

# Oracle Fusion Cloud Applications

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**Digital Customer Service Questions  
and Answers**



Oracle Fusion Cloud Applications  
Digital Customer Service Questions and Answers

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## Get Help

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## 1 Questions and Answers

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# 1 Questions and Answers

## How do I configure DCS profile options?

This topic describes Digital Customer Service profile options, including configuration instructions.

The following two task lists apply to profile options for Digital Customer Service:

- Manage Digital Customer Service Profile Options
- Manage Digital Customer Service Account Setup Profile Options

### Overview of Profile Options

Profile options let you configure and control application data centrally. Administrators and setup users manage profile options in the Setup and Maintenance work area.

Profile options store various kinds of information, including the following:

- User preferences
- Installation information
- Configuration choices
- Processing options

Here we focus on Oracle Fusion Service profile options specific to Digital Customer Service.

### Registration Profile Options

The following table lists the profile options for Digital Customer Service Registration Profile Options.

Profile Option	Default Value	Possible Values	Effect
SVC_CSS_SELF_REGISTRATION	New Or Existing	None New Or Existing Existing Only	Specifies which contacts can self-register. If Existing is specified, only existing contacts can self-register.
SVC_CSS_SELF_REG_AUTO_APPROVE	False	True False	Enables automatic approval of self-service registration requests that are associated with an account.  If SVC_CSS_SELF_REG_AUTO_APPROVE is set to False and SVC_CSS_ACCT_ADMIN_APPROVE is set to True, then the Digital Customer Service Account Administrators can approve user registration requests in the Digital Customer Service Customer user interface. Also, Digital Customer

Profile Option	Default Value	Possible Values	Effect
			Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.
SVC_CSS_ACCT_ADMIN_APPROVE	True	True False	<p>Enables the approval of self-service user registration requests by users with Digital Customer Service Account Administrator roles.</p> <p>If set to True, Digital Customer Service Account Administrators can approve user registration requests in the Digital Customer Service customer user interface and Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.</p> <p>If set to False, only Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.</p> <p><b>Note:</b> This option applies only when the SVC_CSS_SELF_REG_AUTO_APPROVE option is set to False.</p>
SVC_CSS_ACCT_KEY_FIELD	OrganizationName	Any field in the Account object	<p>Specifies a valid field name in the Account object. The field name is case sensitive.</p> <p><b>Note:</b> You must create an attribute in the account object to be the account key, because the default account key of account name isn't secure.</p>
SVC_CSS_REG_CONT_MAP	An empty string	<p>An empty string.</p> <p>Any defined value, with a colon separating fields, and commas separating the pairs.</p> <p>For example, reg_field1:contact_field1, reg_field2:contact_field2</p>	<p>You specify a value for this profile option only if the name of the attribute in the Self Registration object is different from the name in the Contact object. Cases where they may happen are if you have created a custom attribute for an object. Custom attributes are designated with an _c, such as PlaceOfBirth_c. For this use case, you ignore the _c when</p>



Profile Option	Default Value	Possible Values	Effect
			<p>determining whether an attribute maps or not.</p> <p>So, let's take the custom attribute in the Self Registration object <b>PlaceOfBirth_c</b>. Since the Contact object has a out of the box attribute called <b>PlaceOfBirth</b>no mapping is required since the two values match. If, however, the name of the custom attribute was <b>BirthPlace_c</b> the value of this profile option would then be <b>BirthPlace_c:PlaceOfBirth</b>.</p> <p>Here's a additional example with multiple mappings:</p> <p>First, you specify case sensitive name and value pairs to map the fields of the Registration View object to the Contact View object in the following way: <b>reg_field1:contact_field1,reg_field2:contact_field2</b>.</p> <p>The <b>reg_field1</b> is the <b>PlaceOfBirth_c</b> in the Registration View Object which is a custom object created in Application Composer.</p> <p>The <b>contact_field</b> is the <b>PlaceOfBirth</b> field in the Contact View object. This attribute is already present in the Contact object.</p> <p>So the mapping would be:</p> <p><b>reg_field1:contact_field1 LIKE BirthPlace_c:PlaceOfBirth</b></p>
<b>SVC_CSS_SIGN_IN_ATTR_NAME</b>	EmailAddress	<p>The value of the assigned attribute must be unique.</p> <p>Possible values include:</p> <p>EmailAddress</p>	<p>Specifies the sign-in attribute that users must specify in the Login ID field in the Self-Service Registration object. This field is used to determine whether the user exists in the Lightweight Directory Access Protocol server.</p>
<b>SVC_CSS_REG_FLD_CONTACT</b>	EmailAddress	<p>Any field on the Self-Service Registration object.</p>	<p>Specifies the field to use during the user registration process to determine if the registering user is an existing contact. The field names are case sensitive.</p> <p>The <b>SVC_CSS_REG_CONT_MAP</b> profile option is used to locate</p>

Profile Option	Default Value	Possible Values	Effect
			the name of the attribute on the Contact.
SVC_CSS_SEND_WELCOME_EMAIL	True	True False	Enables sending a welcome email when a new user account is created.
SVC_CSS_USER_ROLE_COMMON_NAME	ORA_SVC_CUSTOMER_SELF_SERVICE_USER_ABSTRACT	A string representing the name of the role that's set up for Customer Self-Service users. Typically, this is a copy of a Customer Self-Service User with additional privileges added.	Specifies the common name of the role granted to previously created Customer Self-Service Users.
SVC_CSS_ACCT_ADMIN_ROLE_COMMON_NAME	ORA_SVC_CUSTOMER_SELF_SERVICE_ACCOUNT_ADMINISTRATOR_ABSTRACT	A string representing the name of the role that's set up for Customer Self-Service Account Administrator. Typically, this is a copy of a Customer Self-Service Account Administrator with additional privileges added.	Specifies the common name of the role granted to the previously created Customer Self-Service Account Administrators.
SVC_CSS_USER_CATEGORY	An empty string	A string	Specifies the user category that defines the URL to which the self-service user is redirected after a password reset.  The user category is defined in the Security Console.
SVC_CSS_IMP_SIGN_IN_ATTR_NAME	PrimaryEmailAddress	Any field on the Contact object.	Specifies a field in the Contact object to be used as the sign-in attribute when importing data into the Self-Service Roles object. The field name is case sensitive.
SVC_CSS_USE_FA_AS_IDP	False	True False	Specifies whether the identity provider is Oracle Fusion Applications or Oracle Identity Cloud Service.  When set to True, Oracle Fusion Applications is used.
ORA_SVC_CSS_SELF_REG_B2C_AUTO_APPROVE	True	True False	Enables automatic approval of self-service registration requests that aren't associated with an account.  If set to True, users who register without an account will be auto approved to become self-service users. If set to False, users who register without an account will need to be approved by an

Profile Option	Default Value	Possible Values	Effect
			administrator before they can become self-service users.
SVC_CSS_PUDS_CACHE_DURATION	15	Integer in minutes	Determine the amount of time, in minutes, that Self-Service Optimization objects are cached.
SVC_CSS_ALLOW_CONTACT	True	True False	Enables the self-service registration of B2C Service contacts.
SVC_CSS_ALLOW_CONSUMER	True	True False	Enables the self-service registration of consumers.
SVC_CSS_CONSUMER_USER_CATEGORY	An empty string	A string	Specify the user category for consumers defining the redirect URL for self-service users after a password reset.

## Account Setup Profile Options

The following table lists the profile options for Digital Customer Service Account Setup Profile Options.

Profile Option	Default Value	Possible Values	Effect
CSO_CONTENT_RATING_TYPE	None	True and False	Enables content rating for Knowledge.

## Set Digital Customer Service Profile Options

This topic describes how to set profile options for Digital Customer Service. The profile options specific to Digital Customer Service are found in two task areas: Manage Digital Customer Service Profile Options and Manage Digital Customer Service Account Setup Profile Options.

To find and set the Digital Customer Service profile options:

1. Sign in to Oracle Fusion Service as administrator or a setup user.
2. In the **Setup and Maintenance** work area, go to the following:
  - o Offering: Service
  - o Functional Area: Digital Customer Service
  - o Task: Manage Digital Customer Service Profile Options

or

  - o Task: Manage Digital Customer Service Account Setup Profile Options
3. Click the name of the profile option that you want to modify.

4. Set the profile option value as needed.
5. Click **Save and Close**.

## What's the Digital Customer Service design time and runtime architecture?

Oracle Digital Customer Service is an offering within Oracle Fusion Service that lets you provide your customer account users self-service access to their service requests and relevant knowledge articles through a web interface.

You can configure the Digital Customer Service application user interface to reflect a company brand. Using Oracle Visual Builder, you define root pages and styles, and include various UI components, depending on your business needs.

**Note:** To use Chat inlays in Oracle Fusion Service, you must configure some profile options. For more information, see "Configure Chat Inlay" in *Oracle Fusion Service Implementing Digital Customer Service*.

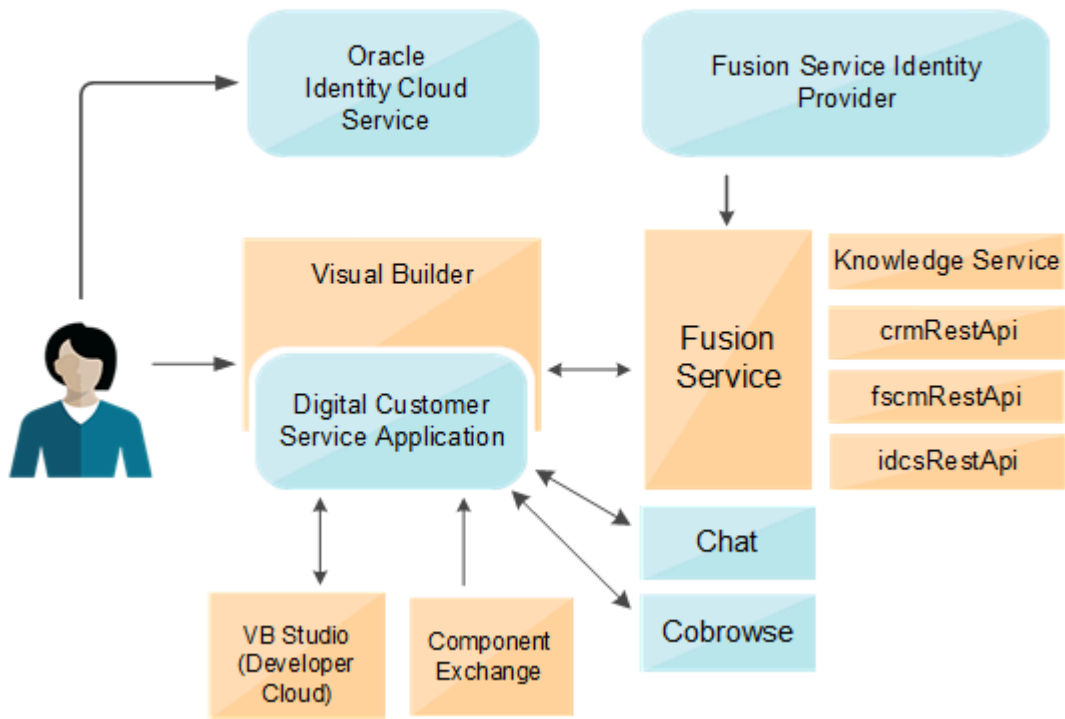
Once configured and deployed, your customers can self-serve through the application and search for knowledge articles to solve their problems. Also, your customers can register as Digital Customer Service self-service users so they can interact with your customer service representatives through service requests, work orders, or by chatting.

Here are general overviews of the design time and of the runtime architecture. The Digital Customer Service application relies on the following APIs:

- **crmRestApi**. Provides the connection to Fusion Service.
- **fscmRestApi**. Provides the connection to the Oracle Application Cloud topology manager and functional setup.
- **idcsRestApi**. Provides the connection to Oracle Identity Cloud Service.
- **knowledge-service**. Provides the connection to knowledge content and search.
- **attachmentDocTrackerRestApi**. Used by the file attachment upload mechanism.
- **attachmentUploadRestApi**. Used by the file attachment upload mechanism.
- **kmRestApi**. Used to access the Knowledge Management v2 REST API
- **utilityRestApi**. Used by ODCS Knowledge Attachment download mechanism.

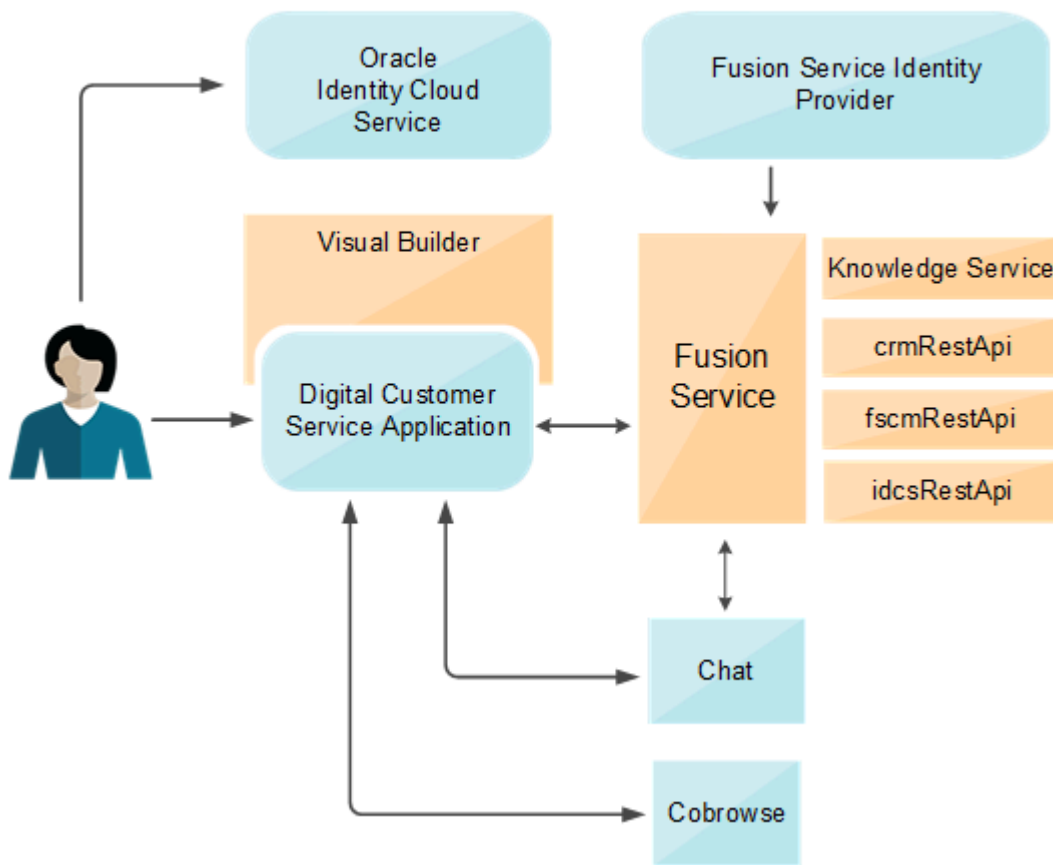
At design time, when developing a Digital Customer Service application, the developer logs into Oracle Identity Cloud Service to access the Visual Builder Designer and selects available application templates and components from the Component Exchange. The source code for the application can be maintained in a Git repository provided through the Visual Builder Studio (formerly known as Developer Cloud Service). The application is built to interact with various REST services from the associated Fusion Service instance. Here's a look at the design time architecture:

## Digital Customer Service Design Time Architecture



At runtime, a self service user interacts with the Digital Customer Service application that's served up from the Visual Builder runtime environment, and can make requests for a self-service account that's created for the user on Oracle Identity Cloud Service. The user can then sign in to Oracle Identity Cloud Service to get authenticated access to the application and use the full functionality of the application enabled by the various REST services from Fusion Service. The application might also expose Chat functionality. Here's a look at the runtime architecture:

## Digital Customer Service Run Time Architecture



## How do I configure multiple business units with Digital Customer Service?

When you have multiple business units, additional configuration is required once you have created your Digital Customer Service applications. Each business unit must have its own Digital Customer Service application.

**Note:** Only one business unit is supported per Digital Customer Service application.

Once you have created your Digital Customer Service applications, follow the instructions in the following sections of this topic:

1. Locate the business unit ID in Oracle Fusion Service.
2. Specify the business unit ID in the Digital Customer Service application.
3. Configure the Business Unit ID for the Open Service Requests list.

## Locate the Business Unit ID

To locate the business unit ID for your Digital Customer Service application:

1. Sign in to Oracle Fusion Service as an administrator or a setup user.
2. In the **Setup and Maintenance** work area, go to the following:
  - o Offering: Service
  - o Functional Area: Company Profile
  - o Task: Manage Business Unit
3. Locate your business unit in the **Search Results** list and copy the value in the **BusinessUnitId** column. If you don't see a **BusinessUnitId** column, click the **View** menu to access the **Columns** menu, and then select the columns to display.

**Note:** You will need to use the value that you copied in "Specifying the Business Unit ID and Product Catalog Usage Code in the Digital Customer Service Application" later in this answer.

## Locate the Product Catalog Usage Code

To locate the Product Catalog Usage Code for your Digital Customer Service application:

1. Sign in to Oracle Fusion Service as an administrator or a setup user.
2. In the **Setup and Maintenance** work area, go to the following:
  - o Offering: Service
  - o Functional Area: Business Units
  - o Task: Manage Service Product Group Usage for Business Unit
3. Copy the value in the **Business Unit Profile Value** text box. You will need to use the value that you copied in "Specifying the Business Unit ID and Product Catalog Usage Code in the Digital Customer Service Application" later in this answer.

**Note:** If you haven't yet set the scope for tasks, the **Select Scope** dialog box appears.

## Specify the Business Unit ID and Product Catalog Usage Code in the Digital Customer Service Application

Once you have located the business unit ID and product catalog usage code in Oracle Fusion Service, you must specify them in your Digital Customer Service application.

To specify the business unit ID and product catalog usage code:

1. Sign in to Oracle Visual Builder.
2. Open your Digital Customer Service application.
3. Click the **Web Apps** tile.
4. In the **Web Apps** tree, click **dcs**.  
A **dcs** tab appears.
5. Click the **(x)** (Variables) icon.

6. Set the business unit ID:
  - a. Click **businessUnitId**.
  - b. In the **Default Value** text box, specify the value that you copied in Step 3 of the Locating the Business Unit ID task.
7. (Optional) Set the non-default usage code:
  - a. Click **usageCode**.
  - b. In the **Default Value** text box, specify the value that you copied in Step 5 of the Locating the Product Catalog Usage Code task.
8. Refresh your Digital Customer Service application.

**Note:** When adding the **Chat** or **Category Selector** to a page, you must ensure that your **businessUnitId** property is bound to `$application.variables.businessUnitId`. Moreover, when adding the **Product Selector** to a page, its **usageCode** property must be bound to `$application.variables.usageCode`.

## How do I configure the Self-Service Registration object in Digital Customer Service?

Use this topic to configure the Self-Service Registration object.

### Overview of the Self-Service Registration Object

Digital Customer Service self-service registration requests are submitted using the Self-Service Registration object. This object is extensible and can be configured using the Application Composer in Oracle Fusion Service. With the Application Composer, you can add new fields, validation rules and triggers to the object.

The payload of the REST request to the Self-Service registration resource can supply values for the following attributes:

#### Basic attributes:

Attribute Name for the SelfRegistration Object	Display Name	Attribute in the Contact Object	Type
EmailAddress	Email Address	EmailAddress	Text
AccountKey	Account Key	AccountKey	Text
FirstName	First Name	FirstName	Text
MiddleName	Middle Name	MiddleName	Text
LastName	Last Name	LastName	Text
PlaceOfBirth	Place Of Birth	PlaceOfBirth	Text



Attribute Name for the SelfRegistration Object	Display Name	Attribute in the Contact Object	Type

**Address attributes:**

Attribute Name for the SelfRegistration Object	Display Name	Attribute in the Contact Object	Type
PrimaryAddressLine1	Primary Address Line 1	Address1	Text
PrimaryAddressLine2	Primary Address Line 2	Address2	Text
PrimaryCountry	Primary Country	Country	LOV
PrimaryCity	Primary City	City	LOV
PrimaryState	Primary State	State	LOV
PrimaryProvince	Primary Province	Province	Text
PrimaryPostalCode	Primary Postal Code	PostalCode	LOV
PrimaryAddressType	Primary Address Type	AddressType	Text
SecondaryAddressLine1	Secondary Address Line 1	Address1	Text
SecondaryAddressLine2	Secondary Address Line 2	Address2	Text
SecondaryCountry	Secondary Country	Country	LOV
SecondaryCity	Secondary City	City	LOV
SecondaryState	Secondary State	State	LOV
SecondaryProvince	Secondary Province	Province	Text
SecondaryPostalCode	Secondary Postal Code	PostalCode	LOV
SecondaryAddressType	Secondary Address Type	AddressType	Text

**Contact Point attributes:**

Attribute Name for the SelfRegistration Object	Display Name	Attribute in the Contact Object	Type
RawWorkPhoneNumber	Raw Work Phone Number	RawPhoneNumber	Text
RawMobileNumber	Raw Mobile Number	RawPhoneNumber	Text
RawHomePhoneNumber	Raw Home Phone Number	RawPhoneNumber	Text
WorkPhoneCountryCode	Work Phone Country Code	PhoneCountryCode	Text
MobileCountryCode	Mobile Country Code	PhoneCountryCode	Text
HomePhoneCountryCode	Home Phone Country Code	PhoneCountryCode	Text
WorkPhoneAreaCode	Work Phone Area Code	PhoneAreaCode	Text
MobileAreaCode	Mobile Area Code	PhoneAreaCode	Text
HomePhoneAreaCode	Home Phone Area Code	PhoneAreaCode	Text
WorkPhoneExtension	Work Phone Extension	PhoneExtension	Text
MobileExtension	Mobile Extension	PhoneExtension	Text
HomePhoneExtension	Home Phone Extension	PhoneExtension	Text
WorkPhoneNumber	Work Phone Number	PhoneNumber	Text
MobileNumber	Mobile Number	PhoneNumber	Text
HomePhoneNumber	Home Phone Number	PhoneNumber	Text

During the approval process, a contact record is created, and the attributes of the Self-Service Registration object can be transferred to the Contact object. The value assigned to the `svc_css_reg_cont_map` profile option determines which attributes in the Self-Service Registration object are transferred to which attributes in the Contact object. The default is an empty string. You specify a value for this profile option only if the name of the attribute in the Self Registration object is different from the name in the Contact object. Cases where they may happen are if you have created a custom attribute for an object. Custom attributes are designated with an `_c`, such as `PlaceOfBirth_c`. For this use case, you ignore the `_c` when determining whether an attribute maps or not. So, let's take the custom attribute in the Self Registration object `PlaceOfBirth_c`. Since the Contact object has a out of the box attribute called `PlaceOfBirth` no mapping is required since the two values match. If, however, the name of the custom attribute was `BirthPlace_c` the value of this profile option would then be `BirthPlace_c:PlaceOfBirth`.

## Usage Example

For business reasons, if additional information needs to be gathered about the user submitting a registration request, custom fields can be added to the Self-Service Registration Object. If an additional field is a required, then a value must be provided in the REST request sent to the Self-Service Registration object.

If a new required custom attribute is added to the Contact object, a new custom attribute must also be added to the Self-Service Registration object and then specified in the `svc_css_reg_cont_map` profile option. This will transfer the value of the new attribute of the Self-Service Registration object to the new attribute of the Contact object.

For example, let's say there's a custom attribute in the Self Registration object called `PlaceOfBirth_c`. This attribute can be added to the Self-Service Registration object and mapped to the **Place of Birth** attribute that already exists on the Contact object. If the name of the attribute is `BirthPlace_c` then the value of `svc_css_reg_cont_map` profile option should be `BirthPlace_c:PlaceofBirth`. You can map multiple attributes using colon separating fields, and commas separating the pairs. For more information, see the entry in the Registration Profile Options table in *How do I configure DCS profile options?*

**Note:** The **API Name** of the new attribute is different from the **Name**.

Here are the tasks that you need to complete to address this use case:

1. Create the Field
2. Test the REST Request
3. Modify the Profile Option

## Create the Field

First, you need to create the field.

To create the field:

1. Sign in to Oracle Fusion Service as an administrator or a setup user.
2. Create a sandbox for adding the Place of Birth field:
  - a. Click **Navigator > Configuration > Sandboxes**.
  - b. Click **Create Sandbox**.  
The **Create Sandbox** page appears.
  - c. Enter a name in the **Name** field.
  - d. From the All Tools list, select **Application Composer**.
  - e. Click **Create**.
  - f. In the **Available Sandboxes** list, click the name of the sandbox name that you specified in step c.
  - g. Click **Enter Sandbox**.
3. Navigate to **Application Composer**.
4. Expand **Objects**, then **Standard Objects**, then **Self-Service Registration**, and then click **Fields**.  
The **Fields** page appears.
5. Click **Create a custom field**.
6. Click the **Text** option, then click **OK**.
7. Specify the following for the Date field options:
  - o In the **Display Label** field, enter the following string:

#### Birth Place

- The **Name** field will be pre-populated based on the name that you entered for the **Display Label**, without any spaces.
- The **API Name** field will be pre-populated based on the name that you entered for the **Display Label**, without any spaces, and typically with the following suffix: `_c`

**Tip:** Note the value assigned to the **Birth Place** field, because it will be assigned to the `svc_css_reg_cont_map` profile option in the Modify the Profile Option task, later in this topic.

- Deselect the **Required** option in the **Constraints** section.
- Select the **Updatable** option in the **Constraints** section.
- Deselect the **Searchable** option in the **Constraints** section.
- Select the **Include in Service Payload** option in the **Constraints** section.

8. Click **Save and Close**.

## Test the REST Request

Use the following sample curl command to test the REST request. You must set the profile option before you complete your testing. Also, given a meaningful value for the Birth Place (`Birthplace_c`) field such as "2001-01-01".

**Note:** This is only an example. Your curl command must include details relevant to your deployment.

```
curl -X POST \  
https://myhost.us.example.com/crmRestApi/resources/11.13.18.05/selfRegistrations \  
-H 'Accept: application/json' \  
-u "<user_name>:<password>" \  
-H 'Content-Type: application/vnd.oracle.adf.resourceitem+json' \  
-d '{  
  "AccountKey": "HDFC Bank",  
  "PersonFirstName": "Lilly",  
  "PersonLastName": "Inigo",  
  "EmailAddress": "lilly.inigo@example.com" ,  
  "BirthPlace_c": "New York"
```

## Modify the Profile Option

To modify the `svc_css_reg_cont_map` profile option so that it includes the Place of Birth field:

1. Sign in to Oracle Fusion Service as administrator or a setup user.
2. In the **Setup and Maintenance** work area, go to the following:
  - Offering: Service
  - Functional Area: Digital Customer Service
  - Task: Manage Digital Customer Service Profile Options
3. Click the `svc_css_reg_cont_map` profile option.
4. Add the following profile option value to the list of values:

```
BirthPlace_c:PlaceOfBirth
```

5. Click **Save and Close**.

## Usage Example with Multiple Mappings

Now, let's briefly consider a scenario with multiple mappings.

First, you specify the case sensitive name and value pairs to map the fields of the Registration View object to the Contact View object. Here's how you do it: in the following way:

- `reg_field1:contact_field1,reg_field2:contact_field2`

Where, the `reg_field1` is the `PlaceOfBirth_c` in the Registration View Object which is itself a custom object created in Application Composer.

The `contact_field` is the `PlaceOfBirth` field in the Contact View object. This attribute is already present in the Contact object.

So the mapping would be: `reg_field1:contact_field1 LIKE BirthPlace_c:PlaceOfBirth`

## How do I activate Digital Customer Service as an existing user?

To perform this step you must have the Service Administrator role. The Service Administrator receives the "Action Required" welcome email from Oracle. As the designated activator of the Oracle Digital Customer Service service, the activator is only required to kick off the provisioning process.

1. Open the email prefaced "Action Required" that you received from Oracle Cloud.
2. Review the information about your service in the email, and then click the provided link to activate your service..
3. Enter your cloud account name, and click **Next**.
4. Click **Continue** on the Cloud Tenant page.
5. On the log in page, enter your cloud account credentials, and click **Sign In**.

The My Services page appears.

6. Click the **Manage Account** tile.
7. On the Account page, click the **Activate** tab.
8. Choose the service you want to activate, and click the **Cloud Services Account Setup** button.
9. Click the **Cloud Account Name** drop down list and select the cloud account you want to activate the service into and then click the **Assign Account** button.

You receive a Review Summary message when the order is successfully activated.

10. Click **Close** to complete the activation phase.

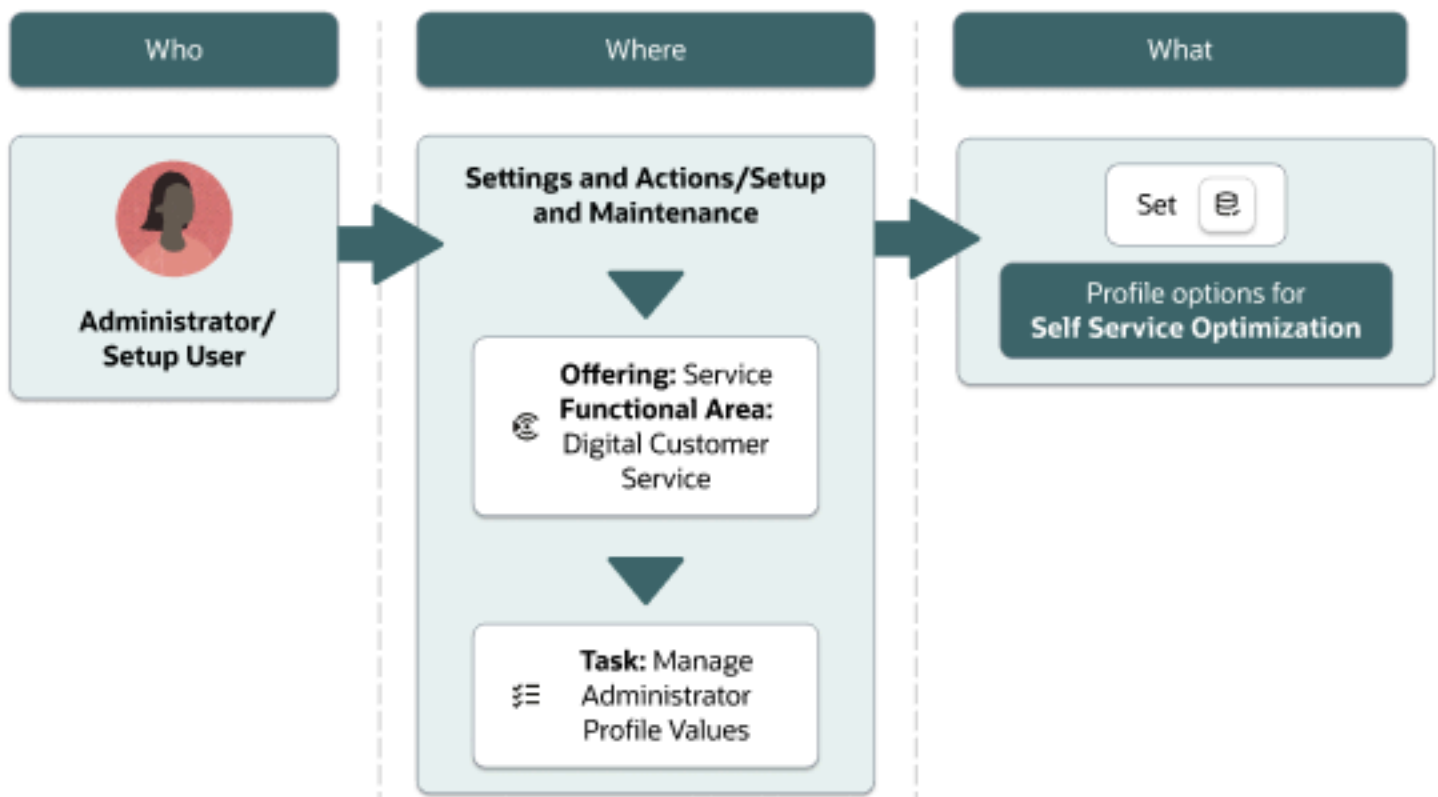
The account is now ready to use.

# How do I set profile options for Self-Service Optimization?

Self-Service Optimization gives you greater flexibility by using proxy users in Fusion Service

You must set the required profile options for Self-Service Optimization. There are also optional profile options for other functionality.

## Set profile options for Self-Service Optimization



## Set Required Digital Customer Service Profile Options

The profile options specific to Digital Customer Service are found in two task areas: Manage Digital Customer Service Profile Options and Manage Digital Customer Service Account Setup Profile Options.

1. Sign in to Oracle Fusion Service as administrator or a setup user.

2. In the **Setup and Maintenance** work area, go to the following:
  - o Offering: Service
  - o Functional Area: Digital Customer Service
  - o Task: Manage Digital Customer Service Profile Options
 or
  - o Task: Manage Digital Customer Service Account Setup Profile Options
3. Click the name of the profile option that you want to change.
4. Set the profile option value as needed.
5. Click **Save and Close**.

Required Profile Options and Descriptions	Default Value	Comments
FND_IDP_PROXY_USER_WHITELIST Used to identify the list of allowed proxy users.	None	Enter a comma-separated list of proxy user names.  <b>Note:</b> There must be no spaces between the commas and the names.
ORA_CORS_ORIGINS List of trusted domains that can make requests.	None	*, or specific comma-separated fully qualified domain names.
CORS_ACCESS_CONTROL_ALLOW_HEADERS Specifies comma-separated list of headers that are allowed as part of a CORS request.		Add these values, in the comma separated list, if they're not present:  Puds-Access-Token, kmauthtoken, content-language, X-Oracle-ABCS-SessionId, X-Oracle-ABCS-UserId
SVC_CSS_PUDS_CACHE_DURATION Decides the amount of time, in minutes, that Proxy User Data Service objects are cached.	15 minutes	Any changes to this parameter will force a refresh of the proxy users configuration data cache.
SVC_CSS_USE_FA_AS_IDP Identifies if self-service users are created in Fusion Service or in IDCS.	False.	Make sure this value is set to False for self-service optimization mode.

## Set Optional Profile Options

Profile options enable you to configure and control application data centrally. They store user preferences, installation information, configuration choices, and processing options. Administrators and setup users manage profile options in the Setup and Maintenance work area.

## Registration Profile Options

Profile Option	Default Value	Possible Values	Effect
SVC_CSS_SELF_REGISTRATION	New Or Existing	None New Or Existing Existing Only	Specifies which contacts can self-register. If Existing is specified, only existing contacts can self-register.
SVC_CSS_SELF_REG_AUTO_APPROVE	False	True False	<p>Enables automatic approval of self-service registration requests that are associated with an account.</p> <p>If SVC_CSS_SELF_REG_AUTO_APPROVE is set to False and SVC_CSS_ACCT_ADMIN_APPROVE is set to True, then the Digital Customer Service Account Administrators can approve user registration requests in the Digital Customer Service Customer user interface. Also, Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.</p>
SVC_CSS_ACCT_ADMIN_APPROVE	True	True False	<p>Enables the approval of self-service user registration requests by users with Digital Customer Service Account Administrator roles.</p> <p>If set to True, Digital Customer Service Account Administrators can approve user registration requests in the Digital Customer Service customer user interface and Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.</p> <p>If set to False, only Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.</p> <p><b>Note:</b> This option applies only when the SVC_CSS_SELF_REG_AUTO_APPROVE option is set to False.</p>



Profile Option	Default Value	Possible Values	Effect
SVC_CSS_ACCT_KEY_FIELD	OrganizationName	Any field in the Account object	<p>Specifies a valid field name in the Account object. The field name is case sensitive.</p> <p><b>Note:</b> You must create an attribute in the account object to be the account key, because the default account key of account name isn't secure.</p>
SVC_CSS_REG_CONT_MAP	An empty string	<p>An empty string.</p> <p>Any defined value, with a colon separating fields, and commas separating the pairs.</p> <p>For example, reg_field1:contact_field1, reg_field2:contact_field2</p>	<p>You specify a value for this profile option only if the name of the attribute in the Self Registration object is different from the name in the Contact object. Cases where they might happen are if you've created a custom attribute for an object. Custom attributes are designated with an _c, such as PlaceOfBirth_c. For this use case, you ignore the _c when decide whether an attribute maps or not.</p> <p>So, let's take the custom attribute in the Self Registration object <b>PlaceOfBirth_c</b>. Because the Contact object has a ready to use attribute called <b>PlaceOfBirth</b>no mapping is required because the two values match. If, however, the name of the custom attribute was <b>BirthPlace_c</b> the value of this profile option would then be <b>BirthPlace_c:PlaceOfBirth</b>.</p> <p>Here's an extra example with multiple mappings:</p> <p>First, you specify case sensitive name and value pairs to map the fields of the Registration View object to the Contact View object in the following way: <b>reg_field1:contact_field1,reg_field2:contact_field2</b>.</p> <p>The <b>reg_field1</b> is the <b>PlaceOfBirth_c</b> in the Registration View Object which is a custom object created in Application Composer.</p> <p>The <b>contact_field</b> is the <b>PlaceOfBirth</b> field in the Contact View object. This attribute is already present in the Contact object.</p> <p>So the mapping would be:</p>

Profile Option	Default Value	Possible Values	Effect
			<code>reg_field1:contact_field1 LIKE BirthPlace_c:PlaceOfBirth</code>
<b>SVC_CSS_SIGN_IN_ATTR_NAME</b>	EmailAddress	The value of the assigned attribute must be unique.  Possible values include:  EmailAddress	Specifies the sign-in attribute that users must specify in the Sign in ID field in the Self-Service Registration object. This field is used to decide whether the user exists in the Lightweight Directory Access Protocol server.
<b>SVC_CSS_REG_FLD_CONTACT</b>	EmailAddress	Any field on the Self-Service Registration object.	Specifies the field to use during the user registration process to decide if the registering user is an existing contact. The field names are case sensitive.  The SVC_CSS_REG_CONT_MAP profile option is used to find the name of the attribute on the Contact.
<b>SVC_CSS_SEND_WELCOME_EMAIL</b>	True	True  False	Enables sending a welcome email when a new user account is created.
<b>SVC_CSS_USER_ROLE_COMMON_NAME</b>	<code>ORA_SVC_CUSTOMER_SELF_SERVICE_USER_ABSTRACT</code>	A string representing the name of the role that's set up for Customer Self-Service users. Typically, this is a copy of a Customer Self-Service User with extra privileges added.	Specifies the common name of the role granted to previously created Customer Self-Service Users.
<b>SVC_CSS_ACCT_ADMIN_ROLE_COMMON_NAME</b>	<code>ORA_SVC_CUSTOMER_SELF_SERVICE_ACCOUNT_ADMINISTRATOR_ABSTRACT</code>	A string representing the name of the role that's set up for Customer Self-Service Account Administrator. Typically, this is a copy of a Customer Self-Service Account Administrator with extra privileges added.	Specifies the common name of the role granted to the previously created Customer Self-Service Account Administrators.
<b>SVC_CSS_USER_CATEGORY</b>	An empty string	A string	Specifies the user category that defines the URL to which the self-service user is redirected after a password reset.  The user category is defined in the Security Console.
<b>SVC_CSS_IMP_SIGN_IN_ATTR_NAME</b>	PrimaryEmailAddress	Any field on the Contact object.	Specifies a field in the Contact object to be used as the sign-in attribute when importing data into

Profile Option	Default Value	Possible Values	Effect
			the Self-Service Roles object. The field name is case sensitive.
SVC_CSS_USE_FA_AS_IDP	False	True False	Specifies whether the identity provider is Oracle Fusion Applications or Oracle Identity Cloud Service.  When set to True, Oracle Fusion Applications is used.
ORA_SVC_CSS_SELF_REG_B2C_AUTO_APPROVE	True	True False	Enables automatic approval of self-service registration requests that aren't associated with an account.  If set to True, users who register without an account will be auto approved to become self-service users. If set to False, users who register without an account will need to be approved by an administrator before they can become self-service users.
SVC_CSS_PUDS_CACHE_DURATION	15	Integer in minutes	Decide the amount of time, in minutes, that Self-Service Optimization objects are cached.
SVC_CSS_ALLOW_CONTACT	True	True False	Enables the self-service registration of B2C Service contacts.
SVC_CSS_ALLOW_CONSUMER	True	True False	Enables the self-service registration of consumers.
SVC_CSS_CONSUMER_USER_CATEGORY	An empty string	A string	Specify the user category for consumers defining the redirect URL for self-service users after a password reset.

## Knowledge Setup Profile Options

Profile Option	Default Value	Possible Values	Effect
CSO_CONTENT_RATING_TYPE	None	True and False	Enables content rating for Knowledge.

## How do I enable my own sign in pages?

To enable your own sign-in pages, you must first update your Digital Customer Service application configuration to use Digital Customer Service as the Security provider.

After doing this, VBCS will inject data into the `app-flow.json` file which will allow the Digital Customer Service

Security Provider to have access to the same IDCS configuration information as the standard VB security provider. In addition to enabling you to create your own sign-in page, using the Digital Customer Service Security Provider enables you to use the Change Password button on the My Profile page in the out of the box reference implementation. That button takes the user to the reference implementation's Change Password page.

1. Using the application navigator's Source View, navigate to **webApps > webAppName > app-flow.json**.
2. Locate the `userConfig` element in the `app-flow.json` file of the application in the DT editor, and replace the child element `"type": "vb/DefaultSecurityProvider"` with `"type": "oj-odcs/application-common/OdcsSecurityProvider"`.
3. Then, add `"defaultSecurity": true`.

This entry must be a child element of the `"userConfig/configuration"` element which tells VBCS to send IDCS configuration data to the `app-flow.json` file during application staging. Here's how the updated `"userConfig"` element should look:

```
"userConfig": {
  "type": "oj-odcs/application-common/OdcsSecurityProvider",
  "configuration": {
    "defaultSecurity": true,
    "authentication": {
      "type": "implicit"
    }
  },
  "embedding": "deny"
}
```

You can optionally specify the custom sign-in page for Digital Customer Service by setting `userConfig.configuration.odcsLoginPath` to point to a VB page path. If this path isn't specified, the RI default of `shell/sign-in` is used.

## Set the Service Instance URL

Now you must set the service instance URL for the `idcsRestApi` Service Connection.

1. In Oracle Visual Builder, open your Digital Customer Service application (if it's not open already).
2. Click Service Connections, click **idcsRestApi**, and then click the **Servers** tab.
3. Click **Edit**, then in the Edit Server page, edit the Instance URL to be the URL of your IDCS server. For example: `https://idcs-xxx.identity.yyy.idcs-example.com`.
4. Click **Save**.

## Verify the Identity Cloud Service Identity Provider Policy

If you have a custom sign-in page for your Digital Customer Service application confirm that IDCS is enabled to use the User Name-Password authentication factor.

1. In the Identify Cloud Service administration console, click the Navigation Drawer, the expand **Security**, and choose **IDP Policies**.
2. Click **Default Identity Provider Policy**, and then the **Identity Provider Rules** tab.
3. Click the **Menu** icon and choose **Edit**.
4. In the Edit Default IDP Rule dialog box, make sure **Username-Password** is shown in the **Allowed Identity Providers** box. If not, do the following:
  - a. Click in the **Assign Identity Providers** box, and select **Username-Password**.
  - b. Click **Save**.

If you don't want to add `username-Password` to the Default Identity Provider Policy, you can add a new IDP Policy for the Digital Customer Service application to use. When you create the new policy, add a rule that allows the Username-Password Identity Provider and assign the VBINST\_XXXXX application to the policy. This will ensure that the application uses the new IDP policy instead of the default IDP policy.

For more information, see Related Topics for a link to the Identity Cloud Service documentation.

### Related Topics

- [Understand Identity Provider Policies](#)

## What are the work order components?

This topic lists and describes work order components.

The following table describes components specific to Work Orders. It also lists the restrictions associated with the component and any additional configuration required.

**Note:** To use work orders in your Digital Customer Service application, you must first complete the setup of either general work orders or Oracle Field Service work orders with Fusion Service. For more information, refer to the following guides:

- [Integrating Fusion Service with Field Service](#)
- [Implementing Fusion Service](#)

Component Name	Description
Work Order List	Displays a list of work orders to the account user in a preconfigured Oracle Visual Builder list view. The presentation of a row can be edited. Provides the capability to search for a work order and sort the list of work orders.
Work Order Data	Displays the summary details of a work order. Provides the capability to update contact information, add a message for the technician, reschedule a work order and cancel a work order. It also provides information about the technician and displays the technician's location.

Component Name	Description
	<p><b>Note:</b> Self-Service users can only reschedule Oracle Field Service work orders, not generic work orders.</p>

## How do I set up Digital Customer Service self-service registration?

There are two types of Self-Service registration requests, Fusion and B2C.

- You allow Fusion requests by setting the value of the SVC\_CSS\_ALLOW\_CONTACT profile option to TRUE.
- You allow B2C requests by setting the SVC\_CSS\_ALLOW\_CONSUMER profile option to TRUE.

The following users can submit self-service registration requests::

- Anonymous Users
- User with Customer Self-Service Administration duty role
- User authenticated by IDCS through the Proxy User Data Service

Here's how the self-service registration request works:

First, the registration request is validated. If no errors are found, the status of the request is set to ORA\_CSS\_PENDING. If the value of profile option (either SVC\_CSS\_ALLOW\_CONTACT for Fusion, or SVC\_CSS\_ALLOW\_CONSUMER for B2C) is set to TRUE then the process continues.

If the profile option is set to FALSE, then the request must be manually initiated by a user with either the Customer Self-Service Account Administrator job role or Customer Self-Service Account Administration duty role. The name of the profile option is SVC\_CSS\_SELF\_REG\_AUTO\_APPROVE for Fusion requests and ORA\_SVC\_CSS\_SELF\_REG\_B2C\_AUTO\_APPROVE for B2C requests.

Here's the expected result:

- The user account in IDCS with the Customer Self-Service User job role (or job role given by profile option SVC\_CSS\_USER\_ROLE\_COMMON\_NAME) will be present.
- The contact in Fusion Service, stamped with the GUID of the user account in IDCS.
- The contact is given the Self-Service User role.
- If the request was of the Fusion type:
  - A relationship between the business account and the contact is indicated.
  - If the user is the first user of a business account the user is given the Customer Self-Service Account Administrator job role (or a job role given by the SVC\_CSS\_ACCT\_ADMIN\_ROLE\_COMMON\_NAME profile option).

The primary attributes that influence the Self-Service registration are:

- Request Type Code (RequestTypeCd). If this attribute is absent in the request payload or if the value of this attribute is ORA\_CSS\_REQ\_TYPE\_CONTACT then its a Fusion request. If the value of this attribute is ORA\_CSS\_REQ\_TYPE\_CONSUMER then it's a B2C request.
- Account Key (AccountKey). For Fusion requests, this attribute is expected to identify a unique business account. The profile option SVC\_CSS\_ACCT\_KEY\_FIELD determines the attribute of the Account object whose value must be the specified account key value. The default value of this profile option is OrganizationName but it can be set to any attribute of the account object whose value is unique to a single account.
- Email Address (EmailAddress). This attribute is the default value of the SVC\_CSS\_REG\_FLD\_CONTACT profile option and is used to locate an existing contact. You can set this profile option to any attribute on the Self-Service Registration object. The corresponding attribute on the Contact object is located either using auto mapping logic or using the value of the SVC\_CSS\_REG\_CONT\_MAP profile option. The email address of the located contact and the email address of the registration request must be the same.
- Login ID (LoginId). If a value for this attribute isn't specified, the value will be set to the value of the attribute identified by the SVC\_CSS\_SIGN\_IN\_ATTR\_NAME profile option whose default value is EmailAddress. Login ID is used to locate a user account in the Identity database.

The following table shows the actions taken based on the result of searching for existing contact and user account:

Search Result	Action
Contact doesn't exist but the user account exists.	A contact record is created and the GUID of the user account is stamped on the contact if the user submitting the registration request is authenticated by IDCS or the user submitting the registration request has been given the Associate User With Contact privilege. The Associate User With Contact privilege is given by default only to users with the Customer Self-Service Administration duty role.
Contact exists and the user exists and contact record isn't stamped with the GUID of the user account.	The GUID of the user is stamped on the contact provided the user submitting the registration request is authenticated by IDCS and the email address of the user account is same as that of the registration request or the user submitting the registration request has been given the Associate User With Contact privilege.
Contact exists and the user exists and contact record is stamped with the GUID of the user account.	If this is a Fusion request, the user already has a self-service user role for one account and is granted the self-service role for another account.
Contact exists but user account isn't found.	A user account is created and the contact is stamped with the GUID of the user account.
Neither a contact nor a user account is found	The records are created and the contact record is stamped with GUID of the user account.

After the contact record is created, the attributes of the Self-Service Registration object are copied over to the Contact object. If the name of an attribute of the SelfRegistration object (ignoring \_c) is same as that of the Contact object then the value of that attribute is copied over. If the names aren't the same then the SVC\_CSS\_REG\_CONT\_MAP profile option can be used to map an attribute of the SelfRegistration object to an attribute of the Contact object.

## How do I activate Digital Customer Service as a new customer?

To perform this step you must have the Service Administrator role. The Service Administrator receives the "Action Required" welcome email from Oracle. As the designated activator of the Oracle Digital Customer Service service, the activator is only required to activate Digital Customer Service.

After that, the activator can select a different service administrator to manage the day-to-day administration of the service during the activation process if necessary.

1. Open the email prefaced "Action Required" that you received from Oracle Cloud.
2. Review the information about your service in the email, and then click the provided link to activate your service.
3. In the Activate My Service form, do the following:
  - a. Enter a cloud account name.  
  
This name is used to identify your cloud account. We recommend that you use the same Oracle Cloud account that Fusion Service resides in.
  - b. Enter Administrator details, and if you're not going to be the Service Administrator going forward, assign the new Service Administrator at this time.
4. Click **Create Account** to proceed to submit your request.
5. Click **Close**.

The account is now active and ready to use.