 120 minutes, it will be submitted on the first run.

IBE: Items Per Page for Display

Specifies number of items to display in leaf sections (the ending sections of a node) of the section hierarchy. Default value: 20. Set to an integer.

IBE: Items Per Section for Display

Specifies the maximum number of items to display per section. If no value is set, all items in a section will display. Default value: Null. Set to an integer.

IBE: Lines Per Section for Multiple Section Display

Specifies the number of items to display per section when multiple sections display on page. Default value: Null. Set to an integer. If no value is set, IBE: Items Per Page for Display is used.

IBE: Mandate Contacts For Billing and Shipping

Specifies whether B2B users must enter contact information before order submission. Yes = User must enter information; No: Optional for user. Default value: No.

IBE: Mandate End Customer

Specifies if it is mandatory for the B2B or partner user to select end customer data in the checkout flow. Yes: User must select end customer data in checkout flow; No: Optional for user. Default value: No. Possible values: Yes/No/Null. Can be set at site, application, and responsibility levels.

IBE: Mandate End Customer Contact

Specifies if it is mandatory for the B2B or partner user to select end customer contact name in the checkout flow. Yes: User must select end customer data in checkout flow; No: Optional for user. Default value: No. Possible values: Yes/No/Null. Can be set at site, application, and responsibility levels. If IBE: Mandate End Customer is set to Yes, then IBE: Mandate End Customer Contact can be set to either Yes or No, based on implementation requirements. If IBE: Mandate End Customer is set to No, then IBE: Mandate End Customer Contact should not be set and will not take effect.

IBE: Mandate Contact Business Phone

Specifies whether the business telephone number is a mandatory field during the following actions: (1) When primary users create or update an organization contact in the User Management screens; (2) When a new user enters registration information for the first time (applies to registration pages for B2C, B2B, and partner users, both administrative and non-administrative users). Yes: Business telephone number is mandatory; No: number is not required. Possible values: Yes/No. Default value: No. Can be set at site, application, and responsibility levels.

IBE: Mandate Purchase Order Number

Determines whether the iStore user must fill in a value for the purchase order number field or it can be left blank. Possible values: Yes, No and Null. Default value is null. Only a system administrator can specify a value for this profile option. This profile option can be set at the Site, Application, Responsibility and User levels.

IBE: Maximum Columns in Specialty Site Page

Specifies number of columns in Site Selection page. Possible values: Any reasonable integer. Default value: 0. Can be set at site and application levels. Note that Oracle iStore does not support setting different levels for this profile option at site and application level. If you have set this profile option at application level, it is recommended that you un-set the application-level setting and set the profile at site level.

IBE: Maximum Direct Entry Rows

Sets the row limit for the Direct Item Entry form. Also sets the maximum number of items that can be uploaded via the .csv file upload capability. If undefined, the number of rows is 100. Can be set at site, application, and responsibility levels. Maximum value: 100. Default value: 100 at site level. JTF_PROFILE_DEFAULT_NUM_ROWS takes precedence over IBE: Maximum Direct Entry Rows -- if the IBE profile option is less than the JTF profile option.

IBE: Maximum Number of Products to Compare

This profile option allows the Oracle iStore Administrator to define the maximum number of products you can choose for comparison:

The Oracle iStore Administrator defines the maximum number of products that can be selected for side-by-side comparison. This profile option accepts a numeric value between 2 and 10; the default value is 5. Whenever the value of this profile option is left blank it is reset to 5. This profile option is only available at the Site Level.

IBE: Merchant DUNS Number

Used to supply the supplier's DUNS number in catalog punchout functionality. Default value: Null. Set at site level, unless the supplier has multiple DUNS numbers, then set at responsibility level.

IBE: Merge Shopping Cart Lines

Specifies whether to merge item lines in the shopping cart if the same item is added to the cart more than once. Yes: Lines are merged if duplicate; No: No line merging. Default value: No. If set to Yes, set IBE: Use Line Level Shipping to No.

IBE: Number of Invoice/Order Lines Displayed

Specifies the number of tables rows to display when users view orders, invoices, payments, and returns data in Order Tracker. Default value: 10. Set to any reasonable integer.

IBE: Number of Menu Subtabs

Specifies the number of menu subtabs in the Site Home Page. Default value: 5. Set to an integer. If you wish no subtabs to display, and no subsections to display in the Browse Bin, then you can set this profile option to zero.

IBE: Number of Menu Tabs

Specifies the number of menu tabs in the Site Home Page. Default value: 5. Set to an integer.

Warning: Note: Do not set this profile option to zero (0). Setting it to zero will cause an application error in the Customer Application.

IBE: Perform Payment Authorization in iStore

Specifies whether credit card authorization should occur in Oracle iStore or in Oracle Order Management. When set to Yes, Oracle iStore calls an Oracle Payments API to authorize the credit card. When set to No, authorization occurs in Oracle Order Management. Default value: Yes. Can be set at site, application and responsibility levels.

IBE: Profile Menu

For site management integration, allows the use of integrating applications' user profile menus in the Customer UI, after the required setup procedures have been performed. Set at site level to the integrating application's user profile menu root. If set to null, no profile menus will be displayed, and hence the profile pages will be blank. The default

menu associated to this profile is IBE_C_PROFILE_ROOT, the seeded iStore Customer Profile Menu Root.

IBE: Quick Links Menu

For site management integration, enables the Quick Links bin in the Customer UI, after the required setup procedures have been performed. Set at responsibility level to the customer responsibility of the specialty site which will display this bin. A null value means there is an empty menu, and even if you map the Quick Links bin to sections, nothing will be displayed if Null.

IBE: Relationship for Cart Related Items

Specifies the relationships used to display the related items at the bottom of the shopping cart. Possible values: All values defined under Catalog, Relationships in the Site Administration Application. Can be set at application, site, and responsibility levels.

IBE: Retain Credit Card Preferences

Specifies how iStore handles credit card preferences. When set to "Yes", this profile option allows iStore users to retain and display their credit card preferences that have been set up through the Payment Book setup. When set to "No", credit card preferences will not be available in iStore, and the user will have to enter credit card information every time while placing an order.

When this profile option is set to "No", the IBE: Use Express Checkout profile option should also be set to "No", since Express Checkout uses the credit card preference information. Express Checkout allows the iStore user to place an order in a single click instead of having the user enter credit card information

IBE: Return Orders Transaction Type

Specifies the default return type (Oracle Order Management transaction type) used to create returns, whether with Oracle Order Management approvals or without. Set to the transaction type used to create returns. Possible values will be the list of order transaction types of order categories, Return in Order Management. Can be updated at site and responsibility level. There is no default value for this profile.

Note: For Oracle iStore, transaction types of order Category = RETURN should only be created. Mixed should not be used and will not work.

IBE: Saved Cart Expiration Duration (# days)

Specifies the number of days that a user can access a saved shopping cart before it expires. The expiration date is calculated from the last update date of the cart, and the cart expires at the end of the day on which it is scheduled to expire. Default value: 90. Set to any integer.

IBE: Search Lines Per Page

Sets the number of lines to be displayed per page. Default = 20. Set to an integer.

IBE: Sections Per Page for Display

Specifies the total number of sections to display per catalog page. If the number of subsections that belong to the catalog page's current section exceeds the number set in this profile option, they are paginated. Users reach the continuation page through the "Next" link that Oracle iStore automatically includes in the section page. Default value: Null. If no value is set, the number of sections per page is not limited. Set to an integer.

IBE: Skip Checkout Steps for Order Placement

Specifies whether the Smart Checkout feature is enabled. Smart Checkout allows customers to skip billing and shipping pages during checkout. Set to Yes to enable the feature; set to No to disable the feature. Possible values: Yes/No. Default value: No. Can be set at site, application, and responsibility levels.

IBE: Use Add Item Bin

Specifies whether the Add Item bin is displayed on product pages in its default location; this bin contains an Add to Cart button. Possible values: Yes/No. Default value: Yes.

IBE: Use Advanced Search in Order Tracker

Specifies whether Advanced Search is enabled in Order Tracker (B2B and partner users only). Set to Yes to enable Advanced Search for B2B/partner users. Set to No to disable Advanced Search. Default value: No. Possible values: Yes/No. Can be set at site, application and responsibility levels.

IBE: Use Auth Permissions in Order Tracker

Specifies if permission checking is enforced for users to view only the orders placed by themselves or all of their organizations' orders in Order Tracker, and while drilling down into order details in some reporting bins in the Site Administration UI. Possible values: Yes/No. Default value: No. If set to Yes, iStore checks if the user has the following permissions in his user role, and if he doesn't, he is not allowed to view the organization orders: IBE_VIEW_INVOICE, IBE_VIEW_ORDER, IBE_VIEW_PAYMENT. Note that IBE_VIEW_RETURN_ORDER applies to this functionality if using Returns. Set at iStore application level.

IBE: Use CABO UI

Set this profile option to Yes. Default value: Yes.

IBE: Use Call Me Back

Specifies whether the callback feature is enabled. Possible values: Yes/No. Default value: No. Set at iStore application level.

IBE: Use Cart Level Service

This profile option is currently not in use. Set to No. Default value: No.

IBE: Use Catalog Exclusions

Specifies whether the exclude sections or products from sites functionality works. Possible values: Yes/No. Default value: Null (treated as No). Yes value: Sections or products explicitly excluded will not show up in Customer UI. No value: Any sections

or products explicitly excluded will still show up in Customer UI. If section or product exclusions are never specified for a site, then set to No to improve performance.

IBE: Use Commitments

Specifies whether customers can use commitments at checkout. Set to Yes or No depending on business need. Default value: No. When this profile is Yes, B2B users must have the IBE_VIEW_NET_PRICE permission to make use of commitments functionality.

IBE: Use Customer Service Exclusion

Used for service items functionality. If set to Yes, Oracle iStore calls an Oracle Service Contracts API to check and utilize party exclusion rule setups. Set to Yes if using party exclusion rules. Possible values: Yes/No.

IBE: Use Direct Item Entry

Specifies whether customer-to-merchant part number mapping and associated functionality (ability to upload .csv files in the direct item entry form and add items to the cart quickly) is available in the Direct Item Entry form in the Customer UI. Possible values: Yes/No. Default value: Yes. Can be set at application or responsibility levels.

IBE: Use Express Checkout

Specifies whether Express Checkout is enabled. Possible values: Yes/No. Default value: Yes.

Set this profile option to "No" if the IBE: Retain Credit Card Preferences profile option is set to "No".

IBE: Use Global Bin

Specifies whether the Global Bin is displayed on section pages in its default location. Possible values: Yes/No. Default value: Yes.

Note: This profile works only if you use the fixed layout when creating a section. If sections are associated to configurable layout, then you need to select the Global Bin and map it to a location in the layout template.

IBE: Use Install Base View

Controls the appearance of the My Products subtab in Order Tracker. Possible values: Yes/No. Default value: No.

IBE: Use Item Level Service

Enables or disables the Service Items Support functionality in Oracle iStore. Possible values: Yes/No. Default value: No.

IBE: Use Line Level Shipping

Specifies whether customers can enter line level shipping information in shipping information page. Possible values: Yes/No. Default value: Yes. If set to Yes, set IBE: Merge Shopping Cart Lines to No, as you cannot enable shopping cart line merging and line splitting simultaneously.

IBE: Use Logical Media for Images

Out-of-box, to improve performance, Oracle iStore uses hard-coded images to display icons and menus. Set to Yes if you are using customized menu or media object images. Yes: Display Manager uses logical media for menu or media object images. No value: Disables logical media retrieval for menu images and uses default hard-coded menu images. Default value: No.

IBE: Use Promotion Code

Enables the ability for users to enter promotional discount codes at the header and line level for items that are in the shopping cart. Possible values: Header/Line/Both Header and Line/None. A Null value is treated as None. By default, this profile will not be set and can be specified at the iStore Site, Application, Responsibility or User level. When this profile is enabled, users must have the IBE_VIEW_NET_PRICE permission to make use of promotion code functionality. When this profile is enabled, a menu item "Line Promotions" will appear in the Actions drop-down menu on the shopping cart page, allowing users to enter promotion codes for the line items in the shopping cart.

IBE: Use Returns

When using returns functionality, as a best practice, it is recommended that you set this profile option to Yes at responsibility level for users of Oracle iStore's Customer Application and Oracle iSupport's customer-facing user interface (if integrating with Oracle iSupport). By default, this profile is No at site level. It is recommended that you leave the site-level setting as No. The responsibility-level settings will over-ride the site-level settings. This profile, when set to Yes, causes the Return Items button to display (only if, for B2B users, the user has the IBE_CREATE_RETURN permission in his user role). Setting the profile according to this recommendation ensures that if you are implementing other Oracle E-Business Suite applications, the Return Items button will not display in these other applications.

IBE: Use Sales Assistance Feature

Specifies whether Sales Assistance is enabled. Possible values: Yes/No. Default value: No. If set to No, the Request Help action does not appear in the shopping cart and checkout flows, nor will the I Disagree (to Terms and Conditions) button appear in the Checkout: Terms and Conditions page. Can be set at application or responsibility levels.

IBE: Use Section Bin

Specifies whether the Browse Bin is displayed on section pages in its default location, at the left-hand side of the screen, on the Site Home Page and other section pages. Possible values: Yes/No. Default value: Yes.

Note: This profile works only if you use the fixed layout when creating a section. If sections are associated to configurable layout, then you need to select the Global Bin and map it to a location in the layout template.

IBE: Use Section Path

Specifies whether the section path is displayed on section and item pages in its default location. Possible values: Yes/No. Default value: Yes.

IBE: Use Sensitive Pages

A sensitive page is a page that displays personal, user-specific information. In Oracle iStore, the checkout and account pages are sensitive. Catalog (sections and products), shopping cart, and Order Tracker pages are not sensitive. Yes value: Application re-authenticates a logged-in user before displaying a sensitive page. Value of No: Re-authentication does not take place. Default value: Yes.

IBE: Use Sharecart Functionality

Specifies whether cart sharing is enabled. Possible values: Yes/ No. Default value: No. Set this profile option to the customer responsibility which maps to the applicable specialty site. Also can be set at site or application levels.

IBE: Use Shipping Instructions

Specifies whether users can enter shipping instructions in shipping information page; enables the Shipping Information section in the B2B and B2C shipping pages. Possible values: Yes/No. Default value: Yes.

IBE: Use Shopping Lists

Specifies whether shopping list functionality is available to customers. Possible values: Yes/No. Default value: Yes.

IBE: Use Specialty Sites Selection Page

Enables display of Site Selection page as default landing page. Possible values: Yes/No. Default value: Yes. If No, the Sites navigation icon is displayed in the UI. Can be set at site and application levels. Note that Oracle iStore does not support setting different levels for this profile option at site and application level. If you have set this profile option at application level, it is recommended that you un-set the application-level setting and set the profile at site level.

IBE: Use Specialty Site Picker

Enables Site Picker display on Site Home page. Possible values: Yes/No. Default value: No.

IBE: Use Web Placements

Specifies whether out-of-the-box eMerchandising postings from Oracle Marketing can display on Customer UI pages. Possible values: Yes/No. Default value: No. Yes enables eMerchandising postings. No disables eMerchandising postings, but users can still use the bins to display content. Can be set at application or site levels. If integrating Oracle iStore with other Oracle E-Business HTML applications, set at site level.

IBE: Use Welcome Bin

Enables the Welcome Bin on section pages. Possible values: Yes/No. Default value: Yes.

Note: This profile works only if you use the fixed layout when creating a section. If sections are associated to configurable layout, then you need to select the Global Bin and map it to a location in the layout template.

IBE: View-by Customer Orders in Order Tracker

Specifies whether B2C users, when viewing their orders in Order Tracker, see orders where they are the bill-to customer, the sold-to customer, or have the option of choosing either option. Possible values: Bill To/Ship To/All. Default value: Sold To. Can be set at application and responsibility levels. Following are the implications of the settings:

- All --- Enables a search filter in the user interface that allows users to select either Bill To or Sold To.
- Bill To --- Only orders where the user is the bill-to customer on the order are displayed (search filter does not display in this case).
- Sold To --- Only orders where the user is the sold-to customer on the order are displayed (search filter does not display in this case).
- Null --- This value is treated as the default (Sold To).

Important: To preserve backward compatibility, other Oracle E-Business Suite applications (e.g., Oracle iSupport, Oracle Customers Online, Oracle Trade Management, Oracle Sales Online) can leave this profile option blank at their application levels.

IBE: View Only Web Published Items in Install Base

Specifies whether only Web Published items are visible in the install base view in the My Products subtab in Order Tracker. Possible values: Yes/No. Default value: No. Can be set at application, site, and responsibility levels.

OM: Debug Log Directory

If you have set the IBE: Debug profile option to Yes for a user, verify or set this profile option to a directory that is writable by the database server. Oracle iStore Customer UI user-specific logs for the PL/SQL layer are written in this directory. Value = <Directory path>.

Customer UI Pricing Profile Options

Profile options in this section control the behavior of pricing behavior in Customer UI. All of these profile options are optional. Set at iStore application level unless otherwise specified.

IBE: Retrieve All Units of Measure for an Item

Specifies if all units of measure (UOMs) for an item are retrieved with prices or only primary UOM with prices. Possible values - Yes/No. Yes = All UOMs retrieved; No = Primary UOM retrieved. Default = No. Note that performance issues (slow loading of catalog pages) can occur if this profile is Yes. The performance issues can happen because, when the profile is Yes, a pricing call is made for each UOM of each item in the price list.

IBE: Use Line Agreements

Specifies whether B2B users with the permission, IBE_USE_PRICING_AGREEMENT, can select pricing agreements at item level, in addition to the cart-level agreement selection enabled by the permission. Possible values - Yes/No. Default = No. When this profile is Yes, users must have the IBE_VIEW_NET_PRICE permission to make use of the item-level pricing agreements functionality.

IBE: Use Price List Associated with Specialty Site

Specifies where to retrieve price lists. Possible values - Yes/No. Yes = Oracle iStore uses site-based price lists specified during site setup. No = Best price retrieved through Pricing Engine. Default = No. Can be set at site, application, or responsibility levels.

Note: Guest (walk-in user) user price lists are always determined by the price list selected for Walk-in Users in the Site Administration UI.

IBE: Use Site As Pricing Qualifier

Specifies whether a site can be used as a pricing qualifier. Possible values - Yes/No. Default = No.

QP: Multi-Currency Installed

Oracle Advanced Pricing profile. Specifies whether multiple currency price lists are supported. Possible values - Yes/No. Default = No. Set site or iStore application level.

Customer UI Product Search Profile Options

Set these at iStore application level unless otherwise directed.

IBE: Category Set Filter for Product Search

Allows you to specify which category set's products will be populated into the iStore search table. If the profile is not set, then products in all category sets will be populated to the iStore search table. Default = Null. It is recommended that it be set at site level to the Oracle iStore default product category set.

IBE: Enable Fuzzy Search

Enables "fuzzy" product searches. Possible values - Yes/No. Default = No.

IBE: No of Results in Search

Determines the maximum number of results returned. Default = 200. Set to an integer.

IBE: Thesaurus File Name

Specifies the prefix for the thesaurus names of the synonym files that you load for the Oracle iStore product synonym search. Default = IBETHESAURUS.

IBE: Use Category Search

Determines whether the search menu in the Customer UI restricts searches to category- or section-level searching. Yes = Categories with publishable items will be searched. No = Site's top level sections will be searched. Null = Enables basic search against all

products in the current site.

IBE: Enable Quick Search

Enables/disables Quick Search in the Customer UI. Default = Yes, at site level. Also can be set at application or responsibility level.

IBE: Use Synonym Search

Determines whether the product search retrieves product names that are synonyms of the users' search keywords. Possible values - Yes/No. Yes = Synonym search enabled (after you load a thesaurus). No = Synonym search disabled. Default = No.

IBE: Web Status Filter for Product Search

Allows you to specify whether products with a specific web status are populated to the iStore search table when the search concurrent program is run. Possible values are: All, Published, Published and Unpublished. A Null value is treated as Published. Default = Published. Set at site level.

ECC Search Profile Options

The following profile options are used to enable the ECC search in Oracle iStore:

IBE: Enable ECC Search Allows you to specify the type of search mechanism that will be used by iStore. With this profile set to Yes, the ECC Search page launches when you click the Advanced Search link. If the profile is set to No or is blank, iStore does not use the ECC search; it leverages the Oracle Text based search technology. This profile option can be set at the site, application, responsibility and user levels. This profile can be set at the site level to enable the ECC at the site level.

IBE: Use ECC Search for Landing Page

Allows you to specify the ECC Search page as the default landing page. With this profile set to Yes, the ECC Search page launches as the default landing page and you do not have to click the Advanced Search link to launch it. To leave the ECC Search page, you can click any section tab or link to and navigate to other pages. To launch the ECC Search page again from any page, click the Advanced Search link, which is available on every page across the iStore application, except for the first default landing page. If the profile is set to No or is blank, the ECC Search page launches when you click the Advanced Search link. This profile option can be set at the site, application, responsibility and user levels based on your preference.

IBE: Update Customer Pricing in ECC

Allows you to specify if the customer pricing in the ECC server can be updated at the runtime. With this profile set to Yes, when the customer uses the best prices, the customer pricing is calculated and pushed to the ECC server upon login. In this case, the customer pricing is available as the search refinement.

Caution: Performance issues that slow the loading of pages can occur if

the IBE: Update Customer Pricing in ECC profile is Yes, as a pricing call is made for each item in the price list.

If the profile is set to No or is blank, when the customer uses the best price, the calculation of the customer pricing is deferred until after the search is performed in the ECC page. In this case, the customer pricing is not available as the search refinement. This profile option can be set at the site level only.

Lead Import Profile Options

Set these profile options at iStore application level, unless otherwise directed. For more information, see the chapter, Integrating Oracle iStore with Oracle Sales Applications, page 29-1.

IBE: Order Lead Import Interval (In Days)

Determines the number of days between retrieval of order lead data. Default value = 1.

IBE: Quote Lead Import Interval (In Days)

Determines the number of days between retrieval of quotes lead data. Default value = 1.

IBE: Email Address For Lead Import Status

Enter the e-mail address of the person to whom the lead import program status will be sent. Use the format: john.doe@company.com. Separate multiple entries with a single space or comma. Default value = Null.

Oracle Workflow (E-mail Notifications) Integration Profile Options

Set these profile options at iStore application level, unless otherwise directed.

IBE: Order Administrator for Booking Issues

Specifies the default order administrator's Oracle Workflow user name. An e-mail is sent to this order administrator upon errors in submitting orders. Set this to the Oracle Workflow username of the appropriate user.

IBE: Email Address to Send Diagnostic Messages

Specifies the e-mail address that receives diagnostic messages when there is an Oracle iStore application error in the Customer UI, such as an exception. Oracle iStore sends the exception message and application context to this e-mail address. The recipient can use the information to troubleshoot Oracle iStore. Can be set at site and application levels.

IBE: Order Administrator

Specifies the default order administrator's Oracle Workflow user name for partner's orders. An e-mail is sent to this order administrator when orders submitted by partner users have generated errors. Set this to the Oracle Workflow username of the

appropriate user. Can be set at the site, application and responsibility levels.

Caching and SSL Profile Options

Set these profile options at iStore application level, unless otherwise directed.

Note: IBE Cache is no longer supported. Use JTT Cache instead of IBE Cache.

IBE: Use Web Cache Feature

Mandatory profile option. Specifies whether to use Oracle Application Server Web Cache. Set to Yes or No depending on business need. Default = No.

IBE: iStore Non Secure URL

Mandatory profile option. Specifies the base URL for the non-secure server (HTTP). If it is not set, you cannot switch between HTTP and HTTPS. If integrating with Oracle Application Server Web Cache, set to the web cache URL and bounce the server. This will ensure that all iStore non-secure pages are coming through the Web Cache server. Can be set at site or application level.

The profile option must have the following syntax:

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

IBE: iStore Secure URL

Specifies the base URL for the secure server (HTTPS). Can be set at site or application level.

Oracle Order Capture/Oracle Quoting Integration Profile Options and Parameters

This section contains profile options and parameters for integration with Oracle Order Capture and Oracle Quoting. Set at site and iStore application level, unless otherwise directed. This section does not include the mandatory profile options listed in other sections. See *Oracle Quoting Implementation Guide* for more information on the Quoting profile options and parameters.

Oracle Quoting Integration Profile Options

ASO: Configuration Effective Date

The Configuration Effective Date is used to filter effective nodes and rules. This date is an input parameter for the Configurator Batch Validate API. It is also an input parameter to open the Oracle Configurator Home page from the Oracle Quoting application. For more details, refer to the `config_effective_date` parameter in the Initialization Parameter Descriptions section of the *Oracle Quoting Implementation Guide*.

For Oracle iStore, ASO: Configuration Effective Date must be set to the default value, which is Blank or Null.

ASO: Copy Configuration Effective Date

This is the host application's notion when the configuration is created. This date is an input parameter for the Configurator Batch Validate API. It is also an input parameter to open the Oracle Configurator Home page from the Oracle Quoting application. For more details, refer to the `config_creation_date` parameter in the Initialization Parameter Descriptions section of the *Oracle Quoting Implementation Guide*.

For Oracle iStore, ASO: Copy Configuration Effective Date must be set to the default value, which is Blank or Null.

ASO: Enable Line Level Billing

Specifies whether B2B customers can enter line-level billing information at checkout. Payment type must be cash or invoice to use line level billing. Possible values - Yes/No. Default = No. Can be set at site, application, and responsibility levels.

ASO: Enable ASO Debug

Ensures that Oracle Order Capture-related logging messages will appear in the PL/SQL log files along with those for Oracle iStore, Oracle Order Management, and Oracle Pricing. Possible values - Yes/No. Set at user level only.

ASO: Enable Risk Management on Credit Card Authorization

Specifies whether risk management functionality is enabled. Possible values - Yes/No. Default value = Yes. A null value is interpreted as Yes. Can be set at site, application, responsibility, and user levels.

ASO: Quote Conversion Type

Set at iStore application level to the same value as the Oracle Quoting application level setting.

ASO: Reservation Level

Specifies the level at which item reservations are performed. Items can be reserved manually, or automatically when the order is placed. Set to Null at site level only.

ASO: Validate Salesrep

Specifies whether a sales representative must be specified on a quote prior to submitting it as an order. Possible values - Yes/No. Default value = No.

IBE: Allow Update for Draft Quotes

If set to Yes, allows customers to update published quotes in Draft status in the Customer UI. Also enables Updateable table column in My Quotes page. Possible values - Yes/No. Default value = No. Set at site level only.

IBE: Use Quote Publishing

If set to Yes, allows customers to access quotes in two areas in the Customer UI: (1) Enables the View Quotes link in the Welcome Bin on sites' home pages; (2) Enables the My Quotes subtab within the Cart button in the Customer UI. Possible values - Yes/No. Default value = No. Set at application level only.

OKC: Enable Sales Contracts

Enables/disables Terms and Conditions functionality in the Customer UI. If the profile option is No, Oracle iStore will not display T&Cs and no contract ID will be passed to Oracle Order Management. This profile may be set at the site and application levels. If using Oracle Quoting and Oracle iStore together with the T&Cs functionality, the profile option should be set at site level.

OKC: HTML Layout Template

Allows the display of Terms and Conditions to users in the Customer Application. Ensure a setting of `Contract Terms Layout Template` for iStore (this is the default value). This profile option Set at site, application, and responsibility levels according to business requirements.

Oracle Quoting Integration Parameters

The following (previously profile options) are Oracle Quoting parameters that must be set for certain integration. For steps to set the parameters, see the section below, "Setting Quoting Parameters".

Default Contract Template

Specifies the default contract template for Terms and Conditions. The LOV to select the default template will show all the contract templates set up through Oracle Quoting. Oracle iStore and Oracle Quoting will have access to the same set of templates. This parameter should be set at organization level. Default = Null. If no default contract template is specified for this profile and contracts integration is enabled (OKC: Enable Sales Contracts = Yes), Oracle iStore will not show the T&C link in the order review page and hence no T&Cs will be passed to Oracle Order Management. Note that the LOV at each level is restricted by organization.

Default Order Type

Determines how an order is to be processed in Oracle Order Management. Order types (`ORDER_CATEGORY_CODE` internal name) restrict the types of lines on an order. Recommended value: `Mixed`. Can also be set at site and responsibility levels. See the *Oracle Order Management Suite Implementation Guide* for more details.

Default Salesrep

Set to default sales representative for sales assistance. Used to assign a sales representative to a quote when Sales Assistance is initiated, and to send the e-mail notification to the sales representative. However, if automatic sales representative assignment is set up through Oracle Territory Manager, then the sales representative (Resource ID) for the quote header gets changed to the territory-based sales representative (through an Oracle Order Capture API), and the e-mail notification goes to this sales representative.

Setting Quoting Parameters

To set the above mentioned parameters, follow the steps below:

1. Log in to Oracle Self Service Applications as System Administrator and select the HRMS Vision Enterprises responsibility.
2. Navigate to Work Structures: Organization, and then select Description.
3. Search for Vision Operations in the Find Organization screen (or, search for a different organization, if appropriate to your implementation).
4. After finding the organization, select the Find button to retrieve the Organization window.
5. In the Classifications region of the Organization window, find the Operating Unit classification and highlight the record.
6. Select the Others button to retrieve the Additional Organization Information window.
7. In the list, select Quoting Parameters and press Ok. Click inside the window that appears to retrieve the Quoting Parameters window, where you can set these parameters.
8. Save your changes.

Oracle Configurator/Bills of Material Integration Profile Options

Set the profile options in this section at the levels described in the table below.

BOM: Configurator URL of UI Manager

Required for Configurator integration. Specifies the URL for the Oracle Configurator Servlet. Set to Oracle Configurator Servlet URL at site, iStore application, and IBE_CUSTOMER responsibility.

ASO: Configurator URL

Mandatory profile option. Set to the same value as BOM: Configurator URL of UI Manager.

OM: Use Configurator

Mandatory profile option. Set at site level to Yes if you are integrating with Oracle Configurator.

Oracle Content Manager Integration Profile Options

The following profile options should be set if you are integrating with Oracle Content Manager. The internal product code/key for Oracle Content Manager is IBC. Set the profile options in this section at the levels indicated.

IBE: Default Home Folder

Specifies the default folder for OCM integration; allows the iStore administrator to access the correct folder in OCM. Set at application level to /IBE.

IBE: Number of Days for Expiring Content

Determines the timeframe for the default search performed in the Usage Summary screen. Oracle iStore reads the value of this profile option (x) and includes only those content items whose expiration date is that number of days (x) or less from system date (current date). Default value = Null. If set to Null, all content items will display, regardless of expiration date. Set at iStore application level.

IBE: Use Content Management Integration

When the iStore Content Items Migration concurrent program is run, the concurrent program sets this profile to Yes at the iStore site level. Note that you cannot use this profile option to turn "off" the integration between Oracle iStore and Oracle Content Manager.

Note: The profile options IBE: Use Content Management Integration and IBE: Use Database for Media Storage should be set to "Yes" since integration with Oracle Content Manager is mandatory.

Note: Oracle iStore does not support different values for this profile option at site and application level. If profile option is set at application level, unset the application-level setting and set the profile at site level.

IBC: Use Access Control

This profile option controls whether user permissions are checked in the OCM pages. If this profile option is set to No at the iStore administrator responsibility level, then the iStore administrator has access/permissions to all content functionality. If the profile option is set to Yes, then you can control the permissions at the user level. Recommended value = Yes at the site level; ensure a No setting at all other levels. See the *Oracle Content Manager Implementation Guide* for additional details.

Oracle Marketing Integration Profile Options

The following profile options should be set if you are integrating with Oracle Marketing. The internal key for Oracle Marketing is AMS. Set the profile options in this section at the levels indicated.

IBE: Use Advanced Product Setup

Controls whether Oracle iStore's or Oracle Marketing's Product Detail pages are invoked in the Site Administration UI. To invoke Oracle Marketing's Product pages, set this profile option to Yes at the iStore application level. If set to No, then Oracle iStore's Product Detail pages will be retrieved. Profile is updateable at all levels.

AMS: Inventory Item Update Allowed

Allows items created in Oracle Inventory to be updated through the Oracle iStore-Oracle Marketing integration screens. Set to Yes at site level.

AMS: Item Validation Organization

Set this to your Master Organization at site level. This profile option and IBE: Item Validation Organization profile option must match at site level. Note that if you set IBE: Item Validation Organization at iStore administrator responsibility level to a different inventory organization than that specified at site level in AMS: Item Validation Organization, then the iStore administrator will not have access to the product creation abilities; however, he will still be able to update products in the inventory organization specified at the responsibility level. Cannot be set at responsibility level.

OSO: Debug Messages On

Allows Oracle Marketing debug messages to appear. Set to Yes at site level.

Unsupported Profile Options

The following IBE profile options are not supported:

- IBE: Authorize Payment Offline During Normal Checkout
- IBE: Cache On
- IBE: Capture Payment for Downloadable Products
- IBE: Cart Level Support Duration
- IBE: Create Standard Contract
- IBE: Days For Email
- IBE: Default Contract Template Name
- IBE: Default Display Context
- IBE: Default Item Media
- IBE: Default Item Template
- IBE: Default Pricing Agreement for the User

- IBE: Default Request Terms Change User to Send Workflow Notification
- IBE: Default Sales Assistant to Send Workflow Notification
- IBE: Default Sales Lead Promotion Code
- IBE: Default Section Media
- IBE: Default Section Template
- IBE: Display Language List in Specialty Store Page
- IBE: Display Specialty Store Selection in Alphabetical Order
- IBE: Dynamic Content Callback Parameter
- IBE: Email Promotions
- IBE: Enable Walkin Order Search in Order Tracker
- IBE: Express Checkout Error Behavior
- IBE: Finalize Order On Error in Authorize Payment
- IBE: Line Level Pricing Event for Shopping Cart
- IBE: iStore Materialized Views Usage
- IBE: Maximum Number of Saved Shopping Carts
- IBE: Maximum Number of Shopping Lists
- IBE: Notification User Role
- IBE: Number of Days for New Item Definition
- IBE: Preload Specialty Store Cache
- IBE: Preferred Shipping Method
- IBE: Preferred Support Level for Shopping Cart
- IBE: Recalculate Price in Order Management
- IBE: Reject Terms and Conditions Flow
- IBE: Reserve Items On Every Express Checkout

- IBE: Search Minimum Prefix Value
- IBE: Search Operator
- IBE: Section Name for CD Packs Section
- IBE: Shopping Cart Expiration Duration
- IBE: Shopping Cart Price based on Owner
- IBE: Shopping Cart Frozen Price Duration
- IBE: Show Change Store Link
- IBE: SMTP Server
- IBE: Top Number of Items
- IBE: URL Prefix for DataBase Media
- IBE: URL Prefix for Media in File System
- IBE: URL to Launch Content Bin
- IBE: Use AOL Menu in Customer UI
- IBE: Use B2B Features
- IBE: Use Business to Customer Features
- IBE: Use Business User Auto Approval
- IBE: Use CD Packs
- IBE: Use Contracts
- IBE: Use CSI Number in Order Tracker
- IBE: Use Default Bin Preference
- IBE: Use Fax Credit Card as a Payment Option
- IBE: Use Invoice as a Payment Option
- IBE: Use JTA User Management
- IBE: Use Line Types

- IBE: Use Notes
- IBE: Use Shop List
- IBE: Use Tasks
- IBE: View Custom Quote Line Details
- IBE: Use Workflow Features in iStore

Seeded User Data

This appendix covers the following topics:

- Overview of Seeded User Data Appendix
- Understanding Oracle Applications Responsibilities
- Oracle Forms Responsibilities for Oracle iStore Setup
- Oracle E-Business Suite Responsibilities for Oracle iStore Setup
- Oracle iStore Customer UI Responsibilities
- Oracle iStore Customer UI Roles and Permissions
- Oracle iStore B2B User Permissions
- Oracle iStore B2B User Permissions Descriptions
- Site Management User Type Definitions
- Site Management User Registration Templates
- Site Management Profile Pages Permissions
- Permission Migration Script

Overview of Seeded User Data Appendix

This appendix lists the seeded Oracle Forms, Oracle CRM Applications, and Oracle iStore Site Administration and Customer Application users and responsibilities necessary to implement Oracle iStore.

Understanding Oracle Applications Responsibilities

User names and responsibilities are set up in Oracle Applications to secure access to the data and functionality within the applications. The key element in Oracle Applications security is the definition of a responsibility. A responsibility defines:

- Application database privileges
- An application's functionality that is accessible
- The concurrent programs that are available

The system administrator defines application users and assigns one or more responsibilities to each user. In the Oracle iStore context, the system administrator may be you or another person.

See *Oracle E-Business Suite Security Guide* and *Oracle E-Business Suite User's Guide* for more information on how to set up user names and responsibilities.

All Oracle Applications products are installed with predefined responsibilities known as *seeded* responsibilities. Consult the implementation or reference guide for your Oracle Applications product for the names of those predefined responsibilities.

Oracle Forms Responsibilities for Oracle iStore Setup

Access Oracle Forms by navigating to:

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

and selecting Apps Logon Links > VIS Logon through the Forms cartridge. Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle iStore in Oracle Forms.

Oracle Forms Responsibilities

Responsibility	Tasks
AK Developer	Define regions in Apps to troubleshoot Postsales errors.
Application Developer	<p>Enable or disable B2B or B2C user registration.</p> <p>Modify specialty site text messages.</p> <p>Set up descriptive flexfields to appear on item detail pages.</p> <p>Set up comment flexfields to appear on the checkout page.</p>
Apps for the Web Manager	Define regions in Apps to troubleshoot Postsales errors.

Responsibility	Tasks
General Ledger Super User	Set the daily currency conversion rate and create calendars in Oracle General Ledger for iStore Reports.
Inventory responsibility	Inventory setups.
iStore Concurrent Programs Responsibility	Schedule or run iStore concurrent programs
Order Management Super User	Set up Oracle Order Management.
Receivables Manager	Set up Oracle Receivables.
System Administrator	Set profile options. Set up Oracle iStore administrator and guest user accounts. Check the status of concurrent program requests. Set up credit card payments in Oracle iStore.

Oracle E-Business Suite Responsibilities for Oracle iStore Setup

Access the Oracle CRM Login Servlet login page at:

http://host:port/OA_HTML/CRMLogin

Log in with the appropriate user name and responsibility to perform the specified tasks.

The following table summarizes the user names and responsibilities necessary to perform setup and administrative tasks for Oracle iStore in Oracle CRM Applications.

Oracle E-Business Suite HTML Applications Users and Responsibilities

User	Responsibility	Tasks
<Site Manager User Account>	iStore Administrator IBE_ADMINSTRATOR	All tasks within the Site Administration UI.
	Logging in with this responsibility launches the Oracle iStore Site Administration UI.	

User	Responsibility	Tasks
SYSADMIN	Foundation (HTML) Administration	Set up Oracle CRM System Administrator Console
	Logging in with this responsibility launches the Oracle CRM System Administrator Console.	Set up default roles and responsibilities for customer users.

Oracle iStore Customer UI Responsibilities

At least one customer responsibility is assigned to each customer name when the name is approved during user registration. You can use the seeded IBE_CUSTOMER responsibility and create other customer responsibilities too.

In a multiple operating unit environment, you need to create a customer responsibility for each operating unit if you want a customer to access only items from the Inventory Organization specific to each operating unit.

In the Site Administration UI, you can specify a list of the customer responsibilities that are supported by a given site. You can select these from all existing iStore responsibilities. You can also specify, for a given site, whether Oracle iStore checks the customer's responsibilities and grants access only if the customer has an assigned responsibility that is supported by the site.

If multiple responsibilities are supported by a site, a customer who logs in to the site must choose one responsibility for that session. The responsibility uniquely identifies the operating unit against which any orders placed during the session will be booked. The responsibility is assigned only for the current session.

If you set up a site to check the customer's responsibility, the customer can choose only from the responsibilities that have been assigned to him or her during registration. If the site is not set up to check the customer's responsibility, then the customer can choose any supported responsibility in any site that does not check the customer's assigned responsibilities.

The following table summarizes the responsibilities seeded by Oracle iStore for Web site customers to use in the Customer UI, located at:

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

Oracle iStore Customer UI Users and Responsibilities

User	Responsibility	Tasks
<Guest User Account>	IBE_CUSTOMER	The guest user name is assigned to every customer who browses the site without registering. You must assign the IBE_CUSTOMER responsibility or another customer responsibility as a default for guest users.
<Customer User Account>	IBE_CUSTOMER	Select IBE_CUSTOMER or another customer responsibility to be assigned by default to every registered customer.

Oracle iStore Customer UI Roles and Permissions

This section lists the permissions that a shipped within each seeded user role.

Business User Role Seeded Permissions

The following are the permissions seeded and supported in the B2B user role, iStore Business User Role (IBE_BUSINESS_USER_ROLE). Note that several unsupported permissions may appear in this role out-of-the-box; the unsupported permissions are listed later in this chapter.

- IBE_ASK_SALES_ASSISTANCE
- IBE_CANCEL_ORDER
- IBE_CHECKOUT
- IBE_CREATE_BILLTO_CONTACT_ADDRESS
- IBE_CREATE_ORDER
- IBE_CREATE_RETURN
- IBE_CREATE_SHIPTO_CONTACT_ADDRESS
- IBE_VIEW_INVOICE

- IBE_VIEW_NET_PRICE
- IBE_VIEW_ORDER
- IBE_VIEW_PAYMENT
- IBE_VIEW_RETURN_ORDER
- IBE_INT_ADMINISTRATORS
- IBE_INT_ORG_ADDRESS_BOOK
- IBE_INT_ORG_DETAILS
- IBE_INT_ORG_EMAIL_ADDRESSES
- IBE_INT_ORG_PHONE_NUMBERS
- IBE_INT_ORG_TELEX_NUMBERS

Note: The B2B role for previous releases, IBE_DEFAULT_ROLE, is also seeded in Oracle iStore, for backward compatibility.

Primary User Role Seeded Permissions

The following are the permissions seeded in the iStore Primary User Role (IBE_PRIMARY_USER_ROLE). Note that several unsupported permissions may appear in this role out-of-the-box; the unsupported permissions are listed later in this chapter.

- IBE_ASK_SALES_ASSISTANCE
- IBE_ASSIGN_SITES
- IBE_CANCEL_ORDER
- IBE_CHANGE_SHIPTO_CONTACT
- IBE_CHECKOUT
- IBE_CREATE_BILLTO_CONTACT_ADDRESS
- IBE_CREATE_ORDER
- IBE_CREATE_RETURN
- IBE_CREATE_SHIPTO_CONTACT_ADDRESS
- IBE_VIEW_INVOICE

- IBE_VIEW_NET_PRICE
- IBE_VIEW_ORDER
- IBE_VIEW_PAYMENT
- IBE_VIEW_RETURN_ORDER
- IBE_INT_ADMINISTRATORS
- IBE_INT_ASSIGN_ACCOUNTS
- IBE_INT_ASSIGN_ROLES
- IBE_INT_MANAGE_CONTACT
- IBE_INT_MANAGE_CONTACT_INFO
- IBE_INT_ORG_ADDRESS_BOOK
- IBE_INT_ORG_DETAILS
- IBE_INT_ORG_EMAIL_ADDRESSES
- IBE_INT_ORG_PHONE_NUMBERS
- IBE_INT_ORG_TELEX_NUMBERS
- IBE_INT_PENDING_APPROVAL
- IBE_INT_PRIMARY_USER
- IBE_INT_ROLE_MANAGEMENT
- IBE_INT_UPDATE_ORG_DETAILS
- IBE_INT_USER_MANAGEMENT
- JTF_PRIMARY_USER_SUMMARY

Oracle iStore B2B User Permissions

This section describes the seeded role permissions that are supported for use in Oracle iStore.

Note: Some permissions enable certain UI objects to appear in the Customer UI, for the users with those permissions. For example, a user with IBE_CHANGE_BILLTO_CONTACT permission will see a Change button in the

shipping and billing information pages. Similarly, a customer with IBE_CANCEL_ORDER permission will see a Cancel button next to orders that are cancellable in the Order Tracker pages. For users without these permissions, these UI objects do not appear.

Important: Roles (and thus permissions) do not apply to B2C users. When they register, they automatically receive their default Customer UI permissions, which are the same as the B2B permissions with a few exceptions in cart permissions. See the chapter, "Implementing Carts and Orders", for more information.

Oracle iStore-Specific Permissions

Following are the supported iStore-Specific B2B user permissions. Descriptions of each permission can be found later in this chapter.

- IBE_ASK_SALES_ASSISTANCE
- IBE_ASSIGN_SITES
- IBE_BILLTO_ANY_ACCOUNT
- IBE_CANCEL_ORDER
- IBE_CANCEL_ORGANIZATION_ORDER
- IBE_CHANGE_BILLTO_CONTACT
- IBE_CHANGE_BILLTO_CUSTOMER
- IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS
- IBE_CHANGE_END_CUSTOMER
- IBE_CHANGE_END_CUST_CONTACT
- IBE_CHANGE_SHIPTO_CONTACT
- IBE_CHANGE_SHIPTO_CUSTOMER
- IBE_CHECKOUT
- IBE_CREATE_BILLTO_CONTACT
- IBE_CREATE_BILLTO_CONTACT_ADDRESS
- IBE_CREATE_BILLTO_CUSTOMER
- IBE_CREATE_BILLTO_CUSTOMER_ADDRESS

- IBE_CREATE_END_CONTACT
- IBE_CREATE_END_CONTACT_ADDRESS
- IBE_CREATE_END_CUSTOMER
- IBE_CREATE_END_CUSTOMER_ADDRESS
- IBE_CREATE_ORDER
- IBE_CREATE_RETURN
- IBE_CREATE_SHIPTO_CONTACT
- IBE_CREATE_SHIPTO_CONTACT_ADDRESS
- IBE_CREATE_SHIPTO_CUSTOMER
- IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS
- IBE_CREATE_SOLDTO_CUSTOMER
- IBE_IGNORE_THRESHOLD
- IBE_SHIPTO_ANY_ACCOUNT
- IBE_USE_ATTACHMENT
- IBE_USE_PRICING_AGREEMENT
- IBE_USE_PAYMENT_BOOK
- IBE_VIEW_CUST_WITHOUT_ACCOUNT
- IBE_VIEW_INVOICE
- IBE_VIEW_NET_PRICE
- IBE_VIEW_ORDER
- IBE_VIEW_PAYMENT
- IBE_VIEW_RETURN_ORDER

Common Permissions

Following are the supported common B2B user permissions. Common permissions are those shared by Oracle iStore and other integrating applications. Descriptions of each

permission can be found later in this chapter.

- IBE_INT_ADMINISTRATORS
- IBE_INT_ASSIGN_ACCOUNTS
- IBE_INT_ASSIGN_ROLES
- IBE_INT_MANAGE_CONTACT
- IBE_INT_MANAGE_CONTACT_INFO
- IBE_INT_ORG_ADDRESS_BOOK
- IBE_INT_ORG_DETAILS
- IBE_INT_ORG_EMAIL_ADDRESSES
- IBE_INT_ORG_PHONE_NUMBERS
- IBE_INT_ORG_TELEX_NUMBERS
- IBE_INT_PENDING_APPROVAL
- IBE_INT_PRIMARY_USER
- IBE_INT_ROLE_MANAGEMENT
- IBE_INT_UPDATE_ORG_DETAILS
- IBE_INT_USER_MANAGEMENT

Oracle Common Application Components Permissions

See the section, "JTF_PRIMARY_USER_SUMMARY", later in this chapter.

Oracle iStore B2B User Permissions Descriptions

Following are the descriptions of the B2B user permissions:

IBE_ASK_SALES_ASSISTANCE

Allows a user to request sales assistance in the checkout phase, and to disagree with terms and conditions. If a user does not have this permission, he will not see the Need Salesrep Assistance button in the Order Review page, nor will he see the I disagree - Need Assistance button in the Review Terms and Conditions page.

IBE_ASSIGN_SITES

Controls the ability by primary users to assign sites to other users in the Sites > Assign Access pages (within the Contact Management menu).

IBE_BILLTO_ANY_ACCOUNT

Allows a customer to search on and retrieve all existing customers rather than only those with an existing billing relationship with the sold-to customer. Note that "all existing customers" is restricted to customers that have a valid party relationship of type 'CUSTOMER_OF' with the sold-to customer, as well as any customer that has a billing account relationship with the sold-to customer.

IBE_CANCEL_ORDER

Allows users to cancel their own orders that are in Booked or Entered state in Oracle Order Management. Enables the display of the Cancel Order button.

IBE_CANCEL_ORGANIZATION_ORDER

Allows users to view and cancel orders for their current session operating unit and other operating units within their organization.

IBE_CHANGE_BILLTO_CONTACT

Allows a user to change the bill-to contact name from the default (if any) bill-to contact name. This permission works in tandem with IBE_CHANGE_BILLTO_CUSTOMER.

IBE_CHANGE_BILLTO_CUSTOMER

Allows a user to change the bill-to customer from the default bill-to customer.

Note: If you explicitly grant this permission to a user, you should also grant the IBE_CHANGE_BILLTO_CONTACT permission to the user.

IBE_CHANGE_BILLTO_CUSTOMER_ADDRESS

Allows B2B users to change the bill to customer address from the default bill to customer address. If this permission is not given to a B2B user, then the default bill to customer address is used during the checkout process.

IBE_CHANGE_END_CUSTOMER

Allows a user to change the end customer.

IBE_CHANGE_END_CUST_CONTACT

Allows a user to change the end customer contact.

IBE_CHANGE_SHIPTO_CONTACT

Allows a user to change the ship-to contact name from the default (if any) ship-to contact. This permission works in tandem with IBE_CHANGE_SHIPTO_CUSTOMER.

IBE_CHANGE_SHIPTO_CUSTOMER

Allows a user to change the ship-to customer from the default ship-to customer.

Note: If you explicitly grant this permission to a user, you should also grant the IBE_CHANGE_SHIPTO_CONTACT permission to the user.

IBE_CHECKOUT

Allows a user to see and use the Checkout button in shopping cart.

IBE_CREATE_BILLTO_CONTACT

Allows the user to create a new contact name for the bill-to customer who will have a bill-to relationship with the bill-to customer.

IBE_CREATE_BILLTO_CONTACT_ADDRESS

Allows the user to create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact.

IBE_CREATE_BILLTO_CUSTOMER

Allows a user to create a new customer with a billing relationship to the sold-to customer.

IBE_CREATE_BILLTO_CUSTOMER_ADDRESS

Allows the user to create a new address associated with the bill-to customer which will have a bill-to relationship with the bill-to customer.

IBE_CREATE_END_CUSTOMER_CONTACT

Allows a user to create the end customer contact.

IBE_CREATE_END_CUSTOMER_CONTACT_ADDRESS

Allows a user to create the end customer contact's address.

IBE_CREATE_END_CUSTOMER

Allows a user to create the end customer.

IBE_CREATE_END_CUSTOMER_ADDRESS

Allows a user to create the end customer address.

IBE_CREATE_ORDER

Allows a user to submit a quote or cart as an order by pressing the Place Order button. If a user has this permission, ensure that he has the IBE_CHECKOUT permission as well, since without IBE_CHECKOUT the user will not see a Checkout button to enter the checkout phase.

IBE_CREATE_RETURN

Allows users to view and create returns from orders placed by themselves. Enables the Create Return button in the Returns summary page.

IBE_CREATE_SHIPTO_CONTACT

Allows the user to create a new contact name for the ship-to customer who will have a ship-to relationship with the ship-to customer.

IBE_CREATE_SHIPTO_CONTACT_ADDRESS

Allows the user to create a new address associated with the ship-to contact which will

have a ship-to relationship with the ship-to contact.

IBE_CREATE_SHIPTO_CUSTOMER

Allows a user to create a new customer with a shipping relationship to the sold-to customer.

IBE_CREATE_SHIPTO_CUSTOMER_ADDRESS

Allows the user to create a new address associated with the ship-to customer which will have a ship-to relationship with the ship-to customer.

IBE_IGNORE_THRESHOLD

Exempts a user from any Payment Threshold restrictions that are in place.

IBE_SHIPTO_ANY_ACCOUNT

Allows a user to search on and retrieve all existing customers rather than only those with an existing shipping relationship with the sold-to customer. Note that "all existing customers" is restricted to customers that have a valid party relationship of type 'CUSTOMER_OF' with the sold-to customer, as well as any customer that has a shipping account relationship with the sold-to customer.

IBE_USE_ATTACHMENT

Allows the user to attach files in the shopping cart. If using this permission, ensure that the profile option, IBE: Attachment Document Category, is set to MISC at the iStore application level.

IBE_USE_PRICING_AGREEMENT

Allows the user to use pricing agreements. B2B users also must have IBE_VIEW_NET_PRICE permission to see pricing agreements data.

Note: The profile option, IBE: Use Line Agreements, specifies whether B2B users with the IBE_USE_PRICING_AGREEMENT permission can select pricing agreements at item level, in addition to the cart-level agreement selection enabled by the permission.

IBE_USE_PAYMENT_BOOK

Allows the user to include the payment book feature for retaining credit card preferences and specifying a default credit card when placing orders. This permission controls the availability of the payment book and specifying a default credit card when navigating through the ordering process. If this permission is not included for existing roles, then the link to the payment book will not be available. If using this permission, ensure that the profile option, "IBE: Retain Credit Card Preferences", is set to Yes at the iStore site level.

IBE_VIEW_CUST_WITHOUT_ACCOUNT

Allows a user to search on and retrieve existing customers without an account.

IBE_VIEW_INVOICE

Allows a user to view invoices related to the entire organization, through Order Tracker. Oracle iStore checks this permission only if the profile option, IBE: Use Auth

Permissions in Order Tracker, is set to Yes.

IBE_VIEW_NET_PRICE

Allows a user to see all prices (i.e. list prices, discount prices and net prices), instead of just list prices in the shopping cart and Order Tracker pages. This permission does not affect the user's ability to view prices in the catalog. This permission also controls the pricing agreement, promotion code, and commitment functionalities in Oracle iStore. Users without this permission cannot see amounts in the Order Tracker Invoices and Payments pages. In addition, different behavior occurs for TSO and non-TSO items, as described below.

Following is the specific behavior in the shopping cart.

- If the user has the IBE_VIEW_NET_PRICE permission:
 - For TSO models and their children, prices and taxes are shown only if list price is not zero.
 - For non-TSO models, prices and taxes are always shown.
- If the user does not have the IBE_VIEW_NET_PRICE permission:
 - For TSO models and their children, the list price is displayed instead of selling price in the Price column. Item level taxes are not shown. For the cart level totals, the One Time Price, Monthly Price and Quarterly Price are displayed and the Pay Now Section (consisting of Sub-Total, Tax, Shipping and Handling and Total Due with Order) are not displayed.
 - For non-TSO models, the list price is displayed instead of selling price in the Price column. Item level taxes are not shown. For the cart level totals, the rolled up list price is shown as Sub-Total.

Following is the specific behavior in Order Tracker (including Returns):

- If the user has the IBE_VIEW_NET_PRICE permission:
 - For TSO models and their children, prices and taxes are shown only if list price is not zero (same as shopping cart).
 - For non-TSO models, prices and taxes are always shown (same as shopping cart).
- If the user does not have the IBE_VIEW_NET_PRICE permission:
 - For TSO models and their children, the list price is displayed instead of selling price in the Price column. Item level taxes are not shown. For the cart level totals, the One Time Price, Monthly Price and Quarterly Price are displayed and the Pay Now section (consisting of Sub-Total, Tax, Shipping and Handling and Total Due with Order) are not displayed.

- For non-TSO models, the Price column is not displayed at all and item level taxes are not shown.

For users without this permission, it is recommended that they also not have the following permissions: IBE_CHECKOUT, IBE_CREATE_ORDER, IBE_CREATE_RETURN, or IBE_VIEW_ORDER.

IBE_VIEW_BILL_TO_ORDER and IBE_VIEW_ORDER

IBE_VIEW_BILL_TO_ORDER allows B2B users to see the orders for other customers where they are the bill-to, while IBE_VIEW_ORDER allows them to see orders where they are the sold-to.

IBE_VIEW_BILL_TO_ORDER example: If Customer 1 has placed an order for which Customer 1 is the sold-to, but Customer 2 is the bill-to, then when a user is logged in on behalf of Customer 2, he/she can view the order.

With both permissions, IBE_VIEW_ORDER and IBE_VIEW_BILL_TO_ORDER, B2B users can view their orders or organization orders, with the following differences:

- In the case of IBE_VIEW_ORDER, the logged in user's session account will be matched with the sold-to account of the order.
- In the case of IBE_VIEW_BILL_TO_ORDER, the logged in user's session account will be matched with the bill-to account of the order
- In the case of IBE_VIEW_BILL_TO_ORDER and IBE_VIEW_ORDER, the logged in user's session account will be matched with the sold-to account of the order.
- In the case where none of the permissions is present, the logged in user's session account will be matched with the sold-to account of the order and also the order should be placed by the logged in user.

Note that B2B users can always view orders they have placed, with or without these permissions. These permissions simply capture additional orders in the view that otherwise would not be viewable.

Additional Guidelines

The following information can aid your understanding of these permissions.

- User permissions (which in Oracle Applications are housed inside user roles) apply only to B2B users in Oracle iStore. B2C users in Oracle iStore do not have roles or permissions.
- The current profile option, IBE: Use Auth Permissions in Order Tracker, specifies if permission checking is enforced in Order Tracker.
- The account used in the application's query is always the logged in user's session account.

- For B2B users, if both permissions (IBE_VIEW_ORDER and IBE_VIEW_BILL_TO_ORDER) are assigned, then IBE_VIEW_ORDER takes precedence, and hence, B2B users will see orders based on the sold-to account.
- If neither permission is present in his user role, then the B2B user can only see orders placed by himself (based on sold-to account).
- Also refer to the profile option, IBE: View-By Customer Orders in Order Tracker, in the "Profile Options" appendix.

IBE_VIEW_PAYMENT

Allows a user to view payments related to the entire organization, through Order Tracker. Oracle iStore checks this permission only if the profile option, IBE: Use Auth Permissions in Order Tracker, is set to Yes.

IBE_VIEW_RETURN_ORDER

Allows a user to view all returns placed within his organization in the Order Tracker pages. Only checked if the profile option, IBE: Use Auth Permissions in Order Tracker, is set to Yes.

IBE_INT_ADMINISTRATORS

Gives users permission to view primary users of the organization in the Company Profile screens.

IBE_INT_ASSIGN_ACCOUNTS

Gives users permission to assign accounts in the User Management screens.

IBE_INT_ASSIGN_ROLES

Gives users permission to assign roles in the User Management screens.

IBE_INT_MANAGE_CONTACT

Gives users permission to create new and update existing organization contacts and users in the User Management screens.

IBE_INT_MANAGE_CONTACT_INFO

Gives users permission to update, create, and delete corporate addresses, e-mail addresses, phone numbers, and telex numbers in the Company Profile screens.

Note: The following permissions also need to be assigned to allow users change the primary address and set it as Preferred Shipping/Billing address:

IBE_CREATE_SHIPTO_CONTACT_ADDRESS

IBE_CREATE_BILLTO_CONTACT_ADDRESS

IBE_INT_ORG_ADDRESS_BOOK

Gives users permission to view company address book in the Company Profile screens.

IBE_INT_ORG_DETAILS

Gives users permission to view organization details in the Company Profile screens.

IBE_INT_ORG_EMAIL_ADDRESSES

Gives users permission to view e-mail addresses of the company in the Company Profile screens.

IBE_INT_ORG_PHONE_NUMBERS

Gives users permission to view phone numbers of the company functionality in the Company Profile screens.

IBE_INT_ORG_TELEX_NUMBERS

Gives users permission to view telex numbers of the company in the Company Profile screens.

IBE_INT_PENDING_APPROVAL

Gives users permission to approve users of the organization in the Pending Approval screens.

IBE_INT_PRIMARY_USER

Gives users permission to identify a user as primary user in the Administration screens.

IBE_INT_ROLE_MANAGEMENT

Gives users permission to create and update roles in the Role Management screens.

IBE_INT_UPDATE_ORG_DETAILS

Gives users permission to update organization details in the Company Profile screens.

IBE_INT_USER_MANAGEMENT

Gives users permission to access User Management screens.

JTF_PRIMARY_USER_SUMMARY

Oracle CRM Common Application Components permission which allows a primary user to approve pending registration requests.

iStore Permissions Not Supported

The following permissions are not currently supported. Although they may appear in some seeded user roles, they are non-functional.

- IBE_CREATE_ADDRESS
- IBE_CREATE_PAYMENT_INSTRUMENT
- IBE_CREATE_SOLDTO_CUSTOMER

- IBE_MODIFY_CART
- IBE_MODIFY_ORDER
- IBE_OVERRIDE_ITEM_PRICE
- IBE_ROLE_ADMIN
- IBE_USER_ADMIN
- IBE_VIEW_ADDRESS
- IBE_VIEW_PAYMENT_INSTRUMENT
- IBE_INT_CONTACT_DETAILS

Site Management User Type Definitions

This section contains information on the seeded site management user type definitions for Oracle iStore, Oracle iSupport, and Oracle Partner Management which are supported in the Oracle iStore Customer UI.

Note the following:

- All Partner Management and iStore user types in this section are owned by or associated to Oracle iStore. The iSupport user types are owned by Oracle iSupport, but they use Oracle iStore templates.
- iStore enrollments are owned by Oracle iStore; iSupport enrollments are owned by Oracle iSupport; partner enrollments are owned by Oracle Partner Management.
- All enrollments use the Generic Template.
- For a list of registration template seed data, see the section, "Site Management User Registration Templates", below.
- See the *Oracle Common Application Components Implementation Guide's* User Management chapter for information about configuring user types, enrollments, and registration templates.

Individual Users

This section contains information about default data for the individual (B2C) user registration, including the seeded user type and the Oracle iStore and Oracle iSupport enrollments seeded within this user type.

Individual User Type

- User Type Name --- Register as individual
- Key --- IBE_INDIVIDUAL
- Registration Template --- iStore Individual User
- Status --- Active
- Business Usage --- This user type is designed for B2C users who will be accessing either Oracle iStore alone, or if integrating Oracle iStore and Oracle iSupport in site management, also accessing Oracle iSupport.
- Approvals --- No approval required

User Type for Online Access to Existing Account

- User Type Name --- Need online access to your existing individual account?
- Registration Template --- iStore Individual User Partial
- Status --- Inactive
- Business Usage --- This user type is designed for B2C users who will be registering with Oracle iStore using the Online Access to Existing Account functionality.
- Approvals --- No approval required

iStore Enrollment for B2C Users

- Enrollment Name --- iStore (Individual User)
- Key --- IBE_INDIVIDUAL
- Responsibility --- IBE_CUSTOMER
- Role --- None
- Status --- Enabled

iSupport Enrollment for B2C Users

- Enrollment Name --- Support Site: Individual User
- Key --- IBU_INDIVIDUAL_USER
- Responsibility --- iSupport Site: Individual User
- Role --- IBU_REGULAR_USER
- Status --- Enabled

Non-Administrative B2B Users

This section contains information about default data for the non-administrative business (B2B) user registration, including the seeded user type and the Oracle iStore and Oracle iSupport enrollments seeded within this user type.

Regular Business User Type

- User Type Name --- Register as a user of an existing company
- Key --- IBE_BUSINESS
- Registration Template --- iStore Business User
- Status --- Active
- Business Usage --- This user type is designed for non-administrative B2B users who will be accessing either Oracle iStore alone, or if integrating Oracle iStore and Oracle iSupport in site management, also accessing Oracle iSupport.
- Approvals --- Approval required

User Type for Online Access to Existing Account

- User Type Name --- Need online access to your existing corporate account?
- Registration Template --- iStore Business User Partial
- Status --- Inactive
- Business Usage --- This user type is designed for B2B non-administrative users who will be registering with Oracle iStore using the Online Access to Existing Account functionality.
- Approvals --- Approval required

iStore Enrollment for Regular B2B Users

- Enrollment Name --- iStore (Business User)
- Key --- IBE_BUSINESS
- Responsibility --- IBE_CUSTOMER
- Role --- IBE_BUSINESS_USER_ROLE
- Status --- Enabled

iSupport Enrollment for Regular B2B Users

- Enrollment Name --- Support Site: Business User
- Key --- IBU_BUSINESS_USER
- Responsibility --- iSupport Site: Business User
- Role --- IBU_BUSINESS_USER
- Status --- Enabled

Primary B2B Users

This section contains information about default data for the Primary (administrative) business (B2B) user registration, including the seeded user type and the Oracle iStore and Oracle iSupport enrollments seeded within this user type.

Primary B2B User Type

- User Type Name --- Register your company
- Key --- IBE_PRIMARY
- Registration Template --- iStore Primary User
- Status --- Active
- Business Usage --- This user type is designed for B2B administrative (primary) users who will be accessing either Oracle iStore alone, or if integrating Oracle iStore and Oracle iSupport in site management, also accessing Oracle iSupport. Organizations for these users have not yet been registered in the system.
- Approvals --- No approval required

iStore Enrollment for B2B Primary Users

- Enrollment Name --- iStore (Primary User)
- Key --- IBE_PRIMARY
- Responsibility --- IBE_CUSTOMER
- Role --- IBE_BUSINESS_USER_ROLE and IBE_PRIMARY_USER_ROLE
- Status --- Enabled

iSupport Enrollment for B2B Primary Users

- Enrollment Name --- Support Site: Primary User

- Key --- IBU_PRIMARY_USER
- Responsibility --- iSupport Site: Primary User
- Role --- IBU_PRIMARY_USER and IBU_BUSINESS_USER
- Status --- Enabled

Partner Non-Administrative Users

This section contains information about default data for the Oracle Partner Management non-administrative business (B2B) user registration, including the seeded user type and the Oracle iStore and Oracle Partner Management enrollments seeded within this user type.

Regular B2B Partner User Type

- User Type Name --- Register as a user of an existing partner
- Key --- IBE_PARTNER_BUSINESS
- Registration Template --- Partner Business User
- Status --- Inactive
- Business Usage --- This user type is designed Oracle Partner Management B2B non-administrative users who will be accessing both Oracle iStore and Oracle Partner Management.
- Approvals --- Approval required

iStore Enrollment for Regular B2B Partner Users

- Enrollment Name --- iStore (Business User)
- Key --- IBE_BUSINESS
- Responsibility --- IBE_CUSTOMER
- Role --- IBE_BUSINESS_USER_ROLE
- Status --- Enabled

Partner Enrollment for Regular B2B Partner Users

- Enrollment Name --- Partner Business User
- Key --- PV_BUSINESS_USER

- Responsibility --- Partner Business User
- Role --- PV_PARTNER_BUSINESS_USER
- Status --- Enabled

Partner Primary Users

This section contains information about default data for the Oracle Partner Management Primary (administrative) business (B2B) user registration, including the seeded user type and the Oracle iStore and Oracle Partner Management enrollments seeded within this user type.

Partner Primary User Type

- User Type Name --- Register as a partner
- Key --- IBE_PARTNER_PRIMARY
- Registration Template --- Partner Primary User
- Status --- Inactive
- Business Usage --- This user type is designed for Oracle Partner Management B2B administrative users (primary users) who will be accessing both Oracle iStore and Oracle Partner Management.
- Approvals --- No approval required

iStore Enrollment for Partner Primary Users

- Enrollment Name --- iStore (Business User)
- Key --- IBE_BUSINESS
- Responsibility --- IBE_CUSTOMER
- Role --- IBE_BUSINESS_USER_ROLE
- Status --- Enabled

Partner Enrollment for Partner Primary Users

- Enrollment Name --- Partner Primary User
- Key --- PV_PRIMARY_USER
- Responsibility --- Partner Primary User

- Role --- PV_PARTNER_PRIMARY_USER and PV_PARTNER_BUSINESS_USER
- Status --- Enabled

Important: For the most current information on seeded user data for Oracle Partner Management and Oracle iSupport, see the product documentation for these applications.

Site Management User Registration Templates

This section contains data for the user registration templates used for site management. For user management Display Templates, see the section, "User Management Display Templates", in the "Seeded Display Data" appendix.

iStore Individual User Registration Template

Following are details about the iStore Individual User Registration Template:

- Template Name --- iStore Individual User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_INDIVIDUAL
- Template Handler --- oracle.apps.ibe.um.RegisterIndividual
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_B2C_CREATE_D

iStore Regular B2B User Registration Template

Following are details about the iStore Regular B2B User Registration Template:

- Template Name --- iStore Business User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_BUSINESS
- Template Handler --- oracle.apps.ibe.um.RegisterBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_BUSINESS_CREATE_D

iStore Primary B2B User Registration Template

Following are details about the Primary B2B User Registration Template:

- Template Name --- iStore Primary User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_PRIMARY
- Template Handler --- oracle.apps.ibe.um.RegisterBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_PRI_CREA
TE_D

Partner Regular B2B User Registration Template

Following are details about the Partner Regular B2B User Registration Template:

- Template Name --- Partner Business User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_PARTNER_BUSINESS
- Template Handler --- oracle.apps.ibe.um.RegisterPartnerBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_BUSPARTN
ER_CREATE_D

Partner Primary B2B User Registration Template

Following are details about the Partner Primary B2B User Registration Template:

- Template Name --- Partner Primary User
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_PARTNER_PRIMARY
- Template Handler --- oracle.apps.ibe.um.RegisterPartnerBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_PARTNER_
CREATE_D

Online Access to Existing Account B2B User Registration Template

Following are details about the Online Access to Existing Account B2B User Registration Template:

- Template Name --- iStore Business User Partial
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_BUSINESS_PARTIAL
- Template Handler --- oracle.apps.ibe.um.RegisterBusiness
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_BUSINESS_CREATE_PARTIAL_D

Online Access to Existing Account Individual User Registration Template

Following are details about the Online Access to Existing Account Individual User Registration Template:

- Template Name --- iStore Individual User Partial
- Template Type --- USERTYPE TEMPLATE
- Template Key --- IBE_INDIVIDUAL_PARTIAL
- Template Handler --- oracle.apps.ibe.um.RegisterIndividual
- Page Name --- ibeCZzpGetTemplateFile.jsp?
tmp=STORE_REG_CONTAINER_D&usertype_template=STORE_REG_B2C_CREATE_PARTIAL_D

Site Management Profile Pages Permissions

This section contains information about site management user permissions involved in controlling the profile pages in the Customer UI.

For information about the script which automatically updates existing roles with new permissions, see the section, "Permission Migration Script", later in this chapter

Profile Pages Permissions Overview

Functionality within the Administration (user management) and Profile screens can be controlled through permissions within the roles awarded to B2B users. Each role is associated to a set of permissions. For B2C users, permissions are not used; thus, B2C

users always see the same set of screens.

When integrating with other applications, different menus for each application can be configured for Profile and Administration functionality. To enable the menus, each menu is associated in Oracle Forms to the corresponding application responsibility. Each menu *function* is associated to a specific permission. For more information on integrating with Oracle iSupport and Oracle Partner Management, see the chapters, "Integrating Oracle iStore with Oracle iSupport" and "Integrating Oracle iStore with Oracle Partner Management". In a common implementation, the menus are the same in each application.

In an integrated environment, access to common screens is controlled by permissions that are shared across the different primary and non-primary users' roles. Screens that are application-specific are associated to permissions that should be assigned only to the appropriate roles.

Following are the codes used within the permissions:

- INT is used within all common permissions
- IBE prefixes Oracle iStore permissions
- IBU prefixes Oracle iSupport permissions
- PV prefixes Oracle Partner Management permissions

Oracle iStore B2C users typically are associated to the IBE_CUSTOMER responsibility, which is tied to a generic menu associated to user pages within the Profile menu. Further permissions within the B2B roles allow access to specific application functions, such as Company Profile and user administration functionality. Typically, only users with the iStore Business User role can access the Company Profile screens. And, by default, only users with iStore Primary User role can access the Administration screens.

Additional access to functionality in the Profile pages can be provided for users of Oracle iSupport and Oracle Partner Management, by assigning the permissions that correspond to the functionality desired. See the sections, "Roles and Permissions Combinations for Oracle iSupport" and "Roles and Permissions Combinations for Oracle Partner Management", in this chapter, for recommended setups.

By default, any user registering using *Register as individual*, *Register your company*, and *Register as a user of an existing company* user types will receive the same level of Profile page permissions in Oracle iStore.

Permissions for User Pages

Following are the user Profile page permissions for Oracle iSupport and Oracle Partner Relationship Management. No specific permissions are needed for Oracle iStore users to access these pages.

Oracle iSupport Permissions:

- **IBU_UPDATE_SUPPORT_PREFERENCES** --- Ability to set support preferences, such as those for subscriptions and forums
- **IBU_VIEW_SUPPORT_PREFERENCES** --- Ability to view support preferences

Oracle Partner Management Permissions:

- **PV_PARTNER_USER_PROFILE** --- Ability to access and update partner attributes associated to the partner user
- **PV_SALES** --- Ability to set sales preferences
- **PV_VIEWS** --- Ability to set default searches and delete them

Permissions for Company Pages

Following are the permissions for company Profile pages. The code INT is included in common permissions. See the section, "Oracle iStore B2B User Permissions Descriptions", in this chapter, for descriptions of the common permissions.

Common Permissions:

- **IBE_INT_ORG_DETAILS**
- **IBE_INT_ADMINISTRATORS**
- **IBE_INT_ORG_ADDRESS_BOOK**
- **IBE_INT_ORG_EMAIL_ADDRESSES**
- **IBE_INT_ORG_PHONE_NUMBERS**
- **IBE_INT_ORG_TELEX_NUMBERS**
- **IBE_INT_UPDATE_ORG_DETAILS**
- **IBE_INT_MANAGE_CONTACT_INFO**

Oracle Partner Management Permissions:

- **PV_PARTNER_ORG_PROFILE** --- Ability to view and update partner profile for the organization
- **PV_VIEW_MEMBERSHIPS** --- Ability to view memberships
- **PV_UPDATE_MEMBERSHIP** --- Ability to view and upgrade/renew membership
- **PV_CHANNEL_TEAM** --- Ability to view channel team screen

Permissions for Administration Pages

Following are the permissions for administration pages. The code INT is included in common permissions. See the section, "Oracle iStore B2B User Permissions Descriptions", in this chapter, for descriptions of the common permissions.

Common Permissions:

- IBE_INT_USER_MANAGEMENT
- IBE_INT_MANAGE_CONTACT
- IBE_INT_PENDING_APPROVAL
- IBE_INT_ROLE_MANAGEMENT
- IBE_INT_MANAGE_CONTACT_INFO
- IBE_INT_ASSIGN_ROLES
- IBE_INT_ASSIGN_ACCOUNTS
- IBE_INT_PRIMARY_USER

Oracle iStore Permissions:

- IBE_ASSIGN_SITES

Oracle Partner Management Permissions:

- PV_PARTNER_PROFILE --- Ability to view partner user profile
- PV_PARTNER --- Necessary for the framework to identify users as partner users

Roles and Permissions Combinations for Oracle iStore

Following are the typical page/permission assignments for Oracle iStore users in the Profile pages.

Individual Users (B2C)

Oracle iStore does not require roles and permissions for B2C users. B2C users will always be able to access the following pages:

User Pages

- Personal Information -- Details
- Contact Information -- Address Book (view and update); E-mail Addresses (view and update); Phone Numbers (view and update)

- Payment Book
- Accounts
- Preferences -- General; Orders

Business Users (B2B)

Within the default iStore Business User role, all B2C user pages permissions exist, plus additional ones for viewing company information. See the section, "Permissions for Company Pages", in this chapter.

Company Pages

- Company Information -- Details (view and update)
- Contact Information -- Address Book (view and update); E-mail Addresses (view and update); Phone Numbers (view and update); Telex (view and update)
- Administrators -- View a list of primary users

Primary Users

For the default Primary User role, all B2B regular user and company pages permissions exist, plus additional ones for user administration pages.

Administration Pages

- User Management -- Users Summary; Create User; Update User: Details, Roles, Sites, Accounts
- Pending Approvals
- Role Management

Roles and Permissions Combinations for Oracle iSupport

In an integrated environment, Oracle iSupport users should be assigned appropriate permissions to get access to the following functions, if business requirements comply:

IBU_REGULAR_USER

For the B2C users, all existing Oracle iSupport permissions can be assigned, plus other to access the following information:

- Support -- Subscriptions, Forums; see the section, "Permissions for User Pages", in this chapter

IBU_BUSINESS_USER

For regular B2B users, all B2C permissions can be assigned, plus new ones to access the

following information:

User Pages -- see the section, "Permissions for User Pages", in this chapter

- Personal Information -- Details, Change Password
- Contact Information -- Address Book; E-mail Addresses; Phone Numbers
- Accounts

Company Pages -- see the section, "Permissions for Company Pages", in this chapter

- Company Information --- Details
- Contact Information --- Address Book; E-mail Addresses; Phone Numbers; Telex
- Administrators

IBU_PRIMARY_USER

For the integration, assign all existing Oracle iSupport regular business user permissions, plus new ones to access the user administration pages:

Administration Pages -- see the section, "Permissions for Administration Pages", in this chapter

- User Management
- Users Summary
- Create User
- Update User --- Details, Roles, Enrollments, Accounts
- Pending Approvals
- Role Management

Roles and Permissions Combinations for Oracle Partner Management

For integration with Oracle Partner Relationship Management, the partner roles should be assigned appropriate permissions to get access to the following functions:

PV_BUSINESS_USER

Assign all existing Partner permissions, plus the new ones to access the following information:

User Pages -- see the section, "Permissions for User Pages", in this chapter

- Personal Information -- Details; Change Password

- Contact Information --- Address Book; E-mail Addresses; Phone Numbers
- Preferences --- Communications; Sales; Views

Company Pages -- see the section, "Permissions for Company Pages", in this chapter

- Company Information --- Details; Additional Information, Partner Profile
- Contact Information --- Address Book; E-mail Addresses; Phone Numbers; Telex
- Administrators
- Memberships --- View only
- Channel Team

PV_PRIMARY_USER

Assign all regular Partner user permissions for user and company pages, plus new ones to access the user administration pages:

Administration Pages -- see the section, "Permissions for Administration Pages", in this chapter

- User Management
- Users Summary
- Create User
- Update User --- Details, Roles, Accounts, Partner Profile
- Pending Approvals

Permission Migration Script

In Release 11.5.10, Oracle iStore seeds several new permissions designed to accommodate the integration of other applications, such as Oracle iSupport and Oracle Partner Management, into the site management functionality. These permissions contain the code, INT. Additionally, several Oracle iStore-specific user permissions have been added, and several have been obsoleted.

The iStore Permission Migration script maps new Release 11.5.10 permissions to all existing roles. The SQL script runs automatically when the Release 11.5.10 patch is applied. This supplies all existing users (pre-Release 11.5.10) with the necessary permissions to access their intended functionality in the Customer UI. The seeding is done for all roles which contain at least one of the Oracle iStore (IBE) permissions, including custom roles.

The following table shows the permission migration information.

Release 11.5.10 Permission Mapping to Pre-Release Permissions

Component	Permission Description	Pre-R11510 Permission	New Permissions
Sales Assistance	Permission to request sales assistance and to reject terms and conditions	None	IBE_ASK_SALES_ASSISTANCE
Checkout	Permission to checkout	None	IBE_CHECKOUT
Pricing	Permission to view discount prices	None	IBE_VIEW_NET_PRICE
User Management	Permission to create User Management screens	IBE_USER_ADMIN	IBE_INT_USER_MANAGEMENT
User Management	Permission to create/update new contact and user	IBE_USER_ADMIN	IBE_INT_MANAGE_CONTACT
User Management	Permission to view contact details	IBE_USER_ADMIN	BE_INT_CONTACT_DETAILS (unsupported)
User Management	Permission to assign roles	IBE_USER_ADMIN	IBE_INT_ASSIGN_ROLES
User Management	Permission to assign accounts	IBE_USER_ADMIN	IBE_INT_ASSIGN_ACCOUNTS
User Management	Permission to assign sites	IBE_USER_ADMIN	IBE_ASSIGN_SITES
Pending Approval	Permission to approve user registration	IBE_USER_ADMIN	IBE_INT_PENDING_APPROVAL

Component	Permission Description	Pre-R11510 Permission	New Permissions
Primary User	Permission to approve user registration	IBE_USER_ADMIN	JTF_PRIMARY_USER_SUMMARY
Primary User	Permission to identify users as primary user	IBE_USER_ADMIN	IBE_INT_PRIMARY_USER
Role Management	Permission to create and update roles	IBE_ROLE_ADMIN	IBE_INT_ROLE_MANAGEMENT
Company Profile	Permission to view organization detail	All roles which have IBE permissions	IBE_INT_ORG_DETAILS
Company Profile	Permission to view organization primary users	All roles which have IBE permissions	IBE_INT_ADMINISTRATORS
Company Profile	Permission to view address book	All roles which have IBE permissions	IBE_INT_ORG_ADDRESS_BOOK
Company Profile	Permission to view email addresses screen	All roles which have IBE permissions	IBE_INT_ORG_EMAIL_ADDRESSES
Company Profile	Permission to view phone numbers screens	All roles which have IBE permissions	IBE_INT_ORG_PHONE_NUMBERS
Company Profile	Permission to view Telex numbers screens	All roles which have IBE permissions	IBE_INT_ORG_TELEX_NUMBERS
Company Profile	Permission to update organization details	IBE_USER_ADMIN	IBE_INT_UPDATE_ORG_DETAILS
Company Profile	Permission to update, create, delete corporate addresses, email and phone numbers	IBE_USER_ADMIN	IBE_INT_MANAGE_CONTACT_INFO

Seeded Display Data

This appendix covers the following topics:

- Overview of Seeded Display Data Appendix
- Display Template Categories
- Catalog Display Templates
- Seeded Bin Display Templates
- Shopping Cart Display Templates
- Service Items Display Templates
- Descriptive Flexfield Display Templates
- Shopping List Display Templates
- Orders and Checkout Display Templates
- Express Checkout Display Templates
- Post Sales Display Templates
- Install Base Templates
- Returns Display Templates
- Available to Promise Display Templates
- User Management Display Templates
- Product Search Display Templates
- Catalog Punchout Display Templates
- Other Display Templates
- Oracle Configurator and BOM Integration Display Templates
- Oracle iSupport Integration Display Templates
- Oracle Partner Management Integration Display Templates
- Oracle Quoting Integration Display Templates

- Non-Current Display Templates
- Media Objects

Overview of Seeded Display Data Appendix

This appendix lists the Oracle iStore seeded display templates and media objects.

For an overview of how Oracle iStore uses Display Templates to present the Customer UI, see the "Implementing the Catalog" chapter.

Display Template Categories

Display Templates are categorized by the type of display they enable in a specialty site. The category is known as the *Applicable To* category. You can search by these categories in the Site Administration UI. Following are the seeded categories:

- Address Book
- Catalog Routing
- Checkout
- Common Components
- Component for Sections Containing Featured Subsections
- Component for Sections Containing Products Only
- Component for Sections Contain Navigational Subsections Only
- Configurator
- Contact Point
- Express Checkout
- Organization Profile
- Others
- Product Bin
- Product Search
- Post Sales
- Registration

- Registration Bin
- Returns
- Section Layout
- Section Contains Featured Subsection
- Section Contains Products Only
- Section Contains Navigational Subsections Only
- Shopping Cart
- Shopping Cart Bin
- Shopping List
- User Management
- User Profile
- Uncategorized section display templates

Catalog Display Templates

The following table lists the seeded Catalog Display Templates. Note that this table does not include the bins listed in the table, "Seeded Bins Display Templates", or the other catalog Display Templates listed in the section, "Service Items Display Templates", in this chapter.

Catalog Display Templates

Name	Prog. Access Name	Category	Description	Source File
Add Item Bin	STORE_CTLG_ADD_ITEM_BIN	Product Bin	Add Item Bin	ibeCCtdAddItemBin.jsp
Related Items	STORE_CTLG_RELATED_ITEMS	Others	Related item template to be used in the item details page and the shopping cart.	ibeCCtdRelatedItems.jsp

Name	Prog. Access Name	Category	Description	Source File
Catalog section common page	STORE_CTLG_SCT_COMMON	Section Layout	Common display page, with bins, center page, menu, etc.	ibeCCtdCmnSt.jsp
Multilevel Subsection List	STORE_CTLG_DLDN_SCT_BULLET	Section Contains Navigational Subsections Only	Parent section short description with all subsections and their child section names.	ibeCCtpDdLfStBl.jsp
Subsection List with product detail	STORE_CTLG_DRILL_LEAF	Section Contains Navigational Subsections Only	Parent section name, short description and image, subsection short description, and subsection small image content component, with subsections and their product detail	ibeCCtpDrillLeaf.jsp
Subsection List	STORE_CTLG_SCT_BULLET_SUBSECTION	Section Contains Navigational Subsections Only	Parent section short and long description plus additional information with Subsection List.	ibeCCtpStBlSuStBl.jsp
Subsection List with product pull-down list	STORE_CTLG_SUBSECTION_PULLDOWN_LIST	Section Contains Navigational Subsections Only	All subsection names, short descriptions, images and product pull-down list.	ibeCCtpChStDdlts.jsp

Name	Prog. Access Name	Category	Description	Source File
Subsection List 2	STORE_CTLG_S CTN_BULLET_S UBSCT	Section Contains Navigational Subsections Only	Parent section name, short description plus additional information with Subsection List.	ibeCCtpStNBISu St.jsp
Product detail	STORE_CTLG_F SUBSCT	Section Contains Featured Subsection	Parent section short description, long description and additional information, with products names, images and descriptions.	ibeCCtpFSubSct. jsp
Product multi-select	STORE_CTLG_F SUBSCT_MULT _2COL	Section Contains Featured Subsection	Parent section short description, long description and additional information with product multi-select.	ibeCCtpFSuStMs 2.jsp
Product multi-select with section link	STORE_CTLG_F SUBSCT_MULT _3COL	Section Contains Featured Subsection	Parent section short description, long description and additional information, with product multi-select and section link.	ibeCCtpFSuStMs 3.jsp
Product detail multi-select	STORE_CTLG_L EAF_SCT_ITEM S	Section Contains Products Only	Section short description with product multi-select. Includes product names, small images and descriptions.	ibeCCtpLfStIts. jsp

Name	Prog. Access Name	Category	Description	Source File
Product multi-select with drill-down	STORE_CTLG_L EAF_SCT_MULTIPLE	Section Contains Products Only	Section short description, long description and additional information with product multi-select and link to product detail.	ibeCCtpLfStMsL.jsp
Product detail	STORE_CTLG_L EAF_SCT_SINGLE	Section Contains Products Only	Section name, short description and image, with product names, small images and descriptions.	ibeCCtpLeafSctS.jsp
Product multi-select	STORE_CTLG_L F_SCT_MULT_NOLINKS	Section Contains Products Only	Section short description, long description and additional information with product multi-select.	ibeCCtpLfStMs.jsp
Product pull-down	STORE_CTLG_S CT_DTL_DPDN_ITEMS	Section Contains Products Only	Section name, image, long description and additional information with product pull-down list.	ibeCCtpStMmDIts.jsp
Multilevel subsection list include	STORE_SECT_MULTILEVEL_SUBSECTION_INCL	Component for Sections Contain Navigational Subsections Only	Shows list of multilevel subsections associated with generic content and configurable layout, included in another page	ibeCCtdStMISubStL.jsp

Name	Prog. Access Name	Category	Description	Source File
Section Detail include	STORE_SECT_DETAIL_INCL	Component for Sections Containing Products Only	Shows section detail with generic content and configurable layout, included in another page	ibeCCtdStDetI.jsp
Product basic information	STORE_CTLG_ITEM_DESC	Product	Product name and description.	ibeCCtdItemDesc.jsp
Product basic information with image	STORE_CTLG_ITEM_DESC_AND_IMG	Product	Product name, description and large image.	ibeCCtdItemDescImg.jsp
Product detail without image	STORE_CTLG_ITEM_DETAILS_NO_IMG	Product	Product name, description, additional information, flexfields and related products.	ibeCCtdItemDetailNoImg.jsp
Product detail with image	STORE_CTLG_ITEM_DETAILS	Product	Product name, description, large image, additional information, flexfields and related products.	ibeCCtdItemDetail.jsp
Product additional information	STORE_CTLG_ITEM_INFO	Product	Product additional information	ibeCCtdItemInfo.jsp
Subsection List (multi-level) include	STORE_CTLG_DLDN_SCT_BULLET_INCL	Component for Sections Contain Navigational Subsections Only	Parent section short description with all subsections and their child section names.	ibeCCtdDdLfStBll.jsp

Name	Prog. Access Name	Category	Description	Source File
Subsection List with product detail include	STORE_CTLG_ DRILL_LEAF_I NCL	Component for Sections Contain Navigational Subsections Only	Parent section name, short description and image, with subsections and their product detail.	ibeCCtdDrillLeafI.jsp
Subsection List include	STORE_CTLG_S CT_BULLET_SU BSCT_INCL	Component for Sections Contain Navigational Subsections Only	Parent section short and long description plus additional information with Subsection List.	ibeCCtdStBISuStI.jsp
Subsection List with product pull-down list include	STORE_CTLG_S UBSCT_DPDN_I TEMS_INCL	Component for Sections Contain Navigational Subsections Only	All subsection names, short descriptions, images and product pull-down list.	ibeCCtdChStDdItsl.jsp
Subsection List 2 Include	STORE_CTLG_S CTN_BULLET_S UBSCT_INCL	Component for Sections Contain Navigational Subsections Only	Parent section name, short description plus additional information with Subsection List.	ibeCCtdStNBISuStI.jsp
Product detail include	STORE_CTLG_F SUBSCT_INCL	Component for Sections Containing Featured Subsections	Product detail includeSTORE_CTLG_FSUBSCT_INCLParent section short description, long description and additional information, with products names, images and descriptions.	ibeCCtdFSubSctI.jsp

Name	Prog. Access Name	Category	Description	Source File
Product multi-select include	STORE_CTLG_F SUBSCT_MULT _2COL_INCL	Component for Sections Containing Featured Subsections	Parent section short description, long description and additional information with product multi-select.	ibeCCtdFSuStMs2I.jsp
Product multi-select with section link include	STORE_CTLG_F SUBSCT_MULT _3COL_INCL	Component for Sections Containing Featured Subsections	Parent section short description, long description and additional information, with product multi-select and section link.	ibeCCtdFSuStMs3I.jsp
Product detail multi-select include	STORE_CTLG_L EAF_SCT_ITEM S_INCL	Component for Sections Containing Products Only	Section short description with product multi-select. Includes product names, small images and descriptions.	ibeCCtdLfStItsI.jsp
Product multi-select with drill-down include	STORE_CTLG_L EAF_SCT_MULT_INCL	Component for Sections Containing Products Only	Section short description, long description and additional information with product multi-select and link to product detail.	ibeCCtdLfStMsLl.jsp
Product detail include	STORE_CTLG_L EAF_SCT_SINGLE_INCL	Component for Sections Containing Products Only	Section name, short description and image, with product names, small images and descriptions.	ibeCCtdLeafSctSsI.jsp

Name	Prog. Access Name	Category	Description	Source File
Product multi-select include	STORE_CTLG_L F_SCT_MULT_ NOLINKS_INCL	Component for Sections Containing Products Only	Section short description, long description and additional information with product multi-select.	ibeCCtdLfStMsI.jsp
Product pull-down include	STORE_CTLG_S CT_DTL_DPDN _ITEMS_INCL	Component for Sections Containing Products Only	Section name, image, long description and additional information with product pull-down list.	ibeCCtdStMmDtItsI.jsp
Catalog Section Show Media	STORE_CTLG_S HOW_MEDIA	Uncategorized section	Displays common section layout. In the center of the page, embeds logical media passed in as parameter.	ibeCCtpShowMedia.jsp
Catalog Section Forward to Subsection page	STORE_CTLG_F SUBSCT_FWD	Uncategorized section display templates	Display featured sub sections or forward to first navigational child	ibeCCtpFwdSubSct.jsp
Catalog Section Show Media Include	STORE_CTLG_S HOW_MEDIA_I NCL	Components for Section	Displays common section layout. In the center of the page, embeds logical media passed in as parameter.	ibeCCtdShowMediaI.jsp
Store Content Center Page	STORE_CTLG_C T_CONTENT	Components for Section	Store Content Center Page	ibeCCtdContentI.jsp

Name	Prog. Access Name	Category	Description	Source File
Catalog Section Path	STORE_CTLG_SCT_PATH	Components for Section	Displays path traversed in hierarchy	ibeCCtdSctPath.jsp
Store footer generation template	STORE_CTLG_BOTTOM_PAGE	Common Components	Store footer page	ibeCCtdBottom.jsp
Menu generation template	STORE_CTLG_MENU_PAGE	Common Components	Store menu page	ibeCCtdMenu.jsp
Specialty Store Display Page	STORE_CTLG_MSITE_DISPLAY	Common Components	Specialty Store Display Page	ibeCCtdMinisite.s.jsp
Store display settings	STORE_CTLG_TOP_PAGE	Common Components	Store look and feel display settings page	ibeCCtdTop.jsp
Catalog buy routing	STORE_CTLG_BUY_PROCESS_ROUTE	Catalog Routing	Routing page for Add to Cart, Express Checkout, etc.	ibeCCtpBuyRoute.jsp
Catalog item route	STORE_CTLG_ITEM_ROUTE	Catalog Routing	Item display routing	ibeCCtpItemDisplayRoute.jsp
Catalog section display routing	STORE_CTLG_SECTION_ROUTE	Catalog Routing	Display routing page	ibeCCtpSectionDisplayRoute.jsp
Configurable Layout	STORE_SCT_CONFIGURABLE_LAYOUT	Section Layout	Section Layout with Configurable Bins	ibeCCtdCommonSectionLayout.jsp
Catalog bullet sections	STORE_CTLG_BULLET_SCT	Others	List of sections in 2 columns with bullets	ibeCCtdBulletSections.jsp
Catalog Item Drop Down URL	STORE_CTLG_ITEM_DROP_DOWN_URL	Others	URL for item drop down header link	None

Name	Prog. Access Name	Category	Description	Source File
Product name and description Include	STORE_CTLG_L EAF_ITEM_INC L	Others	Product name and description within section page.	ibeCCtdLeafItem.jsp
Catalog item route	STORE_CTLG_I TEM_ROUTE	Catalog Routing	Item display routing	ibeCCtpItmDspRte.jsp

Seeded Bin Display Templates

The following tables list the seeded bins for the Customer Application. Note that this does not include bins seeded for Oracle iSupport or Oracle Partner Management. See also: "Oracle Partner Management Integration Display Templates" and "Oracle iSupport Integration Display Templates" section.

Site Management Bins

Name	Prog. Access Name	Category	Description	Source File
Store Group Bin	STORE_GROUP_BIN_IBEWC	Display Templates for section	Displays list of sites assigned to Store group	ibeCAcdGroupSiteBin.jsp?groupCode=STORE
Support Group Bin	SUPPORT_GROUP_BIN_IBEWC	Display Templates for section	Displays list of sites assigned to Support group	ibeCAcdGroupSiteBin.jsp?groupCode=SUPPORT
Partner Group Bin	PARTNER_GROUP_BIN_IBEWC	Display Templates for section	Displays list of sites assigned to Partner group	ibeCAcdGroupSiteBin.jsp?groupCode=PARTNER
Quick Links Bin	STORE_QUICK_LINKS_BIN_IBEWC	Display Templates for section	Display responsibility menu links	ibeCAcdQuickLinkBin.jsp

Initial Pages Bins

Name	Prog. Access Name	Category	Description	Source File
Account Switcher bin	STORE_CTLG_ACCOUNT_SWITCHER_BIN	Component for Sections	See the "Account Switcher Bin" section in the "Implementing Customer Application Initial Pages" chapter	ibeCAcdAcctSwitcher.jsp
Browse Bin	STORE_CTLG_SCT_BROWSE	Components for Section	See the "Browse Bin" section in the "Implementing Customer Application Initial Pages" chapter	ibeCCtdSctBrwsBin.jsp
Global Store Bin	STORE_GLOBAL_STORE_BIN	Components for Section	See the "Global Bin" section in the "Implementing Customer Application Initial Pages" chapter	ibeCAcdGlobal.jsp
Site Selection Bin Left 1	SITE_SELECTION_BIN_LEFT_1		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Site Selection Bin Left 2	SITE_SELECTIO N_BIN_LEFT_2		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Left 3	SITE_SELECTIO N_BIN_LEFT_3		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Left 4	SITE_SELECTIO N_BIN_LEFT_4		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Left 5	SITE_SELECTIO N_BIN_LEFT_5		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Left 6	SITE_SELECTIO N_BIN_LEFT_6		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Site Selection Bin Left 7	SITE_SELECTIO N_BIN_LEFT_7		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Right 1	SITE_SELECTIO N_BIN_RIGHT_1		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Right 2	SITE_SELECTIO N_BIN_RIGHT_2		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Right 3	SITE_SELECTIO N_BIN_RIGHT_3		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Right 4	SITE_SELECTIO N_BIN_RIGHT_4		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Site Selection Bin Right 5	SITE_SELECTIO N_BIN_RIGHT_ 5		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Right 6	SITE_SELECTIO N_BIN_RIGHT_ 6		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Right 7	SITE_SELECTIO N_BIN_RIGHT_ 7		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Top	SITE_SELECTIO N_BIN_TOP		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	
Site Selection Bin Bottom	SITE_SELECTIO N_BIN_BOTTO M		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	

Name	Prog. Access Name	Category	Description	Source File
Site Selection Bin Middle 1	SITE_SELECTIO N_BIN_MIDDLE _1		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Middle 2	SITE_SELECTIO N_BIN_MIDDLE _2		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Middle 3	SITE_SELECTIO N_BIN_MIDDLE _3		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None
Site Selection Bin Middle 4	SITE_SELECTIO N_BIN_MIDDLE _4		See the "Site Selection Page" section in the "Implementing Customer Application Initial Pages" chapter	None

Section and Item Detail Page Bins

Name	Prog. Access Name	Category	Description	Source File
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**Section Page
Bins**

Bin Left 1	STORE_CTLG_B IN_LEFT_1	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Left 2	STORE_CTLG_B IN_LEFT_2	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Left 3	STORE_CTLG_B IN_LEFT_3	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Left 4	STORE_CTLG_B IN_LEFT_4	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Left 5	STORE_CTLG_B IN_LEFT_5	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Left 6	STORE_CTLG_B IN_LEFT_6	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None

Bin Left 7	STORE_CTLG_B IN_LEFT_7	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Right 1	STORE_CTLG_B IN_RIGHT_1	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Right 2	STORE_CTLG_B IN_RIGHT_2	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Right 3	STORE_CTLG_B IN_RIGHT_3	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Right 4	STORE_CTLG_B IN_RIGHT_4	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Right 5	STORE_CTLG_B IN_RIGHT_5	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None

Bin Right 6	STORE_CTLG_B IN_RIGHT_6	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Bin Right 7	STORE_CTLG_B IN_RIGHT_7	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Section Bin Top	STORE_CTLG_S ECTION_BIN_T OP	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Section Bin Bottom	STORE_CTLG_S ECTION_BIN_B OTTOM	Components for Section	See the "Section Page Bins" section in the "Implementing the Catalog" chapter	None
Item Detail Page Bins				
Item Bin Top	STORE_CTLG_I TEM_BIN_TOP	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Bottom	STORE_CTLG_I TEM_BIN_BOTT OM	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None

Item Bin Left 1	STORE_CTLG_I TEM_BIN_LEFT _1	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Left 2	STORE_CTLG_I TEM_BIN_LEFT _2	Product Bin	Item Bin Left 2	None
Item Bin Left 3	STORE_CTLG_I TEM_BIN_LEFT _3	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Left 4	STORE_CTLG_I TEM_BIN_LEFT _4	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Left 5	STORE_CTLG_I TEM_BIN_LEFT _5	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Left 6	STORE_CTLG_I TEM_BIN_LEFT _6	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Left 7	STORE_CTLG_I TEM_BIN_LEFT _7	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None

Item Bin Right 1	STORE_CTLG_I TEM_BIN_RIGH T_1	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Right 2	STORE_CTLG_I TEM_BIN_RIGH T_2	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Right 3	STORE_CTLG_I TEM_BIN_RIGH T_3	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Right 4	STORE_CTLG_I TEM_BIN_RIGH T_4	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Right 5	STORE_CTLG_I TEM_BIN_RIGH T_5	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Item Bin Right 6	STORE_CTLG_I TEM_BIN_RIGH T_6	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None

Item Bin Right 7	STORE_CTLG_I TEM_BIN_RIGH T_7	Product Bin	See the "Item Detail Page Bins" section in the "Implementing the Catalog" chapter	None
Other bins				
Content Bin Error Template	STORE_CONTE NT_BIN_ERR	Common Components	Content Bin Error Template	None
Marketing Posting Bin	STORE_MARKE TING_POSTING _BIN	Display Templates for section	Display marketing postings	None

Shopping Cart Bins

Name	Prog. Access Name	Category	Description	Source File
Store Cart Items Bin Bottom	STORE_CART_I TEMS_BIN_BOT TOM	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Store Cart Items Bin Top	STORE_CART_I TEMS_BIN_TOP	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Left 1 bin on Shopping Cart page	STORE_CART_B IN_LEFT1	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Left 2 bin on Shopping Cart page	STORE_CART_B IN_LEFT2	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Left 3 bin on Shopping Cart page	STORE_CART_B IN_LEFT3	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Left 4 bin on Shopping Cart page	STORE_CART_B IN_LEFT4	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Left 5 bin on Shopping Cart page	STORE_CART_B IN_LEFT5	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Left 6 bin on Shopping Cart page	STORE_CART_B IN_LEFT6	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Left 7 bin on Shopping Cart page	STORE_CART_BIN_LEFT7	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Right 1 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT1	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Right 2 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT2	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Right 3 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT3	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Right 4 bin on Shopping Cart page.	STORE_CART_BIN_RIGHT4	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Right 5 bin on Shopping Cart page.	STORE_CART_B IN_RIGHT5	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Right 6 bin on Shopping Cart page.	STORE_CART_B IN_RIGHT6	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None
Right 7 bin on Shopping Cart page.	STORE_CART_B IN_RIGHT7	Shopping Cart Bin	See the "Shopping Cart Page Bins" section in the "Implementing the Catalog" chapter	None

Registration Page Bins

Name	Prog. Access Name	Category	Description	Source File
Registration Page 1st Left Bin	STORE_REG_LE FT1_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Registration Page 2nd Left Bin	STORE_REG_LE FT2_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None
Registration Page 3rd Left Bin	STORE_REG_LE FT3_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None
Registration Page 1st Right Bin	STORE_REG_RI GHT1_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None
Registration Page 2nd Right Bin	STORE_REG_RI GHT2_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None
Registration Page 3rd Right Bin	STORE_REG_RI GHT3_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None

Name	Prog. Access Name	Category	Description	Source File
Registration Page Bottom Bin	STORE_REG_BO TTOM_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None
Registration Page Top Bin	STORE_REG_TO P_D	Registration Bin	See the "Registration Page Bins" section in the "Implementing the Catalog" chapter	None

Install Base Bins

Name	Prog. Access Name	Category	Description	Source File
Instance Summary : Left Bin 1	STORE_PSI_IB_I NST_BIN_LEFT_ 1	Install Base Bins	Left Bin 1 in Instance Summary Page	None
Instance Summary : Left Bin 2	STORE_PSI_IB_I NST_BIN_LEFT_ 2	Install Base Bins	Left Bin 2 in Instance Summary Page	None
Instance Summary : Left Bin 3	STORE_PSI_IB_I NST_BIN_LEFT_ 3	Install Base Bins	Left Bin 3 in Instance Summary Page	None
Instance Summary : Left Bin 4	STORE_PSI_IB_I NST_BIN_LEFT_ 4	Install Base Bins	Left Bin 4 in Instance Summary Page	None
Instance Summary : Left Bin 5	STORE_PSI_IB_I NST_BIN_LEFT_ 5	Install Base Bins	Left Bin 5 in Instance Summary Page	None

Name	Prog. Access Name	Category	Description	Source File
Instance Summary : Left Bin 6	STORE_PSI_IB_I NST_BIN_LEFT_ 6	Install Base Bins	Left Bin 6 in Instance Summary Page	None
Instance Summary : Left Bin 7	STORE_PSI_IB_I NST_BIN_LEFT_ 7	Install Base Bins	Left Bin 7 in Instance Summary Page	None
Instance Summary : Right Bin 1	STORE_PSI_IB_I NST_BIN_RIGH T_1	Install Base Bins	Right Bin 1 in Instance Summary Page	None
Instance Summary : Right Bin 2	STORE_PSI_IB_I NST_BIN_RIGH T_2	Install Base Bins	Right Bin 2 in Instance Summary Page	None
Instance Summary : Right Bin 3	STORE_PSI_IB_I NST_BIN_RIGH T_3	Install Base Bins	Right Bin 3 in Instance Summary Page	None
Instance Summary : Right Bin 4	STORE_PSI_IB_I NST_BIN_RIGH T_4	Install Base Bins	Right Bin 4 in Instance Summary Page	None
Instance Summary : Right Bin 5	STORE_PSI_IB_I NST_BIN_RIGH T_5	Install Base Bins	Right Bin 5 in Instance Summary Page	None
Instance Summary : Right Bin 6	STORE_PSI_IB_I NST_BIN_RIGH T_6	Install Base Bins	Right Bin 6 in Instance Summary Page	None
Instance Summary : Right Bin 7	STORE_PSI_IB_I NST_BIN_RIGH T_7	Install Base Bins	Right Bin 7 in Instance Summary Page	None

Other Bins

Name	Prog. Access Name	Category	Description	Source File
Content Bin Error Template	STORE_CONTE NT_BIN_ERR	Common Components	Content Bin Error Template	None
Marketing Posting Bin	STORE_MARKETING_POSTING _BIN	Display Templates for section	Display marketing postings	None

Shopping Cart Display Templates

The following table lists seeded Display Templates for the Customer UI Shopping Cart. See the "Implementing Carts and Orders" chapter for more information.

Shopping Cart Display Templates

Name	Prog. Access Name	Category	Description	Source File
Shopping Carts Total Amounts	STORE_SHOP_CART_SUMMARY	Shopping Cart	This template is used to map cart total amount (tax, S&H, sub-total region) on shopping cart page.	To display shipping/handling and tax in the shopping cart, map to: ibrCScdShowCartSummary.jsp (this is the default mapping) To not display: map to ibrCScdShowShopCartSummary.jsp
Shopping Cart Add Item	STORE_CART_ADD_ITEM	Shopping Cart	Add Item to Cart Page	ibrCScpAddItem.jsp

Name	Prog. Access Name	Category	Description	Source File
B2B Share Cart - Add recipients display	STORE_CART_ADD_RCPT	Shopping Cart	B2B Share Cart - Add recipients display page	ibeCScdAddRecipients.jsp
B2B Share Cart - Add recipients processing	STORE_CART_ADD_RCPT_P	Shopping Cart	B2B Share Cart - Add recipients processing page	ibeCScpAddRecipients.jsp
Show Bundle Details	STORE_CART_BUNDLE_DETAILS	Shopping Cart	Displays model bundle details	ibeCScdBundDetails.jsp
Add Bundle or Education	STORE_CART_BUNDL_EDUC_P	Shopping Cart	Adds Bundle, adds Education, or adds Bundle w/ Education	ibeCScpBundEduc.jsp
Configuration Items Details Popup	STORE_CART_CFG_ITEMS	Shopping Cart	Configuration Items Details Popup	ibeCScdCfgItemsPopup.jsp
Controller page for My Carts/My Quotes pages	STORE_CART_CONTROL	Shopping Cart	Controller page for My Carts/My Quotes pages	ibeCScdListControl.jsp
Shop Cart Create Attachments	STORE_CART_CREATE_ATTACHMENT	Shopping Cart	Shop cart create attachments	ibeCScdCreateAttachment.jsp
Shop Cart Direct Entry	STORE_CART_DIRECT_ENTRY	Shopping Cart	Enter customers' inventory items to cart - direct entry	ibeCScdDirectEntry.jsp
Shop Cart Direct Entry Process	STORE_CART_DIRECT_ENTRY_P	Shopping Cart	Processes direct entries	ibeCScpDirectEntry.jsp
View Quote Discount Details Display Page	STORE_CART_DISCOUNTS	Shopping Cart	View Quote Discount Details Display Page	ibeCScdDiscounts.jsp

Name	Prog. Access Name	Category	Description	Source File
SHOPPING CART GET SHAREE	STORE_CART_GET_SHAREE	Shopping Cart	Retrieve sharee shopping cart	ibeCScdSharee.jsp
Included warranties display page	STORE_CART_INCVC_TBL	Shopping Cart	Included warranties display page	ibeCScdIncSvcTbl.jsp
Shopping cart line tax	STORE_CART_LINE_TAX	Shopping Cart	Shopping cart line tax display	None
Shop Cart List Agreements	STORE_CART_LIST_AGRMNT	Shopping Cart	Shop cart list agreements	ibeCScdListAgreement.jsp
Shop Cart List Agreements Process Page	STORE_CART_LIST_AGRMNT_P	Shopping Cart	Shop cart list agreements process page	ibeCScpListAgreement.jsp
Shop Cart List Attachments	STORE_CART_LIST_ATTACH	Shopping Cart	Shop cart list attachments	ibeCScdListAttachment.jsp
Store Cart List Include	STORE_CART_LIST_INCLUDE	Shopping Cart	This is a dynamic include page which will be used for both Quotes listing and list of Saved Carts page	ibeCScdListInclude.jsp
Share Cart - List recipients	STORE_CART_LIST_RCPTS	Shopping Cart	Share Cart - List recipients include page	ibeCScdListRecipients.jsp
Shopping Cart Sub Menu	STORE_CART_MENU	Shopping Cart	Shopping cart sub menu	ibeCScdMenu.jsp
Shopping Cart Modify	STORE_CART_MODIFY	Shopping Cart	Modify shopping cart	ibeCScdViewA.jsp
Shopping Cart Modify Process	STORE_CART_MODIFY_P	Shopping Cart	Modify shopping cart process page	ibeCScpViewA.jsp

Name	Prog. Access Name	Category	Description	Source File
Share Cart - Modify recipients	STORE_CART_MODIFY_RCPTS	Shopping Cart	Share Cart - Modify recipients display page	ibeCScdModifyRecipients.jsp
Share Cart - Modify recipients Processing	STORE_CART_MODIFY_RCPTS_P	Shopping Cart	Share Cart - Modify recipients Processing page	ibeCScpModifyRecipients.jsp
Shopping Cart Save	STORE_CART_SAVE	Shopping Cart	Save shopping cart	ibeCScdSave.jsp
Shopping Cart Save Process	STORE_CART_SAVE_P	Shopping Cart	Save shopping cart process page	ibeCScpSave.jsp
Save Cart Process	STORE_CART_SAVE_CONFIRM	Shopping Cart	Save Cart Process	ibeCScdConfirm.jsp
Save and Confirm	STORE_CART_SAVE_CONFIRM_P	Shopping Cart	Save and Confirm	ibeCScpConfirm.jsp
Support Levels	STORE_CART_SUPPORT_LVL	Shopping Cart	Support Levels	ibeCScdSupportLvl.jsp
Service details display page	STORE_CART_SERVICE_DETAILS	Shopping Cart	Service details display page	ibeCScdSvcDetails.jsp
Master Control page for b2b and b2c share cart	STORE_CART_SHARE	Shopping Cart	Master control page for both B2B and B2C share cart.	ibeCScdShare.jsp
List of all carts/Quotes Shared by cart owner	STORE_CART_SHARE_BY_INCLUDED	Shopping Cart	List of all carts/Quotes shared by cart owner	ibeCScdListSharedByUser.jsp

Name	Prog. Access Name	Category	Description	Source File
List of all carts/quotes shared to recipient	STORE_CART_SHARETOINCLUDE	Shopping Cart	List of all carts/quotes shared to recipient	ibeCScdListSharedToUser.jsp
B2B Share cart display	STORE_CART_SHARE_B2B	Shopping Cart	B2B Share cart display page	ibeCScdBShare.jsp
B2B Share cart processing	STORE_CART_SHARE_B2B_P	Shopping Cart	B2B Share cart processing page	ibeCScpBShare.jsp
B2C Share cart display	STORE_CART_SHARE_B2C	Shopping Cart	B2C Share cart display page	ibeCScdCShare.jsp
B2C Share cart processing	STORE_CART_SHARE_B2C_P	Shopping Cart	B2C Share cart processing page	ibeCScpCShare.jsp
Shared cart retrieval by retrieval number page	STORE_CART_SHARE_RETRIEVE	Shopping Cart	Shared cart retrieval by retrieval number page	ibeCScdShRetrieve.jsp
Shopping Cart View	STORE_CART_VIEW	Shopping Cart	View shopping cart	ibeCScdViewS.jsp
Shopping Cart View Process	STORE_CART_VIEW_P	Shopping Cart	View shopping cart process page	ibeCScpViewS.jsp
View Shopping Cart Line	STORE_CART_VIEW_LINE	Shopping Cart	View Shopping Cart Line	ibeCScdShowCartLines.jsp
Shopping Cart Lists View	STORE_CART_VIEW_LIST	Shopping Cart	View shopping cart lists	ibeCScdListS.jsp
Shopping Cart Lists View Process	STORE_CART_VIEW_LIST_P	Shopping Cart	View shopping cart lists process page	ibeCScpListS.jsp
Store Cart view Quote	STORE_CART_VIEW_QUOTE	Shopping Cart	Display page for Quote Details	ibeCScdViewQ.jsp

Name	Prog. Access Name	Category	Description	Source File
Store Cart view Quote Process	STORE_CART_VIEW_QUOTE_P	Shopping Cart	Processing page for displaying Quote Details	ibeCScpViewQ.jsp
Shared Cart Details	STORE_CART_VIEW_SHARED_CART	Shopping Cart	Shared Cart details for owner and recipients	ibeCScdViewSharedCart.jsp
Shared cart/quotes processing page	STORE_CART_VIEW_SHARED_CART_QUOTE_P	Shopping Cart	Shared cart/quotes processing page	ibeCScpViewSharedCartQuote.jsp
Shared Quote Details	STORE_CART_VIEW_SHARED_QUOTE	Shopping Cart	Shared quote details for owner and recipient	ibeCScdViewSharedQuote.jsp
View Shopping Cart Sum	STORE_CART_VIEW_SUM	Shopping Cart	View Shopping Cart Sum	ibeCScdShowCartSummary.jsp
Shopping Cart Warning Display	STORE_CART_WARN	Shopping Cart	Shopping Cart Warning Display	ibeCScdWarn.jsp
Shopping Cart Warning Process	STORE_CART_WARN_P	Shopping Cart	Shopping Cart Warning Process	ibeCScpWarn.jsp
Delete cart warning page	STORE_CART_WARN_DELETE	Shopping Cart	Delete cart warning page	ibeCScdWarnDelete.jsp
Delete cart warning processing page	STORE_CART_WARN_DELETE_P	Shopping Cart	Delete cart warning processing page	ibeCScpWarnDelete.jsp
View current agreement	STORE_AGRMNT_VIEW	Shopping Cart	View current agreement	ibeCScdAgrmntDetail.jsp
Agreement detail view processing	STORE_AGRMNT_VIEW_P	Shopping Cart	Processing page for agreement detail view	ibeCScpAgrmntDetail.jsp

Name	Prog. Access Name	Category	Description	Source File
Attachments create form	STORE_ATTCH_CREATE_FORM	Shopping Cart	Attachments create form	ibeCScdCreateAttachForm.jsp
Create attachment process	STORE_ATTCH_CREATE_P	Shopping Cart	Create attachment process	ibeCScpCreateAttach.jsp
Attachments list table	STORE_ATTCH_LIST	Shopping Cart	Attachments list table	ibeCScdListAttachTable.jsp
List attachments process	STORE_ATTCH_P	Shopping Cart	list attachments process	ibeCScpListAttach.jsp
Shop cart direct entry upload	STORE_CART_DIRECT_ENTRY_UPLOAD	Shopping Cart	Upload items to direct entry screen from a .csv file	ibeCScdDirectEntryUpload.jsp
Processing page for direct entry upload	STORE_CART_DIRECT_ENTRY_UPLOAD_P	Shopping Cart	Processing page to upload items from a .csv file	ibeCScpDirectEntryUpload.jsp
Additional Information page	STORE_CART_ADDINFO	Shopping Cart	Container page for cart and item level Additional Information	ibeCScdAdditionalInfo.jsp
Additional Information processing page	STORE_CART_ADDINFO_P	Shopping Cart	Shopping Cart common processing page for cart and Item level Additional Information	ibeCScpAdditionalInfo.jsp
Related Items page	STORE_CART_RELATED_ITEMS	Shopping Cart	Related Items display page for Shopping cart	ibeCCtdRelatedItems.jsp

Service Items Display Templates

The following table lists seeded Display Templates related to service items support in

the Customer UI . See the section, "Support for Service Items", in the "Implementing Products" chapter, for more information.

Service Items Display Templates

Name	Prog. Access Name	Category	Description	Source File
Store Cart Change Service	STORE_CART_CHANGE_SVC_P	Shopping Cart	Store Cart Change Service Processing Page	ibeCScpChangeSvc.jsp
Product Detail with Services	STORE_CTLG_SVA_SVC_LIST	Product	Product name, description, image, additional information, flexfields and services	ibeCCndSvaSvcList.jsp
Serviceable Product Detail	STORE_CTLG_SVA_DETAIL	Others	Component page to display the detail of the serviceable product	ibeCCtdSvaItmDt.jsp
Service Items List	STORE_CTLG_SVC_ITEM_LIST	Components for Section	Component page to display the list of service items with radio buttons	ibeCCtdSvcItmList.jsp
Display Serviceable Config Item	STORE_CART_SVA_CFG_ITEM	Shopping Cart	Display Serviceable Config Item	ibeCScdSvaCfgItem.jsp

Descriptive Flexfield Display Templates

The following table lists seeded Display Templates related to descriptive flexfield support. See the section, "Descriptive Flexfield Support", in the "Advanced Display" chapter, for more information.

Descriptive Flexfield Display Templates

Name	Prog. Access Name	Category	Description	Source File
Additional Information Header Display	STORE_CART_ADDINFO_HEA DER	Shopping Cart	Addnl Information Header Display	ibeCScdHdrAdditionalInfo.jsp
Additional Information Header Process	STORE_CART_ADDINFO_HEA DER_P	Shopping Cart	Addnl Information Header processing page	ibeCScpHdrAdditionalInfo.jsp
Additional Information Line List Display	STORE_CART_ADDINFO_LINE	Shopping Cart	Addnl Information Line Display	ibeCScdLineAdditionalInfo.jsp
Additional Information Line List processing page	STORE_CART_ADDINFO_LINE_P	Shopping Cart	Addnl Information Line processing page	ibeCScpLineAdditionalInfo.jsp
Additional Information Line Detail Display	STORE_CART_ADDINFO_LINEDETAIL	Shopping Cart	Addnl Info Line Detail Display	ibeCScdItemFFInfoDetail.jsp
Additional Information Line Detail processing page	STORE_CART_ADDINFO_LINEDETAIL_P	Shopping Cart	Addnl Info Line Detail processing page	ibeCScpItemFFInfoDetail.jsp
Additional Information Header Display	STORE_CART_ADDINFO_HEA DER	Shopping Cart	Addnl Information Header Display	ibeCScdHdrAdditionalInfo.jsp
Header Level Additional Information in Billing Page	STORE_CHKOUT_ADDINFO_HEADER	Checkout	Header Level Additional Information in Billing Page	ibeCCkdHdrBillPayFlex.jsp

Shopping List Display Templates

The following table lists seeded Display Templates for Shopping Lists. See the "Implementing Carts and Orders" chapter for more information.

Shopping List Display Templates

Name	Prog. Access Name	Category	Description	Source File
SHOP LIST ADD ITEM	STORE_SLIST_ADD_ITEM	Shopping List	Add items to a list	ibeCSldAddItems.jsp
SHOP LIST ADD ITEM PROCESS	STORE_SLIST_ADD_ITEM_P	Shopping List	Processes addition of items to list	ibeCSlpAddItems.jsp
SHOP LIST DISPLAY	STORE_SLIST_DISPLAY	Shopping List	Display shopping list	ibeCSldListDetail.jsp
SHOP LISTS DISPLAY	STORE_SLIST_DISPLAY_LIST	Shopping List	Displays shopping lists	ibeCSldLists.jsp
SHOP LIST PROCESS	STORE_SLIST_DISPLAY_LIST_P	Shopping List	Processes shopping lists	ibeCSlpLists.jsp
SHOP LIST PROCESS	STORE_SLIST_DISPLAY_P	Shopping List	Processes shopping list	ibeCSlpListDetail.jsp
SHOP LIST SAVE	STORE_SLIST_SAVE	Shopping List	Save a shopping list	ibeCSldSave.jsp
SHOP LIST SAVE ACTIVE CART PROCESS	STORE_SLIST_SAVE_ACTIVE_CART	Shopping List	Saving of shopping list to a active cart	ibeCSldSaveActive.jsp
ACTIVE CART PROCESS	STORE_SLIST_SAVE_ACTIVE_CART_P	Shopping List	Process saving of shopping list to a active cart	ibeCSlpSaveActive.jsp
SHOP LIST SAVE PROCESS	STORE_SLIST_SAVE_P	Shopping List	Process saving of shopping list	ibeCSlpSave.jsp
Shopping list warning page	STORE_SLIST_WARN	Shopping List	Warning page for shopping list	ibeCSldListWarn.jsp
Shopping list warning processing page	STORE_SLIST_WARN_P	Shopping List	Warning processing page for shopping list	ibeCSlpListWarn.jsp

Orders and Checkout Display Templates

The following table lists seeded Display Templates for checkout functionality in the Customer UI. See the "Implementing Carts and Orders" chapter for more information.

Orders and Checkout Display Templates

Name	Prog. Access Name	Category	Description	Source File
Order Confirm	STORE_ORDER_CONFIRM	Others	Confirm a order	ibeocnfm.jsp
Order Confirmation Process	STORE_ORDER_CONFIRM_P	Others	Processes an order confirmation	ibeocnfd.jsp
Order Edit	STORE_ORDER_EDIT	Others	Edit an order	ibeoedit.jsp
Order Edit Process	STORE_ORDER_EDIT_P	Others	Edit an order process page	ibeoedtd.jsp
Order Invoice Header	STORE_ORDER_INVOICE_HEADER	Others	Displays invoice header	ibeobhdr.jsp
Order Invoice Header Process	STORE_ORDER_INVOICE_HEADER_P	Others	Processes invoice header	ibeobhdd.jsp
Order Payment Options	STORE_ORDER_PAYMENT_OPTIONS_INCLUDE	Others	Include page for displaying payment options	ibeopmt.jsp
Order Ship Header	STORE_ORDER_SHIP_HEADER	Others	Displays the ship header	ibeoshdr.jsp
Order Ship Header Process	STORE_ORDER_SHIP_HEADER_P	Others	Processes a ship header	ibeoshdd.jsp
Order Ship Line	STORE_ORDER_SHIP_LINE	Others	Displays order ship line	ibeoslne.jsp

Name	Prog. Access Name	Category	Description	Source File
Order Ship Line Process	STORE_ORDER_SHIP_LINE_P	Others	Processes a ship line	ibeosInd.jsp
Displays Order Summary	STORE_ORDER_SUMMARY	Others	Displays order summary	ibeosumm.jsp
B2B Bill Payment Display Page	STORE_CHKOU T_B2B_INVOIC E_HEADER	Checkout	B2B Bill Payment Display Page	ibeCCkdBHdrBil lPay.jsp
B2B Bill Payment Process Page	STORE_CHKOU T_B2B_INVOIC E_HEADER_P	Checkout	B2B Bill Payment Process Page	ibeCCkpBHdrBil lPay.jsp
Processing Page for Line Billing	STORE_CHKOU T_B2B_INVOIC E_LINE_P	Checkout	Processing Page for Line Billing	ibeCCkpBHdrBil lPay.jsp
B2B Header Shipment Display Page	STORE_CHKOU T_B2B_SHIP_HE ADER	Checkout	B2B Header Shipment Display Page	ibeCCkdBHdrSh ip.jsp
B2B Shipment Process Page	STORE_CHKOU T_B2B_SHIP_HE ADER_P	Checkout	B2B Shipment Process Page	ibeCCkpBHdrSh ip.jsp
B2C Bill Payment Display Page	STORE_CHKOU T_B2C_INVOIC E_HEADER	Checkout	B2C Bill Payment Display Page	ibeCCkdCHdrBil lPay.jsp
B2C Header Shipment Display Page	STORE_CHKOU T_B2C_SHIP_H EADER	Checkout	B2C Header Shipment Display Page	ibeCCkdCHdrSh ip.jsp
Save Commitments	STORE_CHKOU T_COMMITME NT_SAVE	Checkout	Saves commitment information into the cart	ibeCCkpSaveCo mmitments.jsp

Name	Prog. Access Name	Category	Description	Source File
Select Commitment	STORE_CHKOU T_COMMITME NT_SELECT	Checkout	Shows available commitments and lets user select one	ibeCCkdSelectCommitment.jsp
Show Commitments	STORE_CHKOU T_COMMITME NT_SHOW	Checkout	Displays and assigns commitments for cart lines	ibeCCkdShowCommitments.jsp
Contract Checkout	STORE_CHKOU T_CONTRACT	Checkout	Contract checkout	ibeCCkdCntrct.jsp
Contract Process	STORE_CHKOU T_CONTRACT_ P	Checkout	Contract checkout process	ibeCCkpCntrct.jsp
Contract Change Display	STORE_CHKOU T_CONTRACT_ CHANGE	Checkout	Contract change	ibeCCkdCntrctChng.jsp
Contract Change Process	STORE_CHKOU T_CONTRACT_ CHANGE_P	Checkout	Contract change process	ibeCCkpCntrctChng.jsp
Change Contract	STORE_CHKOU T_CONTRACT_ CHANGE_SENT	Checkout	Contract change	ibeCCkdCntrctSent.jsp
Standard Contract	STORE_CHKOU T_CONTRACT_ STD	Checkout	Standard contract	None
Contract Text	STORE_CHKOU T_CONTRACT_ TEXT	Checkout	Contract text	ibeCCkdCntrctText.jsp
Header Display	STORE_CHKOU T_HEADER_ DIS PLAY	Checkout	Header display	ibeCCkdHdrDisplay.jsp

Name	Prog. Access Name	Category	Description	Source File
Invoice Header Display	STORE_CHKOU T_INVOICE_HE ADER	Checkout	Invoice header display	ibeCCKdHdrBillPay.jsp
Invoice Header Process	STORE_CHKOU T_INVOICE_HE ADER_P	Checkout	Invoice header process	ibeCCKpHdrBillPay.jsp
Create new address	STORE_CHKOU T_CREATE_AD DRESS	Checkout	Create new address	ibeCCKdCreateAddr.jsp
Process address creation	STORE_CHKOU T_CREATE_AD DRESS_P	Checkout	Process address creation	ibeCCKpCreateAddr.jsp
Create new contact	STORE_CHKOU T_CREATE_CO NTACT	Checkout	Create new contact	ibeCCKdCreateCntct.jsp
Process contact creation	STORE_CHKOU T_CREATE_CO NTACT_P	Checkout	Process contact creation	ibeCCKpCreateCntct.jsp
Create new customer	STORE_CHKOU T_CREATE_CUS TOMER	Checkout	Create new customer	ibeCCKdCreateCust.jsp
Process customer creation	STORE_CHKOU T_CREATE_CUS TOMER_P	Checkout	Process customer creation	ibeCCKpCreateCust.jsp
STORE_CHKOU T_LINE_BILL_D TLS	STORE_CHKOU T_LINE_BILL_D TLS	Checkout	Details Page for Line Billing	ibeCCKdLineBillDetails.jsp
STORE_CHKOU T_LINE_BILL_S UMM	STORE_CHKOU T_LINE_BILL_S UMM	Checkout	Summary Page for Line Billing	ibeCCKdLineBillSummary.jsp

Name	Prog. Access Name	Category	Description	Source File
Line level cart details	STORE_CHKOU T_LINE_SHIPBILL_DTLS	Checkout	Line level shipping & billing details.	ibeCCkdLineShipBillDtls.jsp
Line Shipments Details Page	STORE_CHKOU T_LINE_SHIP_DTLS	Checkout	Line Shipments Details Page	ibeCCkdLineShipDetails.jsp
Line Shipments Summary Page	STORE_CHKOU T_LINE_SHIP_SUMM	Checkout	Line Shipments Summary Page	ibeCCkdLineShipSummary.jsp
STORE_CHKOU T_LINE_SUMM	STORE_CHKOU T_LINE_SUMM	Checkout	Common include Page for displaying the lines for Shipping and Billing	ibeCCkdLineSummary.jsp
STORE_CHKOU T_PAYMENT_CHANGE	STORE_CHKOU T_PAYMENT_CHANGE	Checkout	Update payment information	ibeCCkdPmtChng.jsp
STORE_CHKOU T_PAYMENT_CHANGE_P	STORE_CHKOU T_PAYMENT_CHANGE_P	Checkout	Update payment information processing page	ibeCCkpPmtChng.jsp
Select customer for quote	STORE_CHKOU T_QUOTE_CUSTOMER	Checkout	Select customer for quote	ibeCCkdQuoteCustomer.jsp
Order Review	STORE_CHKOU T_REVIEW	Checkout	Order Review	ibeCCkdOrdReview.jsp
Order Review Process	STORE_CHKOU T_REVIEW_P	Checkout	Order Review process page	ibeCCkpOrdReview.jsp
Sales Help	STORE_CHKOU T_SALES_HELP	Checkout	Sales Help	ibeCCkdSalesHelp.jsp

Name	Prog. Access Name	Category	Description	Source File
Sale Help Process	STORE_CHKOUT_SALES_HELP_P	Checkout	Sale Help process page	ibeCCKpSalesHelp.jsp
Address search page	STORE_CHKOUT_SEARCH_ADDRESS	Checkout	Address search page	ibeCCKdSearchAddr.jsp
Contact search page	STORE_CHKOUT_SEARCH_CONTACT	Checkout	Contact search page	ibeCCKdSearchContact.jsp
Customer search page	STORE_CHKOUT_SEARCH_CUSTOMER	Checkout	Customer search page	ibeCCKdSearchCustomer.jsp
Shipment Methods	STORE_CHKOUT_SHIPMENT_METHODS	Checkout	Shipment Methods	ibeCCKdShipMethods.jsp
Ship Header Display	STORE_CHKOUT_SHIP_HEADER	Checkout	Ship Header Display	ibeCCKdHdrShip.jsp
Ship Header Process	STORE_CHKOUT_SHIP_HEADER_P	Checkout	Ship Header Process	ibeCCKpHdrShip.jsp
Order Summary	STORE_CHKOUT_SUMMARY	Checkout	Order summary page	ibeCCKdOrdSummary.jsp
Store Checkout Update Address	STORE_CHKOUT_UPDATE_ADDRESS	Checkout	Update address page	ibeCCKdUpdateAddr.jsp
Store Checkout Update Address Process	STORE_CHKOUT_UPDATE_ADDRESS_P	Checkout	Update address process page	ibeCCKpUpdateAddr.jsp
Address search results	STORE_CHKOUT_VIEW_ADDRESSES	Checkout	Address search results page	ibeCCKdViewAddr.jsp

Name	Prog. Access Name	Category	Description	Source File
Process address search	STORE_CHKOU T_VIEW_ADDR ESSES_P	Checkout	Address search results process page	ibeCCkpViewAddr.jsp
Contact search results page	STORE_CHKOU T_VIEW_CONTACTS	Checkout	Contact search results page	ibeCCkdViewCntct.jsp
Process contact search	STORE_CHKOU T_VIEW_CONTACTS_P	Checkout	Process contact search page	ibeCCkpViewCntct.jsp
Customer search results page	STORE_CHKOU T_VIEW_CUSTOMERS	Checkout	Customer search results page	ibeCCkdViewCust.jsp
Process customer search	STORE_CHKOU T_VIEW_CUSTOMERS_P	Checkout	Process customer search	ibeCCkpViewCust.jsp
Modify line level shipping details display page	STORE_CART_LINE_SPLIT_DETAILS	Checkout	Modify line level shipping details display page	ibeCCkdLineSplit.jsp
Modify line level shipping details process page	STORE_CART_LINE_SPLIT_DETAILS_P	Checkout	Modify line level shipping details process page	ibeCCkpLineSplit.jsp
Contact Search results list page	STORE_CHKOU T_SRCH_LIST_CONTACTS	Checkout	Contact Search results list page	ibeCCkdSrchListCntct.jsp
Address Search results list page	STORE_CHKOU T_SRCH_LIST_ADDRESSES	Checkout	Address Search results list page	ibeCCkdSrchListAddr.jsp

Express Checkout Display Templates

The following table lists seeded Display Templates for Express Checkout. See the "Implementing Carts and Orders" chapter for more information.

Express Checkout Display Templates

Name	Prog. Access Name	Category	Description	Source File
EXPRESS CHK OUT CANCEL	STORE_XPR_C ANCEL	Express Checkout	Cancel a express checkout order	ibeCXpdShowCa ncel.jsp
EXPRESS CHK OUT ERROR	STORE_XPR_ER ROR	Express Checkout	Error during express checkout	ibeCXpdShowEr ror.jsp
EXPRESS CHK OUT PROCESS	STORE_XPR_PR OCESS	Express Checkout	Processes the express checkout request	ibeCXppDoButto n.jsp
EXPRESS CHK OUT SETTINGS DISPLAY	STORE_XPR_SE TTINGS_DISPL AY	Express Checkout	Displays express checkout settings	ibeCXpdShowSe ttings.jsp
EXPRESS CHK OUT SETTINGS SAVE	STORE_XPR_SE TTINGS_SAVE	Express Checkout	Save express checkout settings	ibeCXppSaveSett ings.jsp
EXPRESS CHK OUT TAG AREA	STORE_XPR_TA G_AREA	Express Checkout	Displays the area around the checkout tag	ibeCXpdShowTa g.jsp
EXPRESS CHK OUT VIEW	STORE_XPR_VI EW	Express Checkout	View a express checkout order	ibeCXpdViewPe nding.jsp

Post Sales Display Templates

The following table, lists seeded Display Templates for postsales activity. See the chapter, Implementing Carts and Orders, page 13-1, for more information.

Post Sales Display Templates

Name	Prog. Access Name	Category	Description	Source File
Store Cancel Order	STORE_PSI_CANCEL_ORDER_P	Post Sales	Template for cancel order screen	ibeCOtdOrdCancelMain.jsp
Invoice Details Processing Page	STORE_PSI_INVOICE_DETAIL_P	Post Sales	Invoice details processing page	ibeCOtdInvDtIMain.jsp
Invoice payment details	STORE_PSI_INVOICE_PAYMENT_DETAIL_P	Post Sales	Invoice payment details	ibeCOtdInvPmtMain.jsp
Invoice Summary Processing Page	STORE_PSI_INVOICE_SUMMARY_P	Post Sales	Invoice summary processing page	ibeCOtdInvSummaryMain.jsp
Order Detail Processing Page	STORE_PSI_ORDER_DETAIL_P	Post Sales	Order details processing page	ibeCOtdOrdDtIMain.jsp
Walkin Order Search Display Page	STORE_PSI_WALKIN_ORDER_SRCH_D	Post Sales	Walkin order search display page	ibeCOtdWOrdSrch.jsp
Walkin Order Search Processing Page	STORE_PSI_WALKIN_ORDER_SRCH_P	Post Sales	Walkin order search processing page	ibeCOtpWOrdSrch.jsp
Shipping Details Custom Processing	STORE_SHIP_DETAIL_CUSTOM_P	Post Sales	Shipping details custom processing page	ibeCOtpShpDtICustom.jsp
Order Summary Processing Page	STORE_PSI_ORDER_SUMMARY_P	Post Sales	Order summary processing page	ibeCOtdOrdSummaryMain.jsp
Payment Details Processing Page	STORE_PSI_PAYMENT_DETAIL_P	Post Sales	Payment details processing page	ibeCOtdPmtDtIMain.jsp

Name	Prog. Access Name	Category	Description	Source File
Payment Summary Processing	STORE_PSI_PAYMENT_SUMMARY_P	Post Sales	Payment summary processing page	ibeCOtdPmtSummaryMain.jsp
Shipment Details Processing	STORE_PSI_SHIPMENT_DETAIL_P	Post Sales	Shipment details processing page	ibeCOtdShpDtlMain.jsp
Shipment Details for Shipment Number	STORE_PSI_DELIVERY_DETAIL_P	Post Sales	Shipment details for Shipment Number	ibeCOtdDlvyDtlMain.jsp
Order Details: Line Billing Details	STORE_PSI_LINE_BILLING_DTL_P	Post Sales	Order Details: Line Billing Details	ibeCOtdOrdLineBillDtlMain.jsp
Order Details: Line Shipping Details	STORE_PSI_LINE_SHIPPING_DTL_P	Post Sales	Order Details: Line Shipping Details	ibeCOtdOrdLineShipDtlMain.jsp

Install Base Templates

The following table lists seeded Display Templates for Oracle Install Base functionality in the Customer UI. See the chapter, *Implementing Carts and Orders*, page 13-1, for more information. Several bins are also seeded for Install Base pages; see the "Seeded Bin Display Templates" section within this appendix for more information.

Install Base Display Templates

Name	Prog. Access Name	Category	Description	Source File
B2C Instances	STORE_PSI_IB_B2C_INSTANCE_SUMMARY_D	Install Base	Display Page to display instances for a B2C User	ibeCIbdCInstances.jsp
Install Base : B2B Instances	STORE_PSI_IB_B2B_INSTANCE_SUMMARY_D	Install Base	Display Page to display instances for a B2B User	ibeCIbdBInstances.jsp

Name	Prog. Access Name	Category	Description	Source File
Install Base : Configuration Details	STORE_PSI_IB_ B2B_CONFIG_D ETAILETAIL_D	Install Base	Loads the configured item; calls common configuration display page to display the configurable item	ibeCIbdBViewC onfigDetail.jsp
Install Base : Instance Detail	STORE_PSI_IB_I NSTANCE_DET AIL_D	Install Base	Displays the instance details	ibeCIbdInstance Detail.jsp
Install Base : Main Page	STORE_PSI_IB_I NSTANCE_MAI N_D	Install Base	Includes the inner pages to display Instances/ Configuration Instances	ibeCIbdInstance Main.jsp
Install Base : Custom Attributes	STORE_PSI_IB_I NST_DTL_CUST OM_D	Install Base	This template allows the implementing company to display Install Base extended attributes. This template will be displayed in the item details templates.	Out-of-box, not mapped to any physical JSP file. To implement, include the display template file before the following code in ibeCIbdInstance Detail.jsp<% @include file=" ibeCZzdBottom. jsp" %> String _orddtlmain =

Returns Display Templates

The following table lists seeded Display Templates for Returns functionality in the Customer UI. See the chapter, *Implementing Carts and Orders*, page 13-1, for more information.

Returns Display Templates

Name	Prog. Access Name	Category	Description	Source File
Returns: Search & Select item (Multi Order Flow) Page	STORE_PSI_RET URN_CREATE_ MULTILINE_P	Returns	Returns: Search & Select item (Multi Order Flow) Page	ibeCOtdRetCre MultiLineMain. jsp
Returns: Select Items(Single Order Flow) Page	STORE_PSI_RET URN_CREATE_ SINGLELINE_P	Returns	Returns: Select Items(Single Order Flow) Page	ibeCOtdRetCreSi ngleLineMain. jsp
Returns: Confirmation Page	STORE_PSI_RET URN_CONFIRM _P	Returns	Returns: Confirmation Page	ibeCOtdRetConf irmMain.jsp
Returns: Review and Submit Page	STORE_PSI_RET URN_REVIEW_ P	Returns	Returns: Review and Submit Page	ibeCOtdRetRevi ewMain.jsp
Returns: Summary Page	STORE_PSI_RET URN_SUMMAR Y_P	Returns	Returns: Summary Page	ibeCOtdRetSum Main.jsp
Returns: Details Page	STORE_PSI_RET URN_DETAIL_P	Returns	Returns: Details Page	ibeCOtdRetDtlM ain.jsp
Returns: Billing Details Page For B2B customer	STORE_PSI_BIL L_DETAIL_P	Returns	Returns: Billing Details Page For B2B customer	ibeCOtdLineBill Main.jsp

Available to Promise Display Templates

The following table lists seeded Display Templates for Available to Promise (ATP) functionality in the Customer UI. See the "Providing Regular Available to Promise (ATP)" section in the chapter, *Implementing Products*, page 7-1, for more information.

Available to Promise Display Templates

Name	Prog. Access Name	Category	Description	Source File
ATP Component page for Customer	STORE_PSI_ATP_C	Shopping Cart	ATP Component page for Customer and Sales Rep	ibeCOtcAtp.jsp
ATP Display Page	STORE_PSI_ATP_D	Shopping Cart	ATP Display Page	ibeCOtdAtp.jsp
ATP Processing Page	STORE_PSI_ATP_P	Shopping Cart	ATP Processing Page	ibeCOtpAtp.jsp
ATP Container page for Sales Person	STORE_PSI_ATP_SP_D	Shopping Cart	ATP container page for sales person	ibeSOtdAtp.jsp

User Management Display Templates

The following table lists seeded Display Templates for User Management. See the chapter, Implementing User Management, page 14-1, for more information.

User Management Display Templates

Name	Prog. Access Name	Category	Description	Source File
Role Management Display	STORE_UM_ROLE_MGMT_SU MMARY_D	User Management	Container/Display page for Listing the available Roles	ibeCUmdRoleMgmt.jsp
Role Management Processing	STORE_UM_ROLE_MGMT_SU MMARY_P	User Management	Processing page for Listing the available Roles	ibeCUmpRoleMgmt.jsp

Name	Prog. Access Name	Category	Description	Source File
Roles Edit Display	STORE_UM_CREATE_UPDATE_ROLES_D	User Management	Container/Display page for Create/Update Roles	ibeCUmdRoleCrUpd.jsp
Roles Edit Processing	STORE_UM_CREATE_UPDATE_ROLES_P	User Management	Processing page for Create/Update Roles	ibeCUmpRoleCrUpd.jsp
Roles Delete Display	STORE_UM_REMOVE_ROLES_D	User Management	Container/Display page for Remove Roles	ibeCUmdRoleDelete.jsp
Contact Management Display	STORE_UM_CONTACT_SUMMARY_D	User Management	Store contact summary page	ibeCUmdContactSummary.jsp
Display Contact details page	STORE_UM_CONTACT_DETAILS_D	User Management	Display Contact details page	ibeCUmdContactDetails.jsp
Show Assigned Roles Display	STORE_UM_ROLE_SHOW_D	User Management	Show user roles display page	ibeCUmdShowUserRole.jsp
Show Assigned Roles Processing	STORE_UM_ROLE_SHOW_P	User Management	Show user roles processing page	ibeCUmpShowUserRole.jsp
Assign Roles Display	STORE_UM_ROLE_ASSIGN_D	User Management	Assign user roles display page	ibeCUmdAssignRole.jsp
Assign Roles Processing	STORE_UM_ROLE_ASSIGN_P	User Management	Assign user roles display page	ibeCUmpAssignRole.jsp
Assign Accounts Display	STORE_UM_ACCOUNT_ASSIGN_D	User Management	Assign accounts display page	ibeCUmdAssignAccount.jsp
Show Assigned Sites Display	STORE_UM_SITES_SHOW_D	User Management	User sites display page	ibeCUmdShowUserSites.jsp

Name	Prog. Access Name	Category	Description	Source File
Pending Approvals Summary Display	STORE_UM_PEN DING_APPRO VAL_SUMMAR Y_D	User Management	Container/Display page for Listing the Pending Approval Requests	ibeCUmdPApproval.jsp
Pending Approvals Summary Processing	STORE_UM_PEN DING_APPRO VAL_SUMMAR Y_P	User Management	Processing Page for Pending Approvals Listing Page	ibeCUmpPApproval.jsp
Approve/Reject Pending Approvals Display	STORE_UM_PEN DING_APPRO VAL_DETAILS_ D	User Management	Container/Display page for Approve/Reject Requests	ibeCUmdPAppDet.jsp
Approve/Reject Pending Approvals Processing	STORE_UM_PEN DING_APPRO VAL_DETAILS_ P	User Management	Container/Display page for Approve/Reject Requests	ibeCUmpPAppDet.jsp
Assign Sites Display	STORE_UM_SIT ES_ASSIGN_D	User Management	Assign user sites display page	ibeCUmdAssignSites.jsp
Assign Accounts Processing	STORE_UM_AC COUNT_ASSIG N_P	User Management	Assign user accounts processing page	ibeCUmpAssignAccount.jsp
Assign Accounts Display	STORE_UM_AC COUNT_SHOW _D	User Management	User accounts display page	ibeCUmdShowUserAccount.jsp
Remove account warning display	STORE_UM_RE M_CUSTACCT_ WARN_D	User Management	Remove account warning display page	ibeCUmdRemCustAcctWarn.jsp
Revoke account processing	STORE_UM_RE M_CUSTACCT_ WARN_P	User Management	Revoke account processing page	ibeCUmpRemCustAcctWarn.jsp

Name	Prog. Access Name	Category	Description	Source File
Container Page for Registration	STORE_REG_CONTAINER_D	Registration	Container page that calls other registration pages based on user type	ibeCRgdRegContainer.jsp
Registration Page for Usertypes	STORE_REG_REGISTER_D	Registration	Displays available user types	ibeCRgdRegister.jsp
Registration error page	STORE_REG_ERROR_D	Registration	Registration error page used to display error message in user registration process	ibeCRgdError.jsp
Displays user preferences during registration	PARTNER_REG_USER_PREFERENCES_INCL	Registration	Displays user preferences during registration	pvxCRgdUsrPrefIncl.jsp
Individual user creation display page	STORE_REG_B2C_CREATE_D	Registration	Individual user creation display page	ibeCRgdIndividualUser.jsp
Individual user creation processing page	STORE_REG_B2C_CREATE_P	Registration	Individual user creation processing page	ibeCRgpIndividualUser.jsp
Business user creation display page	STORE_REG_BUSINESS_CREATE_D	Registration	Business user registration page	ibeCRgdBusinessCreate.jsp
Primary user creation display page	STORE_REG_PRIMARY_CREATE_D	Registration	Primary business user registration page	ibeCRgdPrimaryCreate.jsp
Primary user creation processing page	STORE_REG_PRIMARY_CREATE_P	Registration	Primary user creation processing page	ibeCRgpPrimaryCreate.jsp

Name	Prog. Access Name	Category	Description	Source File
User information like First/Last name and email	STORE_REG_PERSON_INCL_D	Registration	User information like First/Last name and email	ibeCRgdPersonInfoIncl.jsp
Username and Password include page	STORE_REG_USER_PASSWORD_D	Registration	Username and Password include page	ibeCRgdUserPassword.jsp
Individual user partial creation display page	STORE_REG_B2_CREATE_PARTIAL_D	Registration	Individual user partial creation display page (Online Access to Existing Account)	ibeCRgdIndividualCreatePartial.jsp
Individual user partial creation processing page	STORE_REG_B2_CREATE_PARTIAL_P	Registration	Individual user partial creation processing page (Online Access to Existing Account)	ibeCRgpIndividualCreatePartial.jsp
Business user partial creation display page	STORE_REG_BUSINESS_CREATE_PARTIAL_D	Registration	Business user partial creation display page (Online Access to Existing Account)	ibeCRgdBusinessCreatePartial.jsp
Business user partial creation processing page	STORE_REG_BUSINESS_CREATE_PARTIAL_P	Registration	Business user partial creation processing page (Online Access to Existing Account)	ibeCRgpBusinessCreatePartial.jsp
Displays partner types during registration	PARTNER_REG_MEMBER_TYPES_D_INCL	Registration	Displays partner types during registration	pvxCRgdPartnerAddnlInfo.jsp
Partner business user creation display page	STORE_REG_BUSINESS_PARTNER_CREATE_D	Registration	Partner business user creation display page	ibeCRgdPartnerNonPriCreate.jsp

Name	Prog. Access Name	Category	Description	Source File
Partner business user creation processing page	STORE_REG_BU SPARTNER_CR EATE_P	Registration	Partner business user creation processing page	ibeCRgpPartnerNonPriCreate.jsp
Partner primary user creation display page	STORE_REG_PA RTNER_CREAT E_D	Registration	Partner primary user creation display page	ibeCRgdPartnerPriCreate.jsp
Partner primary user creation processing page	STORE_REG_PA RTNER_CREAT E_P	Registration	Partner primary user creation processing page	ibeCRgpPartnerPriCreate.jsp
Processing page for partner types during registration	PARTNER_REG _MEMBER_TYP ES_P	Registration	Processing page for partner types during registration	pvxCRgpPrtAddnlInfo.jsp
View Organization Details	STORE_ORG_A CC_INFO_D	Organization Profile	View Organization Details	ibeCOadOrgDetail.jsp
Update Organization Details	STORE_ORG_A CC_INFO_P	Organization Profile	Update Organization Details	ibeCOapOrgDetail.jsp
View Corporate Address Book	STORE_ORG_A CC_ADDR_BOOK_D	Organization Profile	View Corporate Address Book	ibeCOadOrgAddressBook.jsp
View Administrators of the company	STORE_ORG_A CC_ADMIN_D	Organization Profile	View Administrators of the company	ibeCOadAdministrators.jsp
Personal Information	STORE_CUST_A CC_HOME	User Profile	Personal Information display for user profile	ibeCAcdPersonalInfo.jsp
Login	STORE_CUST_A CC_LOGIN	User Profile	Login display page	ibeCAcdLogin.jsp

Name	Prog. Access Name	Category	Description	Source File
Account Authorization	STORE_CUST_A CC_LOGIN_AU TH	User Profile	Login authorization page	ibeCAcpLogin.jsp
Logout	STORE_CUST_A CC_LOGOUT	User Profile	Logout page	ibeCAcpLogout.jsp
Password Change	STORE_CUST_A CC_PASSWORD	User Profile	Password Change page	ibeCAcdPasswor d.jsp
Order preferences	STORE_CUST_A CC_PREFS	User Profile	Order preferences	ibeCAcdPreferen ces.jsp
Password Assistance	STORE_CUST_A CC_PWD_RESE T	User Profile	Login and Password Assistance page	ibeCAcdPwdAss ist.jsp
Password Assistance Processing	STORE_CUST_A CC_PWD_RESE T_P	User Profile	Login and Password Assistance processing page	ibeCAcpPwdAss ist.jsp
Payment Book processing	STORE_CUST_P MTBK_DISPLA Y	User Profile	Payment Book page	ibeCPmdPmtBoo k.jsp
Payment Book processing	STORE_CUST_P MTBK_SAVE	User Profile	Payment Book processing	ibeCPmpPmtBoo k.jsp
Payment Options Display	STORE_CUST_P MTBK_PAYME NT_OPTIONS	User Profile	Payment Options Display	ibeCPmdPmtOpt ions.jsp
Primary Account Setting	STORE_CUST_P RIM_ACCT	User Profile	Primary Account Setting	ibeCAcdPrimAc ct.jsp
Primary Account Setting Processing	STORE_CUST_P RIM_ACCT_P	User Profile	Primary Account Setting Processing	ibeCAcpPrimAc ct.jsp

Name	Prog. Access Name	Category	Description	Source File
Password Expired	STORE_CUST_ACC_PWD_EXPIRED	User Profile	Password Expired	ibeCAcdPwdExpired.jsp
Password Expired Processing	STORE_CUST_ACC_PWD_EXPIRED_P	User Profile	Password Expired Processing	ibeCAcpPwdExpired.jsp
Support Preferences	SUPPORT_CUST_ACC_ESUB	User Profile	User Profile: Support Preferences	ibuCSpdesubMain.jsp
Support Preferences Processing	SUPPORT_CUST_ACC_ESUB_P	User Profile	User Profile: Support Preferences Processing	ibuCSppesub.jsp
View User Profile Page	PARTNER_CUST_ACC_VIEW_ATTRIBUTES	User Profile	View user profile	pvxCAcdViewAttrMain.jsp
Update User Profile Page	PARTNER_CUST_ACC_EDIT_ATTRIBUTES	User Profile	Update user profile	pvxCAcdEditAttrMain.jsp
View Partner Profile	PARTNER_ORG_ACC_VIEW_ATTRIBUTES	User Profile	View Partner Profile	pvxCOadViewAttrMain.jsp
Update Partner Profile	PARTNER_ORG_ACC_EDIT_ATTRIBUTES	User Profile	Update Partner Profile	pvxCOadEditAttrMain.jsp
View Channel Team for Partner	PARTNER_ORG_ACC_CHANNEL_TEAM	User Profile	View Channel Team for Partner	pvxCOadChnlTeamMain.jsp
View Current Partner Memberships	PARTNER_ORG_ACC_MEMBERSHIPS	User Profile	View Current Partner Memberships	pvxCOadMmbrshipMain.jsp

Name	Prog. Access Name	Category	Description	Source File
Administration: View User Profile	PARTNER_UM_ VIEW_ATTRIBU TES	User Profile	User Administration: View User Profile	pvxCUmdView AttrMain.jsp
Administration: Update User Profile	PARTNER_UM_ EDIT_ATTRIBU TE	User Profile	User Administration: Update User Profile	pvxCUmdEditAt trMain.jsp
User Management: User Preferences	PARTNER_UM_ USER_PREFERE NCES_INCL	User Profile	Displays partner user preferences	pvxCUmdUsrPr efIncl.jsp
User/Organizati on Contact Information				
View Email Include	STORE_CP_VIE W_EMAIL_INC	Contact Point	View Email Include	ibeCCpdViewE mailIncl.jsp
Email Form	STORE_CP_EM AIL_FRM_INCL	Contact Point	Email Form	ibeCCpdEmailFo rm.jsp
Edit Email	STORE_CP_EDI T_EMAIL	Contact Point	Edit Email	ibeCCpdEditEm ail.jsp
Edit Email Processing Page	STORE_CP_EDI T_EMAIL_P	Contact Point		ibeCCppEditEm ail.jsp
Delete Email Processing Page	STORE_CP_DEL ETE_EMAIL_P	Contact Point	Delete Email Processing Page	ibeCCppDeleteE mail.jsp
View Organization Email	STORE_CP_VIE W_ORG_EMAIL	Contact Point	View Organization Email	ibeCCpdViewE mail.jsp
View User Phone	STORE_CP_VIE W_CUST_PHO NE	Contact Point	View User Phone	ibeCCpdViewPh one.jsp

Name	Prog. Access Name	Category	Description	Source File
View Organization Phone	STORE_CP_VIEW_ORG_PHONE	Contact Point	View Organization Phone	ibeCCpdViewPhone.jsp
View Phone Include	STORE_CP_VIEW_PHONE_INCLUDE	Contact Point	View Phone Include	ibeCCpdViewPhoneIncl.jsp
Phone Form Include	STORE_CP_PHONE_FORM_INCLUDE	Contact Point	Phone Form Include	ibeCCpdPhoneForm.jsp
Edit Phone	STORE_CP_EDIT_PHONE	Contact Point	Edit Phone	ibeCCpdEditPhone.jsp
Edit Phone Processing Page	STORE_CP_EDIT_PHONE_P	Contact Point	Edit Phone Processing Page	ibeCCppEditPhone.jsp
Delete Phone Processing Page	STORE_CP_DELETE_PHONE_P	Contact Point	Delete Phone Processing Page	ibeCCppDeletePhone.jsp
View Organization Telex	STORE_CP_VIEW_ORG_TELEX	Contact Point	View Organization Telex	ibeCCpdViewTelex.jsp
View Telex Include	STORE_CP_VIEW_TELEX_INCL	Contact Point	View Telex Include	ibeCCpdViewTelexIncl.jsp
Telex Form Include	STORE_CP_TELEX_FORM_INCL	Contact Point	Telex Form Include	ibeCCpdTelexForm.jsp
Edit Telex	STORE_CP_EDIT_TELEX	Contact Point	Edit Telex	ibeCCpdEditTelex.jsp
Edit Telex Processing Page	STORE_CP_EDIT_TELEX_P	Contact Point	Edit Telex Processing Page	ibeCCppEditTelex.jsp
Delete Telex Processing Page	STORE_CP_DELETE_TELEX_P	Contact Point	Delete Telex Processing Page	ibeCCppDeleteTelex.jsp

Name	Prog. Access Name	Category	Description	Source File
STORE_ADDRBK_BOOK	STORE_ADDRBK_BOOK	Address Book	Store Address Book	ibeCAddAddrBook.jsp
Store Address Create	STORE_ADDRBK_CREATE	Address Book	Store Address Create	ibeCADpAddrEdit.jsp
Store Address Delete	STORE_ADDRBK_DELETE	Address Book	Store Address Delete	ibeCADpAddrDelete.jsp
Store Address Display	STORE_ADDRBK_DISPLAY	Address Book	Store Address Display	ibeCAddAddrDisplay1.jsp
Store Address Display Alternate	STORE_ADDRBK_DISPLAY_ALTERNATE	Address Book	Store Address Display Alternate	ibeCAddAddrDisplay2.jsp
Store Address Display Alternate 2	STORE_ADDRBK_DISPLAY_ALTERNATE2	Address Book	Store Address Display Alternate 2	ibeCAddAddrDisplay3.jsp
Store Address Display Form	STORE_ADDRBK_DISPLAY_FORM	Address Book	Store Address Display Form	ibeCAddAddrEdit0.jsp
Store Address Edit	STORE_ADDRBK_EDIT	Address Book	Store Address Edit	ibeCAddAddrEdit.jsp
Store Address Default Form	STORE_ADDRBK_FRM_DEF	Address Book	Store Address Default Form	ibeCAddAddrFormDef.jsp
Store Address Flexible Address Form	STORE_ADDRBK_FRM_FLEX	Address Book	Store Address Flexible Address Form	ibeCAddAddrFormFlex.jsp
Store Address Select Create	STORE_ADDRBK_SEL_CREATE	Address Book	Store Address Select Create	ibeCAddAddrSelectCreate.jsp

Product Search Display Templates

The following table lists seeded Display Templates for Customer UI Product Search. This functionality is described in the chapter, Implementing Products, page 7-1.

Product Search Display Templates

Name	Prog. Access Name	Category	Description	Source File
Item Search Menu Display Page	STORE_SEARCH_MENU	Product Search	Item Search Menu Display Page	ibeCSrdSrchMenu.jsp
Advanced Search Form	STORE_SEARCH_REFINE	Product Search	Advanced Search Form	ibeCSrdSrchAdvForm.jsp
SEARCH RESULT	STORE_SEARCH_RESULT	Product Search	Shows search results	ibeCSrdSrchResults.jsp

Catalog Punchout Display Templates

The following table lists seeded Display Templates for Customer UI Supplier-Hosted Catalog Punchout. This functionality is described in the chapter, *Implementing the Catalog*, page 9-1.

Supplier-Hosted Catalog Punchout Display Templates

Name	Prog. Access Name	Category	Description	Source File
Punchout Login Page	STORE_PO_LOGIN_P		Punchout: Login page	ibeCPopLoginB.jsp
Punchout Logout	STORE_PO_LOGOUT_P		Punchout: Back to Procurement page	ibeCPopLogout.jsp
Punchout Page	STORE_PO_CHECKOUT_P		Punchout: Checkout page	ibeCPopPunchout.jsp

Other Display Templates

The following table lists other miscellaneous seeded Customer UI Display Templates.

Other Display Templates

Name	Prog. Access Name	Category	Description	Source File
About Us	STORE_SP_ABO UT_US	Others	About Us	None
Contact Us	STORE_SP_CON TACT_US	Others	Contact Us	None
Frequently Asked Question	STORE_SP_FAQ	Others	Frequently Asked Questions	None
Partner	STORE_SP_PAR TNER	Others	Partner	None
Return Warranty	STORE_SP_RET URN_WARRAN TY	Others	Return Warranty	None
Store Welcome	STORE_SP_WEL COME	Others	Store Welcome	None
JTF Style Sheet	JTF_STYLE_SHE ET	Others	Oracle CRM Technology Foundation Style Sheet	jtfucss.css
Store Style Sheet	STORE_STYLE_ SHEET	Others	Oracle iStore Cascading Style Sheet	jtfucss.css
Store Help Page	STORE_HELP_P AGE	Others	Help page	None
Live Help Bin Template	STORE_LIVE_H ELP_BIN	Others	Store Help Page	ibeCAcdLiveHel pBin.jsp
Live Help Error Page Template	STORE_LIVE_H ELP_ERR_PAGE	Others	Live Help Bin Template	ibeCLhdErrPage. jsp

Name	Prog. Access Name	Category	Description	Source File
Live Help PopUp Page Template	STORE_LIVE_HELP_POPUP	Others	Live Help Error Page Template	ibeCLhdPopUp.jsp
Live Help Process Page Template	STORE_LIVE_HELP_PROCESS	Others	Live Help PopUp Page Template	ibeCLhpProcess.jsp
Live Help Wait Page Template	STORE_LIVE_HELP_WAIT_PAGE	Others	Live Help Process Page Template	ibeCLhdWaitPage.jsp
Standard Trailer for all pages	STORE_CUSTOM_BOTTOM	Others	Live Help Wait Page Template	None
Store custom help	STORE_CUSTOM_HELP	Others	Store custom help	None
Content Callback Error Template	STORE_CONTENT_CALLBACK_ERROR	Others	Content Callback Error Template	None
Store Error Message Include Page	STORE_ERROR_MESSAGE_INCLUDE	Others	Store Error Message Include Page	ibeCZzdStatus.jsp
Handler for iStore events	STORE_EVENT_HANDLER	Others	Handler for iStore events	None
Table navigation page	STORE_COMMON_TABLE_NAVIGATOR	Others	Generic included display page for table navigation	ibeCZzdNavigator.jsp
Generic Message Page	STORE_GENERIC_MESSAGE	Others	Generic Message Page	ibeCZzdMsgBox.jsp
Store generic user fields	STORE_USER_INFORMATION_FORM	Others	Store common user information page	ibeCAcdRegistrationI.jsp

Name	Prog. Access Name	Category	Description	Source File
Descriptive FlexField Generic Display	STORE_DESC_F LEXFIELD_DISP	Others	Descriptive FlexField Generic Display	ibeCZzdDFlex.jsp
Descriptive FlexField Generic Processing	STORE_DESC_F LEXFIELD_P	Others	Descriptive FlexField Generic Processing	ibeCZzpDFlex.jsp

Oracle Configurator and BOM Integration Display Templates

The following table lists seeded Display Templates for the Oracle Configurator and Oracle Bills of Material (BOM) integration in the Customer UI.

Oracle Configurator and BOM Integration Display Templates

Name	Prog. Access Name	Category	Description	Source File
Branch or route upon return from Configurator	STORE_CFG_BR ANCH	Configurator	Main logic page to route the return to iStore from Configurator	ibeCFgpBranch.jsp
Display Configured item	STORE_CFG_DI SPLAY	Configurator	Display a Configured item in an HTML table cell	ibeCFgdDisplay.jsp
Set outer frame set to run Configurator	STORE_CFG_FR AME_SRCS	Configurator	Establishes the outer frame set for Configurator DHTML UI to run in.	ibeCFgdFrameSources.jsp

Name	Prog. Access Name	Category	Description	Source File
Starts the launching of the Configurator from iStore	STORE_CFG_LA UNCH	Configurator	Prepares parameters to launch the Configurator from iStore.	ibeCFgpLaunch.jsp
Return page for Configurator to post to	STORE_CFG_RE DIRECT	Configurator	Initial page for Configurator servlet to post to in returning to iStore and regaining iStore context.	ibeCFgpRedirect.jsp
Display Model Item Detail in Popup	STORE_CART_CFG_ITEMS_AC TUAL	Shopping Cart	Display Model Item Detail in Popup	ibeCScdMdllItemPopup.jsp
Display Model Item Lines	STORE_CART_MDL_ITEM_LINES	Shopping Cart	Display Model Item Lines	ibeCScdMdllItemLines.jsp
Display Model Item Detail	STORE_CART_MDL_ITEM_DETAIL	Shopping Cart	Display Model Item Detail	ibeCScdMdllItemDetail.jsp
Model Item Detail Processing Page	STORE_CART_MDL_ITEM_DETAIL_P	Shopping Cart	Model Item Detail Processing Page	ibeCScpMdllItemDetail.jsp

Oracle iSupport Integration Display Templates

The following table lists seeded Display Templates for Oracle iSupport integration. See the chapter, Integrating Oracle iStore with Oracle iSupport, page 25-1, for more information.

Oracle iSupport Integration Display Templates

Name	Prog. Access Name	Category	Description	Source File
Alerts Bin	SUPPORT_ALE RTS_BIN_IBEW C	Display Templates for section	Display alert messages to users	ibuCSpdAlertsBin.jsp
Ask Support Bin	SUPPORT_ASK_ SUPPORT_BIN_ IBEWC	Display Templates for section	Provide call agent functionality to get support	ibuCSpdCallMeBin.jsp
Search Solution Bin	SUPPORT_SEAR CH_SOLUTION _BIN_IBEWC	Display Templates for section	Search for a solution	ibuCSpdSolvePr obBin.jsp
Technical Library Bin	SUPPORT_TEC H_LIB_BIN_IBE WC	Display Templates for section	Publish documents to user from MES	ibuCSpdTechLibBin.jsp

Oracle Partner Management Integration Display Templates

The following table lists seeded Display Templates for Oracle Partner Relationship Management integration. See the chapter, *Integrating Oracle iStore with Oracle Partner Management*, page 27-1, for more information.

Oracle Partner Management Integration Display Templates

Name	Prog. Access Name	Category	Description	Source File
Enroll Programs Bin	PARTNER_ENR OLL_PRGMS_BI N_IBEWC	Display Templates for section	Display list of programs available for enrollment	pvxCPvdPrgmN ewBin.jsp
Enrollment Left 1 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_1	Display Templates for section	This bin is displayed at the top on the left hand side	None

Name	Prog. Access Name	Category	Description	Source File
Enrollment Left 2 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_2	Display Templates for section	This bin is displayed on the left hand side	None
Enrollment Left 3 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_3	Display Templates for section	This bin is displayed on the left hand side	None
Enrollment Left 4 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_4	Display Templates for section	This bin is displayed at the bottom on the left hand side	None
Enrollment Right 1 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_1	Display Templates for section	This bin is displayed at the top on the right hand side	None
Enrollment Right 2 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_2	Display Templates for section	This bin is displayed on the right hand side	None
Enrollment Right 3 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_3	Display Templates for section	This bin is displayed on the right hand side	None
Enrollment Right 4 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_4	Display Templates for section	This bin is displayed at the bottom on the right hand side	None
Manage My Partners Bin	PARTNER_MA NAGE_PARTNE RS_BIN_IBEWC	Display Templates for section	Allow VADs to manage partners	pvxCPvdMngPrt nrBin.jsp
New Offered Opportunities Bin	PARTNER_OFF ERED_OPTN_BI N_IBEWC	Display Templates for section	Display list of new offered opportunities to partners	pvxCPvdMyOffr dOppBin.jsp

Name	Prog. Access Name	Category	Description	Source File
Renew Programs Bin	PARTNER_RENEW_PRGMS_BIN_IBEWC	Display Templates for section	Display list of programs available for renewals	pvxCPvdPrgmRenewBin.jsp
Upgrade Programs Bin	PARTNER_UPGRADE_PRGMS_BIN_IBEWC	Display Templates for section	Display list of programs available for upgrade	pvxCPvdPrgmUpgradeBin.jsp
Program Overview Page	PARTNER_PRGM_OVERVIEW	Others	Displays the partner program overview page	pvxCPvpPrgmDescMain.jsp
Program Questionnaire Page	PARTNER_PRGM_QUESTIONNAIRE	Others	Displays the partner program questionnaire page	pvxCPvpEnrlQsnrMain.jsp
Program Questionnaire Summary Page	PARTNER_PRGM_QUESTIONNAIRE_SUMMARY	Others	Displays the partner program questionnaire summary page	pvxCPvpEnrlQsnrMryMain.jsp
Program Contract Page	PARTNER_PRGM_CONTRACT	Others	Displays the partner program contract page	pvxCPvpEnrlContractMain.jsp
Program Billing Information Page	PARTNER_PRGM_BILLING	Others	Displays the partner program billing information Page	pvxCPvpEnrlPBillingMain.jsp
Program Payment Inforamtion Page	PARTNER_PRGM_PAYMENT_INFO	Others	Displays the partner program payment information page	pvxCPvpEnrlPaymentInfoMain.jsp
Program Payment Confirmation Page	PARTNER_PRGM_PAYMENT_CONFIRM	Others	Displays the partner program payment confirmation page	pvxCPvpEnrlPaymentConfirmMain.jsp

Name	Prog. Access Name	Category	Description	Source File
Program Enrollment Confirmation Page	PARTNER_PRG M_ENRL_THA NKYOU	Others	Displays the partner program enrollment confirmation page	pvxCPvpEnrlThankMain.jsp
Partner Program Enrollment Common Layout	PARTNER_PRG M_ENRL_COM MON_LAYOUT	Others	Partner Program Enrollment Common Layout	pvxCPvdEnrlCmnDpMain.jsp
Program Overview Include	PARTNER_PRG M_ENRL_OVER VIEW_INCL	Others	Include page to display program overview	pvxCPvdPrgmDesclIncl.jsp
Program Questionnaire Include	PARTNER_PRG M_ENRL_QSNR _INCL	Others	Include page to display program questionnaire	pvxCPvdEnrlQsnrIncl.jsp
Program Questionnaire Summary Include	PARTNER_PRG M_ENRL_QSNR _SUMMARY_INCL	Others	Include page to display program questionnaire summary	pvxCPvdEnrlQsnrmyIncl.jsp
Program Contracts Include	PARTNER_PRG M_ENRL_CONT RACT_INCL	Others	Include page to display program contracts	pvxCPvdEnrlContractIncl.jsp
Program Payment Billing Information Include	PARTNER_PRG M_ENRL_PMNT _BILLING_INCL	Others	Include page to display billing information	pvxCPvdEnrlContractIncl.jsp
Program Payment Information Include	PARTNER_PRG M_ENRL_PMNT _INFO_INCL	Others	Include page to display program payment information	pvxCPvdEnrlPbillIncl.jsp
Program Payment Confirmation Include	PARTNER_PRG M_ENRL_PMNT _CONFIRM_INCL	Others	Include page to display program payment confirmation	pvxCPvdEnrlPbillfoIncl.jsp

Name	Prog. Access Name	Category	Description	Source File
Program Enrollment Confirmation Include	PARTNER_PRG M_ENRL_THA NKYOU_INCL	Others	Include page to display program enrollment confirmation	pvxCPvdEnrThankIncl.jsp
Enrollment Left 1 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_1	Others	This bin is displayed at the top on the left hand side	None
Enrollment Left 2 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_2	Others	This bin is displayed on the left hand side	None
Enrollment Left 3 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_3	Others	This bin is displayed on the left hand side	None
Enrollment Left 4 Bin	PARTNER_PRG M_ENRL_BIN_L EFT_4	Others	This bin is displayed at the bottom on the left hand side	None
Enrollment Center 1	PARTNER_PRG M_ENRL_CENT ER_1	Others	This bin is displayed at the top in the center of the page	None
Enrollment Center 2	PARTNER_PRG M_ENRL_CENT ER_2	Others	This bin is displayed in the center of the page	None
Enrollment Center 4	PARTNER_PRG M_ENRL_CENT ER_4	Others	This bin is displayed at the bottom in the center of the page	None
Enrollment Right 1 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_1	Others	This bin is displayed at the top on the right hand side	None

Name	Prog. Access Name	Category	Description	Source File
Enrollment Right 2 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_2	Others	This bin is displayed on the right hand side	None
Enrollment Right 3 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_3	Others	This bin is displayed on the right hand side	None
Enrollment Right 4 Bin	PARTNER_PRG M_ENRL_BIN_R IGHT_4	Others	This bin is displayed at the bottom on the right hand side	None
Partner Organization Additional Information Page	PARTNER_REG _MEMBER_TYP ES_D_INCL	Others	Used to capture additional Partner-related information; displays just after the Partner registration page is submitted; only shown for the <i>Register as a partner</i> user type	ibeCRgpPartner PriCreate.jsp

Oracle Quoting Integration Display Templates

The following table lists seeded Display Templates related to Customer UI Quotes. See the following chapters for more information on this functionality: Implementing Carts and Orders, page 13-1, and Integrating Oracle iStore with Oracle Quoting, page 28-1.

Oracle Quoting Integration Display Templates

Name	Prog. Access Name	Category	Description	Source File
SalesRep Add Item Process Page	STORE_QUOTE _ADD_ITEM	Others	SalesRep Add Item Process Page	ibeSQtpAddItem.jsp

Name	Prog. Access Name	Category	Description	Source File
Add services to a quote display page	STORE_QUOTE_ADD_SERVICE_S	Others	Add services to a quote display page	ibeSQtdAddServices.jsp
Add services to a quote component page	STORE_QUOTE_ADD_SERVICE_S_C	Others	Add services to a quote component page	ibeSQtcAddServices.jsp
Add services to a quote process page	STORE_QUOTE_ADD_SERVICE_S_P	Others	Add services to a quote process page	ibeSQtpAddServices.jsp
Advanced Search component page for quoting	STORE_QUOTE_ADV_SRCH_C	Others	Advanced Search component page for quoting	ibeSQtcAdvItemSrch.jsp
Advanced Search display page for quoting	STORE_QUOTE_ADV_SRCH_D	Others	Advanced Search display page for quoting	ibeSQtdAdvItemSrch.jsp
Append Quote Display Page	STORE_QUOTE_APPEND	Others	Append Quote Display Page	ibeSQtdAppend.jsp
Append Quote Component Page	STORE_QUOTE_APPEND_C	Others	Append Quote Component Page	ibeSQtcAppend.jsp
List More Versions for Appending Display Page	STORE_QUOTE_APPEND_MORE	Others	List More Versions for Appending Display Page	ibeSQtdApndMore.jsp
List More Versions for Appending Component Page	STORE_QUOTE_APPEND_MORE_C	Others	List More Versions for Appending Component Page	ibeSQtcApndMore.jsp
List More Versions for Appending Process Page	STORE_QUOTE_APPEND_MORE_P	Others	List More Versions for Appending Process Page	ibeSQtpApndMore.jsp

Name	Prog. Access Name	Category	Description	Source File
Append Quote Process Page	STORE_QUOTE_APPEND_P	Others	Append Quote Process Page	ibeSQtpAppend.jsp
Add services to a configuration display page	STORE_QUOTE_CFG_ADD_SVC	Others	Add services to a configuration display page	ibeSQtdCfgAddSvc.jsp
Add services to a configuration component page	STORE_QUOTE_CFG_ADD_SVC_C	Others	Add services to a configuration component page	ibeSQtcCfgAddSvc.jsp
Add services to a configuration process page	STORE_QUOTE_CFG_ADD_SVC_P	Others	Add services to a configuration process page	ibeSQtpCfgAddSvc.jsp
Copy Quote Display Page	STORE_QUOTE_COPY	Others	Copy Quote Display Page	ibeSQtdCopy.jsp
Copy Quote Component Page	STORE_QUOTE_COPY_C	Others	Copy Quote Component Page	ibeSQtcCopy.jsp
Copy Quote Options Display Page	STORE_QUOTE_COPY_OPT	Others	Copy Quote Options Display Page	ibeSQtdCopyOpt.jsp
Copy Quote Options Component Page	STORE_QUOTE_COPY_OPT_C	Others	Copy Quote Options Component Page	ibeSQtcCopyOpt.jsp
Copy Quote Process Page	STORE_QUOTE_COPY_P	Others	Copy Quote Process Page	ibeSQtpCopy.jsp
Create Quote Display Page	STORE_QUOTE_CREATE	Others	Create Quote Display Page	ibeSQtdCreate.jsp
Quote Create Attachments	STORE_QUOTE_CREATE_ATTACHMENT	Others	Quote Create Attachments	ibeSQtdCreateAttach.jsp
Quote Create Attachment Component Page	STORE_QUOTE_CREATE_ATTACHMENT_C	Others	Quote Create Attachment Component Page	ibeSQtcCreateAttach.jsp

Name	Prog. Access Name	Category	Description	Source File
Create Quote Process Page	STORE_QUOTE_CREATE_P	Others	Create Quote Process Page	ibeSQtpCreate.jsp
Enter Promotion Code Display Page	STORE_QUOTE_ENTER_PROM_O	Others	Enter Promotion Code Display Page	ibeSQtdEnterPromo.jsp
Enter Promotion Code Component Page	STORE_QUOTE_ENTER_PROM_O_C	Others	Enter Promotion Code Component Page	ibeSQtcEnterPromo.jsp
View Quote Header Details Display Page	STORE_QUOTE_HEADER	Others	View Quote Header Details Display Page	ibeSQtdHeader.jsp
Increase Quote Version Display Page	STORE_QUOTE_INC_VER	Others	Increase Quote Version Display Page	ibeSQtdIncVer.jsp
Increase Quote Version Component Page	STORE_QUOTE_INC_VER_C	Others	Increase Quote Version Component Page	ibeSQtcIncVer.jsp
View Quote Item Details Display Page	STORE_QUOTE_ITEMS	Others	View Quote Item Details Display Page	ibeSQtdItems.jsp
Quote Line Details Component Page	STORE_QUOTE_ITEMS_C	Others	Quote Line Details Component Page	ibeSQtcItems.jsp
View Quote Item Details Process Page	STORE_QUOTE_ITEMS_P	Others	View Quote Item Details Process Page	ibeSQtpItems.jsp
Quote Item Search Display Page	STORE_QUOTE_ITEM_SRCH	Others	Quote Item Search Display Page	ibeSQtdItemSrch.jsp
Quote Item Search Component Page	STORE_QUOTE_ITEM_SRCH_C	Others	Quote Item Search Component Page	ibeSQtcItemSrch.jsp

Name	Prog. Access Name	Category	Description	Source File
List Quotes Display Page	STORE_QUOTE_LIST	Others	List Quotes Display Page	ibeSQtdList.jsp
Quote List Agreements	STORE_QUOTE_LIST_AGRMNT	Others	Quote List Agreements	ibeSQtdListAgreement.jsp
Quote List Agreements Component Page	STORE_QUOTE_LIST_AGRMNT_C	Others	Quote List Agreements Component Page	ibeSQtcListAgreement.jsp
Quote List Attachments	STORE_QUOTE_LIST_ATTCH	Others	Quote List Attachments	ibeSQtdListAttach.jsp
Quote List Attachments Component Page	STORE_QUOTE_LIST_ATTCH_C	Others	Quote List Attachments Component Page	ibeSQtcListAttach.jsp
List Quotes Component Page	STORE_QUOTE_LIST_C	Others	List Quotes Component Page	ibeSQtcList.jsp
List More Versions Display Page	STORE_QUOTE_LIST_MORE	Others	List More Versions Display Page	ibeSQtdListMore.jsp
List More Versions Component Page	STORE_QUOTE_LIST_MORE_C	Others	List More Versions Component Page	ibeSQtcListMore.jsp
List More Versions Process Page	STORE_QUOTE_LIST_MORE_P	Others	List More Versions Process Page	ibeSQtpListMore.jsp
List Quotes Process Page	STORE_QUOTE_LIST_P	Others	List Quotes Process Page	ibeSQtpList.jsp
Quote Detail Main Display Page	STORE_QUOTE_MAIN	Others	Quote Detail Main Display Page	ibeSQtdMain.jsp

Name	Prog. Access Name	Category	Description	Source File
Quote Detail Main Component Page	STORE_QUOTE_MAIN_C	Others	Quote Detail Main Component Page	ibeSQtcMain.jsp
Quote Detail Main Process Page	STORE_QUOTE_MAIN_P	Others	Quote Detail Main Process Page	ibeSQtpMain.jsp
Quoting Submenu Display Page	STORE_QUOTE_MENU	Others	Quoting Submenu Display Page	ibeSQtdMenu.jsp
Quote header info for listMore display page	STORE_QUOTE_MORE_HEADER	Others	Quote header info for listMore display page	ibeSQtdMoreHdr.jsp
Search parameters for listMore display page	STORE_QUOTE_MORE_SRCH	Others	Search parameters for listMore display page	ibeSQtdMoreSrc.h.jsp
Quote Note Container Page	STORE_QUOTE_NOTES	Others	Quote Note Container Page	ibeSQtdNotes.jsp
Quote Detail Print Display Page	STORE_QUOTE_PRINT	Others	Quote Detail Print Display Page	ibeSQtdPrint.jsp
Quote Sales Credits Container Page	STORE_QUOTE_SALES_CREDITS_TS	Others	Quote Sales Credits Container Page	ibeSQtdSalesCredits.jsp
Quote Sales Credits Component Page	STORE_QUOTE_SALES_CREDITS_TS_C	Others	Quote Sales Credits Component Page	ibeSQtcSalesCredits.jsp
View Quote Shipment Display Page	STORE_QUOTE_SHIP_HEADER	Others	View Quote Shipment Display Page	ibeSQtdHdrShip.jsp

Name	Prog. Access Name	Category	Description	Source File
View Quote Shipment Process Page	STORE_QUOTE_SHIP_HEADER_P	Others	View Quote Shipment Process Page	ibeSQtpHdrShip.jsp
Sales Credits Table Display Page	STORE_QUOTE_SLS_CREDITS_TBL	Others	Sales Credits Table Display Page	ibeSQtdSlsCrTable.jsp
Sales Credits Table Processing Page	STORE_QUOTE_SLS_CREDITS_TBL_P	Others	Sales Credits Table Processing Page	ibeSQtpSlsCrTable.jsp
Enter Search Parameters Display Page	STORE_QUOTE_SRCH	Others	Enter Search Parameters Display Page	ibeSQtdSrch.jsp
Salesrep Search Page	STORE_QUOTE_SRP_SEARCH	Others	Salesrep Search Page	ibeSQtdSrpSearch.jsp
Salesrep Search Results Container Page	STORE_QUOTE_SRP_SEARCH_RSLTS	Others	Salesrep Search Results Container Page	ibeSQtdSrpSrchRslts.jsp
Salesrep Search Results Component Page	STORE_QUOTE_SRP_SEARCH_RSLTS_C	Others	Salesrep Search Results Component Page	ibeSQtcSrpSrchRslts.jsp
Salesrep Search Results Processing Page	STORE_QUOTE_SRP_SEARCH_RSLTS_P	Others	Salesrep Search Results Processing Page	ibeSQtpSrpSrchRslts.jsp
Quote Task Container Page	STORE_QUOTE_TASKS	Others	Quote Task Container Page	ibeSQtdTasks.jsp
Table of Quotes Display Page	STORE_QUOTE_TBL	Others	Table of Quotes Display Page	ibeSQtdTbl.jsp
View Quote Version History Display Page	STORE_QUOTE_VERSIONS	Others	View Quote Version History Display Page	ibeSQtdVersions.jsp

Name	Prog. Access Name	Category	Description	Source File
Quote Version History Component Page	STORE_QUOTE_VERSIONS_C	Others	Quote Version History Component Page	ibeSQtcVersions.jsp
View Quote Version History Process Page	STORE_QUOTE_VERSIONS_P	Others	View Quote Version History Process Page	ibeSQtpVersions.jsp
Table of Quote Versions Display Page	STORE_QUOTE_VER_TBL	Others	Table of Quote Versions Display Page	ibeSQtdVerTbl.jsp
Review Promotion Code Display Page	STORE_QUOTE_VIEW_PROMO	Others	Review Promotion Code Display Page	ibeSQtdViewPromo.jsp
Review Promotion Code Component Page	STORE_QUOTE_VIEW_PROMO_C	Others	Review Promotion Code Component Page	ibeSQtcViewPromo.jsp
STORE_CART_LIST_QUOTES	STORE_CART_LIST_QUOTES	Others	This is a container page to display Quotes listing	ibeCScdListQ.jsp
STORE_CART_LIST_QUOTES_P	STORE_CART_LIST_QUOTES_P	Others	Processing page for 'Quote Listing'	ibeCScpListQ.jsp

Non-Current Display Templates

The following table lists seeded Customer UI Display Templates from previous releases. These templates are not currently used, but are preserved for backward-compatibility purposes.

Non-Current Display Templates

Name	Prog. Access Name	Category	Description	Source File
Catalog Browse	STORE_CTLG_B ROWSE	Others	Catalog - Hierarchy Browse - 11.5.4 Maintenance Pack	ibecbrws.jsp
Catalog Buy Routing	STORE_CTLG_B UY_ROUTE	Others	Catalog - Buy Routing - 11.5.4 Maintenance Pack	ibecbrte.jsp
Catalog Display Routing	STORE_CTLG_ DISPLAY_ROUT E	Others	Catalog Display Routing - 11.5.4 Maintenance Pack	ibecdrt.jsp
Catalog Display Routing Included	STORE_CTLG_ DISPLAY_ROUT E_INCLUDED	Others	Catalog - display routing page included within another page - 11.5.4 Maintenance Pack	ibecdrti.jsp
Catalog Drill Down Leaf Section	STORE_CTLG_ DRILL_DOWN_ LEAF	Others	Catalog - drill down to the leaf sections - 11.5.4 Maintenance Pack	ibecddlf.jsp
Catalog Drill Down Leaf Section Included	STORE_CTLG_ DRILL_DOWN_ LEAF_INCLUD ED	Others	Catalog - drill down to the leaf sections included in another page - 11.5.4 Maintenance Pack	ibecdli.jsp

Name	Prog. Access Name	Category	Description	Source File
Catalog Featured Product	STORE_CTLG_FEATURED_ITEM	Others	Catalog - featured product - 11.5.5 Maintenance Pack	ibecfitm.jsp
Catalog Featured Section	STORE_CTLG_FEATURED_SECTION	Others	Catalog - featured section - 11.5.3 Maintenance Pack	ibecfsct.jsp
Catalog Featured Section Included	STORE_CTLG_FEATURED_SECTION_INCLUDED	Others	Catalog - featured section included within another page - 11.5.5 Maintenance Pack	ibecfsti.jsp
Catalog Product Detail	STORE_CTLG_ITEM_DETAIL	Others	Catalog - product detail - 11.5.4 Maintenance Pack	ibecitmd.jsp
Catalog Item Relationship	STORE_CTLG_ITEM_RELATIONSHIP	Others	Catalog - Item Relationship - 11.5.4 Maintenance Pack	ibecirel.jsp
Catalog Item Routing	STORE_CTLG_ITEM_ROUTE	Others	Catalog - Item Routing - 11.5.4 Maintenance Pack	ibecirte.jsp

Name	Prog. Access Name	Category	Description	Source File
Catalog Leaf Product Single	STORE_CTLG_L EAF_ITEM	Others	Catalog - leaf product allowing to add single product to the shopping cart - 11.5.4 Maintenance Pack	ibeclitm.jsp
Catalog Path	STORE_CTLG_P ATH	Others	Catalog - Path - 11.5.4 Maintenance Pack	ibecpath.jsp
Catalog Leaf Section Multiple	STORE_CTLG_L EAF_SECTION_ MULTIPLE	Others	Catalog - leaf section allowing to add multiple products to the shopping cart - 11.5.4 Maintenance Pack	ibeclfsm.jsp
Catalog Leaf Section Single	STORE_CTLG_L EAF_SECTION_ SINGLE	Others	Catalog - leaf section allowing to add single product to the shopping cart - 11.5.4 Maintenance Pack	ibeclfss.jsp
Catalog Leaf Section Multiple Included	STORE_CTLG_L EAF_SECT_MU LTIPLE_INCLU DED	Others	Catalog - leaf section allowing to add multiple products to the shopping cart included in another page - 11.5.5 Maintenance Pack	ibeclsmi.jsp

Name	Prog. Access Name	Category	Description	Source File
Catalog Leaf Section Single Included	STORE_CTLG_L EAF_SECT_SIN GLE_INCLUDE D	Others	Catalog - leaf section allowing to add single product to the shopping cart included in another page - 11.5.4 Maintenance Pack	ibec1ssi.jsp
SHOP LIST ADD ITEM	STORE_SHLIST_ ADD_ITEM	Others	Add items to a list - pre-R11.5.4	ibeslald.jsp
SHOP LIST ADD ITEM PROCESS	STORE_SHLIST_ ADD_ITEM_P	Others	Processes addition of items to list - pre-R11.5.4	ibeslalp.jsp
SHOP LIST DISPLAY	STORE_SHLIST_ DISPLAY	Others	Display shopping list - pre-R11.5.4	ibesldld.jsp
SHOP LISTS DISPLAY	STORE_SHLIST_ DISPLAY_LIST	Others	Displays shopping lists - pre-R11.5.4	ibesldlh.jsp
SHOP LIST PROCESS	STORE_SHLIST_ DISPLAY_LIST_ P	Others	Processes shopping lists - pre-R11.5.4	ibesldhp.jsp
SHOP LIST PROCESS	STORE_SHLIST_ DISPLAY_P	Others	Processes shopping list - pre-R11.5.4	ibesldlp.jsp
SHOP LIST ERROR	STORE_SHLIST_ ERROR	Others	Shows shopping list errors - pre-R11.5.4	ibeslwar.jsp
SHOP LIST SAVE	STORE_SHLIST_ SAVE	Others	Save a shopping list - pre-R11.5.4	ibeslcla.jsp

Name	Prog. Access Name	Category	Description	Source File
SHOP LIST SAVE PROCESS	STORE_SHLIST_ SAVE_P	Others	Process saving of shopping list - pre-R11.5.4	ibeslclp.jsp
POST SALES ADDRESS DISPLAY	STORE_PSI_AD DRESS_DISPLA Y	Others	Address display page - pre R11.5.4	ibeiaaddr.jsp
INVOICE DETAIL	STORE_PSI_INV OICE_DETAIL	Others	Invoice details - pre R11.5.4	ibeiinvd.jsp
INVOICE PAYMENT DETAIL	STORE_PSI_INV OICE_PAYMEN T_DETAIL	Others	Invoice payment details - pre R11.5.4	ibeiiivpd.jsp
INVOICE SUMMARY	STORE_PSI_INV OICE_SUMMAR Y	Others	Invoice summary - pre R11.5.4	ibeiinvh.jsp
SHOW ORDER DETAIL	STORE_PSI_OR DER_DETAIL	Others	Shows order detail - pre R11.5.4	ibeiodtl.jsp
SHOW SEARCH HEADERS	STORE_PSI_OR DER_SUMMAR Y	Others	Order search results page - pre R11.5.4	ibeiohdr.jsp
PAYMENT DETAIL	STORE_PSI_PA YMENT_DETAI L	Others	Payment details - pre R11.5.4	ibeipmtd.jsp
PAYMENT SUMMARY	STORE_PSI_PA YMENT_SUMM ARY	Others	Payment summary - pre R11.5.4	ibeipmth.jsp
SHIPMENT	STORE_PSI_SHI PMENT_DETAI L	Others	Shipment details - pre R11.5.4	ibeiship.jsp
POST SALES NAVIGATION BAR	STORE_PSI_SID E_NAVBAR	Others	Post sales navigation bar - pre R11.5.4	ibeiside.jsp

Name	Prog. Access Name	Category	Description	Source File
ATP HEADER	STORE_PSI_ATP_HEADER	Others	Display ATP headers - pre-R11.5.4	ibeiatph.jsp
ATP REDIRECT	STORE_PSI_ATP_REDIRECT	Others	ATP Redirect page - pre-R11.5.4	ibeiatpr.jsp
ATP RESULTS	STORE_PSI_ITEM_AVAILABILITY	Others	Item availability report - pre-R11.5.4	ibeicatp.jsp
CONFIGURATOR BRANCH	STORE_CONFIG_BRANCH	Others	Processes a configurator request - pre-R11.5.4	ibefbrch.jsp
CONFIGURED ITEM DISPLAY	STORE_CONFIG_DISPLAY	Others	Include page to display a configured item - pre-R11.5.4	ibefdisp.jsp
CONFIGURATOR FRAME	STORE_CONFIG_FRAME_SOURCES	Others	Provides frame specification to the configurator - pre-R11.5.4	ibeffrms.jsp
CONFIGURATOR LAUNCH	STORE_CONFIG_LAUNCH	Others	Launches the configurator - pre-R11.5.4	ibefcnfg.jsp
CONFIGURATOR REDIRECT	STORE_CONFIG_REDIRECT	Others	Redirects request to the configurator - pre-R11.5.4	ibefredr.jsp
EXPRESS CHECK OUT CANCEL	STORE_ORDER_XPR_CANCEL	Others	Cancel a express check out order - pre-R11.5.4	ibeo1ccl.jsp

Name	Prog. Access Name	Category	Description	Source File
EXPRESS CHK OUT ERROR	STORE_ORDER_XPR_ERROR	Others	Error during express chk out - pre-R11.5.4	ibeo1err.jsp
EXPRESS CHK OUT PROCESS	STORE_ORDER_XPR_PROCESS	Others	Processes the express chk out request - pre-R11.5.4	ibeo1dob.jsp
EXPRESS CHK OUT SETTINGS DISPLAY	STORE_ORDER_XPR_SETTING_S_DISPLAY	Others	Displays express chk out settings - pre-R11.5.4	ibeo1set.jsp
EXPRESS CHK OUT SETTINGS SAVE	STORE_ORDER_XPR_SETTING_S_SAVE	Others	Save express chk out settings - pre-R11.5.4	ibeo1sav.jsp
EXPRESS CHK OUT TAG AREA	STORE_ORDER_XPR_TAG_AREA	Others	Displays the area around the chk out tag - pre-R11.5.4	ibeo1tag.jsp
EXPRESS CHK OUT VIEW	STORE_ORDER_XPR_VIEW	Others	View a express chk out order - pre-R11.5.4	ibeo1vew.jsp
Account Select Display	STORE_CUST_A_CC_SELECT	Others	Account Select Display - not used post R11.5.9	ibeCAcdChooseAcct.jsp
Account Select Processing	STORE_CUST_A_CC_SELECTED	Others	Account Select Processing - not used post R11.5.9	ibeCAcpChooseAcct.jsp
My account menu	STORE_CUST_A_CC_SUBMENU	Others	My account menu - not used post R11.5.9	ibeCAcdMenu.jsp

Name	Prog. Access Name	Category	Description	Source File
User profile	STORE_CUST_PROFILE	Others	User profile - not used post R11.5.9	ibeCAcpProfile.jsp
USER ACCOUNT LOGIN	STORE_USR_AC C_LOGIN	Others	User account login - pre-R11.5.4	ibealgn1.jsp
USER ACCOUNT AUTHENTICATION	STORE_USR_AC C_LOGIN_AUT H	Others	User account authentication - pre-R11.5.4	ibealgn2.jsp
USER ACCOUNT CREATION	STORE_USR_AC C_CREATE	Others	User account creation - pre-R11.5.4	ibebcrac.jsp
USER ACCOUNT EDIT	STORE_USR_AC C_EDIT	Others	User account edit - pre-R11.5.4	ibeamoac.jsp
USER ACCOUNT HOME	STORE_USR_AC C_HOME	Others	User account home - pre-R11.5.4	ibeahome.jsp
USER ACCOUNT LOGOUT	STORE_USR_AC C_LOGOUT	Others	User account logout - pre-R11.5.4	ibealgot.jsp
User Password	STORE_USR_AC C_PASSWORD	Others	User Password - pre-R11.5.4	ibeapwd.jsp
USER ACCOUNT SELECTION	STORE_USR_AC C_SELECT	Others	User account selection - pre-R11.5.4	ibealgn3.jsp
USER ACCOUNT SELECTED	STORE_USR_AC C_SELECTED	Others	User account selected - pre-R11.5.4	ibealgn4.jsp

Name	Prog. Access Name	Category	Description	Source File
USER ACCOUNT SUBMENU	STORE_USR_AC C_SUBMENU	Others	User account submenu - pre-R11.5.4	ibeamenu.jsp
User Welcome Bin	STORE_USR_AC C_WELCOME	Others	User welcome bin - pre-R11.5.4	ibeawlcm.jsp
USER CREATION	STORE_USR_CR EATE	Others	User creation - pre-R11.5.4	ibebcrus.jsp
USER EDIT	STORE_USR_ED IT	Others	User edit - pre-R11.5.4	ibebmous.jsp
Store User Signin	STORE_USR_SI GNIN	Others	Store User Signin - pre-R11.5.4	ibeasgmn.jsp
SHOPPING CART ADD ITEM	STORE_SCART_ ADD_ITEM	Others	Add Item to Cart Page - pre-R11.5.4	ibescalh.jsp
SHOPPING CART ADD ONE ITEM	STORE_SCART_ ADD_ONE_ITE M	Others	Add Item to Cart Page for one item - pre-R11.5.4	ibescabh.jsp
SHOPPING CART BLURB	STORE_SCART_ BLURB	Others	Shopping cart blurb - pre-R11.5.4	ibesciah.jsp
SHOP CART DIRECT ENTRY	STORE_SCART_ DIRECT_ENTRY	Others	Enter customers inv items to cart - direct entry - pre-R11.5.4	ibescedh.jsp
SHOP CART DIRECT ENTRY PROCESS	STORE_SCART_ DIRECT_ENTRY _P	Others	Processes direct entries - pre-R11.5.4	ibescedp.jsp
SHOPPING CART GET SHAREE	STORE_SCART_ GET_SHAREE	Others	Retrieve sharee shopping cart - pre-R11.5.4	ibescrsh.jsp

Name	Prog. Access Name	Category	Description	Source File
SHOPPING CART GET SHAREE PROCESS	STORE_SCART_ GET_SHAREE_P	Others	Retrieve sharee shopping cart process page - pre-R11.5.4	ibescsr.jsp
SHOPPING CART LIST1	STORE_SCART_ LIST1	Others	Convert Cart to List 1 - pre-R11.5.4	ibesccar.jsp
SHOPPING CART LIST1 ROUTE	STORE_SCART_ LIST1_P	Others	Convert Cart to List 1 Process Page - pre-R11.5.4	ibesccbr.jsp
SHOPPING CART LIST2	STORE_SCART_ LIST2	Others	Convert Cart to List 2 - pre-R11.5.4	ibesccla.jsp
SHOPPING CART LIST2 PROCESS	STORE_SCART_ LIST2_P	Others	Convert cart to list 2 process page - pre-R11.5.4	ibescclb.jsp
SHOPPING CART MODIFY	STORE_SCART_ MODIFY	Others	Modify shopping cart - pre-R11.5.4	ibescdch.jsp
SHOPPING CART MODIFY PROCESS	STORE_SCART_ MODIFY_P	Others	Modify shopping cart process page - pre-R11.5.4	ibescdcr.jsp
SHOPPING CART SAVE	STORE_SCART_ SAVE	Others	Save shopping cart - pre-R11.5.4	ibescsch.jsp
SHOPPING CART SAVE PROCESS	STORE_SCART_ SAVE_P	Others	Save shopping cart process page - pre-R11.5.4	ibesccsr.jsp
SHOPPING CART SAVE ACTIVE CART	STORE_SCART_ SAVE_ACTIVE_ CART	Others	Saves active cart - pre-R11.5.4	ibescsap.jsp

Name	Prog. Access Name	Category	Description	Source File
SHOP CART SAVE ACTIVE CART PROCESS	STORE_SCART_ SAVE_ACTIVE_ CART_P	Others	Save active cart process page - pre-R11.5.4	ibescsar.jsp
SHOPPING CART SAVE SHAREE	STORE_SCART_ SAVE_SHAREE	Others	Save sharee shopping cart - pre-R11.5.4	ibescssh.jsp
SHOPPING CART SAVE SHAREE PROCESS	STORE_SCART_ SAVE_SHAREE_ P	Others	Save sharee shopping cart process page - pre-R11.5.4	ibescssr.jsp
SHOPPING CART SHARE MERCHANT	STORE_SCART_ SHARE_MERC HANT	Others	Share cart with merchant - pre- R11.5.4	ibescsmh.jsp
SHOPPING CART SHARE MERCHANT PROCESS	STORE_SCART_ SHARE_MERC HANT_P	Others	Share cart with merchant process page - pre-R11.5.4	ibescsmr.jsp
SHOPPING CART VIEW	STORE_SCART_ VIEW	Others	View shopping cart - pre-R11.5.4	ibescvch.jsp
SHOPPING CART VIEW PROCESS	STORE_SCART_ VIEW_P	Others	View shopping cart process page - pre-R11.5.4	ibescvcr.jsp
SHOPPING CART VIEW DISCOUNT	STORE_SCART_ VIEW_DISCOU NT	Others	View shopping cart discount - pre-R11.5.4	ibescpch.jsp
SHOPPING CART LISTS VIEW	STORE_SCART_ VIEW_LIST	Others	View shopping cart lists - pre- R11.5.4	ibescdlh.jsp
SHOPPING CART LISTS VIEW PROCESS	STORE_SCART_ VIEW_LIST_P	Others	View shopping cart lists process page - pre-R11. 5.4	ibescdlr.jsp

Name	Prog. Access Name	Category	Description	Source File
SHOPPING CART WARN 1	STORE_SCART_ WARN1	Others	Shopping cart warning page - pre-R11.5.4	ibescwha.jsp
SHOPPING CART WARN 2	STORE_SCART_ WARN2	Others	Shopping cart warning page - pre-R11.5.4	ibescwhb.jsp
REGISTER USER	STORE_REGIST ER_USER	Others	Register new user - pre-R11. 5.4	ibescuih.jsp
User Account Management	STORE_USR_M GMT_ACC_W	Others	User Account Management - not used post R11.5.9	ibeCUmpAcctW rap.jsp
Add User Account	STORE_USR_M GMT_ADD_AC C_W	Others	Add User Account - not used post R11. 5.9	ibeCUmpAddAc ctWrap.jsp
Permission Management	STORE_USR_M GMT_PERM_W	Others	Permission Management - not used post R11.5.9	ibeCUmpPermW rap.jsp
Role Management	STORE_USR_M GMT_ROLE_W	Others	Role Management - not used post R11.5.9	ibeCUmpRoleW rap.jsp
User Management	STORE_USR_M GMT_USER_W	Others	User Management - not used post R11.5.9	ibeCUmpUserW rap.jsp
Role Delete	STORE_USR_RO LE_DELETE	Others	Role Delete - not used post R11. 5.9	ibeCUmdRoleDe lCfm.jsp

Name	Prog. Access Name	Category	Description	Source File
Role processing	STORE_USR_ROLE_PROCESS	Others	Role processing - not used post R11.5.9	ibeCUmpRole.jsp
Role creation	STORE_USR_ROLE_CREATE	Others	Role creation - not used post R11.5.9	ibeCUmdRoleCreate.jsp
Business User registration display	STORE_CUST_BUSINESS_REGISTRATION	Others	Business User registration display - not used post R11.5.9	ibeCAcdBizUserReg.jsp
Registration processing	STORE_CUST_REGISTRATION	Others	Registration processing - not used post R11.5.9	ibeCAcpRegistration.jsp
End User registration display	STORE_CUST_SIGNIN	Others	End User registration display - not used post R11.5.9	ibeCAcdEndUserReg.jsp
User Account Management	STORE_USR_ADMIN_ACC	Others	User Account Management - pre-R11.5.4	ibebusac.jsp
User Account Management	STORE_USR_ADMIN_ACC_W	Others	User Account Management - pre-R11.5.4	ibebwusa.jsp
Add User Account	STORE_USR_ADMIN_ADD_ACCOUNT	Others	Add User Account - pre-R11.5.4	ibebadac.jsp
Add User Account	STORE_USR_ADMIN_ADD_ACCOUNT_W	Others	Add User Account - pre-R11.5.4	ibebwada.jsp

Name	Prog. Access Name	Category	Description	Source File
Permission Management	STORE_USR_A DMIN_PERM	Others	Permission Management - pre-R11.5.4	ibebperm.jsp
Permission Management	STORE_USR_A DMIN_PERM_W	Others	Permission Management - pre-R11.5.4	ibebwprm.jsp
Role Management	STORE_USR_A DMIN_ROLE	Others	Role Management - pre-R11.5.4	ibebrole.jsp
Role Management	STORE_USR_A DMIN_ROLE_W	Others	Role Management - pre-R11.5.4	ibebwrol.jsp
User Management	STORE_USR_A DMIN_USER	Others	User Management - pre-R11.5.4	ibebuser.jsp
User Management	STORE_USR_A DMIN_USER_W	Others	User Management - pre-R11.5.4	ibebwusr.jsp
USER CREDIT CARD CREATION	STORE_USR_CC _CREATE	Others	User credit card creation - pre-R11.5.4	ibeaccr.jsp
USER CREDIT CARD DELETION	STORE_USR_CC _DELETE	Others	User credit card deletion - pre-R11.5.4	ibeaccdl.jsp
USER CREDIT CARD DISPLAY	STORE_USR_CC _DISPLAY	Others	User credit card display - pre-R11.5.4	ibeaccv1.jsp
USER CREDIT CARD EDIT	STORE_USR_CC _EDIT	Others	User credit card edit - pre-R11.5.4	ibeacced.jsp
USER CREDIT CARD EXPIRATION	STORE_USR_CC _EXPIRATION	Others	User credit card expiration - pre-R11.5.4	ibeaccex.jsp

Name	Prog. Access Name	Category	Description	Source File
USER CREDIT CARD PRIMARY	STORE_USR_CC_PRIMARY	Others	User credit card primary - pre-R11.5.4	ibeaccpr.jsp
USER PAYMENT BOOKS DISPLAY	STORE_USR_PMTBK_DISPLAY	Others	Displays an user payment books - pre-R11.5.4	ibeapmtb.jsp
USER PAYMENT BOOKS SAVE	STORE_USR_PMTBK_SAVE	Others	Saves an user payment books - pre-R11.5.4	ibeapbsv.jsp
ADDRESS BOOK	STORE_ADDR_BOOK	Others	Shows address book entries - pre-R11.5.4	ibeaadbk.jsp
ADDRESS CREATE	STORE_ADDR_CREATE	Others	Create address book entry - pre-R11.5.4	ibeaadcr.jsp
ADDRESS DELETE	STORE_ADDR_DELETE	Others	Deletes an address book entry - pre-R11.5.4	ibeaadl.jsp
ADDRESS DISPLAY	STORE_ADDR_DISPLAY	Others	Displays the address book - pre-R11.5.4	ibeaadv1.jsp
ADDRESS DISPLAY ALTERNATIVE	STORE_ADDR_DISPLAY_ALT	Others	Displays the address book - pre-R11.5.4	ibeaadv2.jsp
ADDRESS EDIT	STORE_ADDR_EDIT	Others	Edit an address book entry - pre-R11.5.4	ibeaaed.jsp
ADDRESS PRIMARY	STORE_ADDR_PRIMARY	Others	Displays the primary address of the customer - pre-R11.5.4	ibeaadpr.jsp

Name	Prog. Access Name	Category	Description	Source File
ADDRESS SELECT	STORE_ADDR_SELECT	Others	Select a particular address - pre-R11.5.4	ibeaaads1.jsp
SEARCH REFINER	STORE_SRCH_REFINE	Others	Refine search criteria - 11.5.4 Maintenance Pack	ibeckskrf.jsp
SEARCH RESULT	STORE_SRCH_RESULT	Others	Shows search results - 11.5.4 Maintenance Pack	ibeckskr3.jsp
Store Help	STORE_HELP		Store Help - 11.5.5 Maintenance Pack	ibeahelp.jsp
Store Home	STORE_HOME		Store home page - 11.5.4 Maintenance Pack	ibezhome.jsp
Enter Promotion Code	STORE_CART_ENTER_PROMO	Shopping Cart	Enter Promotion Code page	ibeCScdEnterPromo.jsp
Enter Promotion Code	STORE_CART_ENTER_PROMO_P	Shopping Cart	Enter Promotion Code process page	ibeCScpEnterPromo.jsp
Table of Ready Promotion Code Display Page	STORE_CART_PROMO_ROTBL	Shopping Cart	Table of Ready Promotion Code Display Page	ibeCScdPromoROTbl.jsp
Table of Promotion Code Display Page	STORE_CART_PROMO_TBL	Shopping Cart	Table of Promotion Code Display Page	ibeCScdPromoTbl.jsp

Name	Prog. Access Name	Category	Description	Source File
View Promotion Code	STORE_CART_VIEW_PROMO	Shopping Cart	View promotion code page	ibeCScdViewPromo.jsp
View Promotion Code	STORE_CART_VIEW_PROMO_P	Shopping Cart	View promotion process code page	ibeCScpViewPromo.jsp

Media Objects

The following table lists seeded media objects. Source files are stored in the OA_MEDIA directory.

For a list of the language image media objects, see the section, "Language Images", in the chapter, Implementing Initial Customer Application Pages, page 6-1.

For a list of messages which also are seeded as media objects, see the section, "Using Media Objects to Present Message Text" in the chapter, Implementing Content, page 10-1.

For a list of content components, see the section, "Seeded Content Components" in the chapter, Implementing Content, page 10-1.

Media Objects

Name	Programmatic Access Name	Source File	Usage Suggestion
Store section small image	STORE_CTLG_SECTION_SMALL_IMAGE	None	Use to display section small images
Store item small image	STORE_CTLG_PRODUCT_SMALL_IMAGE	None	Use to display product small images
Store item large image	STORE_CTLG_PRODUCT_LARGE_IMAGE	None	Use to display product large images
Calalogue Item Dropdown Image	STORE_CTLG_ITEM_DROP_DOWN_IMAGE	None	Use to display product drop-down images

Name	Programmatic Access Name	Source File	Usage Suggestion
Catalogue Section Link image	STORE_CTLG_SCT_LINK_IMAGE	None	Use to display product images in multiple select templates
Tab Deselected Close Image	STORE_TAB_DESEL_CLOSE	ibeEOStltr5_default.gif	Use to display right corner of deselected tab in menu bar
My Account	STORE_TAB_LINK_ACCT	ibeTabLinkAcct.gif	Profile button at top right of screen
Shopping Cart	STORE_TAB_LINK_CART	ibeTabLinkCart.gif	Cart button at top right of screen
Help	STORE_TAB_LINK_HELP	ibeTabLinkHelp.gif	Help button at top right of screen
Order Tracker	STORE_TAB_LINK_ORDER	ibeTabLinkOrder.gif	Order button at top right of screen
Store Logo	STORE_TAB_LOGO	None	Logo displayed at the top left of the catalog pages
Store Logo	STORE_LOGO	None	
Store Main Logo	STORE_LOGO_MAIN	ibeTabLogo.gif	Logo that displays at the top left of the Site Selection Page
Specialty Site Logo Image	STORE_LOGO_SPECIALTY	None	The small images displayed in front of the specialty sites in site selection page
Tab Selected Close Image	STORE_TAB_SEL_CLOSE	ibeEOStltr6_default.gif	Use to display right corner of selected tab in menu bar
Bin Open Image	STORE_BIN_OPEN_IMAGE	ibeEOSutl02_default.gif	Use to display left corner of bin

Name	Programmatic Access Name	Source File	Usage Suggestion
Bin Close Image	STORE_BIN_CLOSE_IMAGE	ibeEOSutr02_default.gif	Use to display right corner of bin
Selected Cart Image	STORE_SEL_CART_IMAGE	ibeTabLinkCartS.gif	Use to display the selected cart icon
Deselected Cart Image	STORE_DESEL_CART_IMAGE	ibeTabLinkCart.gif	Use to display the deselected cart icon
Selected Account Image	STORE_SEL_ACCOUNT_IMAGE	ibeEOSuspr1_default.gif	Use to display the selected account icon
Deselected Account Image	STORE_DESEL_ACCOUNT_IMAGE	ibeEOSuspr0_default.gif	Use to display the deselected account icon
Selected Order Image	STORE_SEL_ORDER_IMAGE	ibeTabLinkOrderS.gif	Use to display the selected order icon
Deselected Order Image	STORE_DESEL_ORDER_IMAGE	ibeTabLinkOrder.gif	Use to display the deselected order icon
Selected Help Image	STORE_SEL_HELP_IMAGE	ibeTabLinkHelpS.gif	Use to display the selected help icon
Deselected Help Image	STORE_DESEL_HELP_IMAGE	ibeTabLinkHelp.gif	Use to display the deselected help icon
Transparent Image	STORE_TRANSPARENT_IMAGE	ibeEOSutrpx_default.gif	
Subtab Top Image	STORE_SUBTAB_TOP	ibeEOSunvbf_default.gif	Use to display the top image of subtab bar
Subtab Separator Image	STORE_SUBTAB_SEPARATOR	ibeEOSussepr_default.gif	Use to display the image of subtab separator
Tab Deselected Open Image	STORE_TAB_DESEL_OPEN	ibeEOSltr0_default.gif	Use to display left corner of deselected tab in menu bar

Name	Programmatic Access Name	Source File	Usage Suggestion
Tab Selected Open Image	STORE_TAB_SEL_OPEN	ibeEOStltr1_default.gif	Use to display left corner of selected tab in menu bar
Tab Deselected Close Selected Open Image	STORE_TAB_DESEL_CLOSE_DESEL_OPEN	ibeEOStltr2_default.gif	Use to display the image between two deselected tabs in menu bar
Tab Deselected Close Selected Open Image	STORE_TAB_DESEL_CLOSE_SEL_OPEN	ibeEOStltr3_default.gif	Use to display the image between a deselected tab and a selected tab in menu bar
Tab Selected Close Deselected Open Image	STORE_TAB_SEL_CLOSE_DESEL_OPEN	ibeEOStltr4_default.gif	Use to display the image between a selected tab and a deselected tab in menu bar
Tab Bottom Image	STORE_TAB_BOTTOM	ibeEOSsltr1_default.gif	Use to display the bottom of tab in menu bar
Subtab Curve Top Image	STORE_SUBTAB_CURVE_TOP	ibeEOSsltr2_default.gif	Use to display the image of curve top in subtab bar
Subtab Curve Bottom Image	STORE_SUBTAB_CURVE_BOTTOM	ibeEOSsltr3_default.gif	Use to display the image of curve bottom in subtab bar
Menu Right Edge Top Image	STORE_MENU_RIGHT_EDGE_TOP	ibeEOSsltr4_default.gif	Use to display the image of right edge of menu bar
Subtab Bottom Image	STORE_SUBTAB_BOTTOM	ibeEOSsltr5_default.gif	Use to display the bottom of subtab in subtab bar

Name	Programmatic Access Name	Source File	Usage Suggestion
Menu Left Edge Image	STORE_MENU_LEFT_EDGE	ibeEOSsltr6_default.gif	Use to display the left edge of menu bar
Menu Right Edge Bottom Image	STORE_MENU_RIGHT_EDGE_BOTTOM	ibeEOSsltr7_default.gif	Use to display the bottom of right edge of menu bar
Sign In Image	STORE_SIGN_IN_IMAGE	ibeEOSusin_default.gif	Use to display the sign in icon
Sign Out Image	STORE_SIGN_OUT_IMAGE	ibeEOSusout_default.gif	Use to display the sign off icon
Store Bar Top Image	STORE_BAR_TOP	ibeEOSwltr1_default.gif	Use to display the bar top image
Store Bar Bottom Image	STORE_BAR_BOTTOM	ibeEOSwltr5_default.gif	Use to display the bar bottom image
Store Bar Top Curve Image	STORE_BAR_CURVE_TOP	ibeEOSwltr2_default.gif	Use to display the top of bar curve image
Store Bar Bottom Curve Image	STORE_BAR_CURVE_BOTTOM	ibeEOSwltr3_default.gif	Use to display the bottom of bar curve image
Store Bar Tail Curve Image	STORE_BAR_CURVE_TAIL	ibeEOSbtail_default.gif	Use to display the tail of bar curve image
Selected Sites image	STORE_SEL_STORE_IMAGE	ibeTabLinkStoresS.gif	Use to display the selected site icon
Deselected Sites image	STORE_DESEL_STORE_IMAGE	ibeTabLinkStores.gif	Use to display the deselected site icon
Store copyright text	STORE_BOTTOM_CUST_COPYRIGHT	None	Use to display copyright statement at the bottom of Customer UI

Name	Programmatic Access Name	Source File	Usage Suggestion
Store privacy link	STORE_BOTTOM_C UST_PRIVACY	None	Use to display privacy link (HTML link) at the bottom of Customer UI
Store Privacy Statement	STORE_PRIVACY_ST ATEMENT	None	Use to display HTML file that states merchant's privacy policy

Language Images Seeded Values

The table below lists the seeded languages for the Language List, along with their language codes and physical media files for the "selected" language images. **Note:** The physical media files for the "deselected" language images are identical to the "selected" language media files, except for the final S on the end of the file name. For example, the physical media file mapped to the Arabic "deselected" language image is `ibeLangAR.gif`, while the "selected" physical file is `ibeLangARS.gif`.

For more information on the Language List in the Customer Application, see the chapter, *Implementing Customer Application Initial Pages*, page 6-1.

Oracle iStore Seeded Language Images

Language	Language Code	Mapped Physical Media for "Selected" Language Images
Arabic	AR	/OA_MEDIA/ibeLangARS.gif
Chinese, Simplified	ZHS	/OA_MEDIA/ibeLangZHSS.gif
Chinese, Traditional	ZHT	/OA_MEDIA/ibeLangZHTS.gif
Danish	DK	/OA_MEDIA/ibeLangDKS.gif
Dutch	NL	/OA_MEDIA/ibeLangNLS.gif

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

Other seeded media objects for the Language List are:

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

Other seeded media objects for the Language List are:

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

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