Oracle Fusion Cloud Applications

Digital Customer Service Questions and Answers

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Contents

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1 Questions and Answers

How do I manage Self-Service users?

Users can be granted different roles. By default, when a registration request is approved for a user, they are granted the User role. However, administrators can grant or remove roles, depending on the user's intended responsibilities.

> **Note:** The first user to be approved for a customer account is automatically granted the Account Administrator role. There must always be one user with the Account Administrator role for an account.

Use this topic to add and remove roles for self-service users in Oracle Fusion Service. For more information about self-service user roles, see About Digital Customer Service Roles.

To manage self-service roles for an account:

1. Sign in as a user with the Customer Self-Service Administrator role.
2. Navigate to the **Service** work area and click **Self-Service Users**.
3. From the **Self-Service Users** list, select the user you want to modify.
4. In the **User Administration** section, select or deselect one or more of the following roles:
    - **User**
    - **Account Manager**
    - **Account Administrator**

    > **Note:** Removing the User role causes the removal of all privileges. The only way to restore the privileges is to submit a new registration request. Only a user with the SVC_DELETE_LAST_ACCOUNT_ADMIN_ROLE_PRIV privilege can delete the user role for the last Account Administrator. Users with the Customer Self-Service Administration role have the SVC_DELETE_LAST_ACCOUNT_ADMIN_ROLE_PRIV privilege by default. The last account administrator can only be deleted using the selfServiceRoles REST API.
5. Click **Save**.

    A dialog appears, confirming the role modifications.

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 Service Administrators can approve registration requests in the Digital Customer Service Administration user interface.
SVC_CSS_ACCT_ADMIN_APPROVE	True	True False	Enables the approval of self-service user registration requests by users with Digital Customer Service Account Administrator roles. 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

Profile Option	Default Value	Possible Values	Effect
			Customer Service Administration user interface. If set to False, only Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface. **Note:** This option applies only when the SVC_ CSS_ SELF_ REG_ AUTO_APPROVE option is set to False.
`SVC_CSS_ACCT_KEY_FIELD`	OrganizationName	Any field in the Account object	Specifies a valid field name in the Account object. The field name is case sensitive. **Note:** 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.
`SVC_CSS_REG_CONT_MAP`	An empty string	An empty string. Any defined value, with a colon separating fields, and commas separating the pairs. For example, reg_field1:contact_field1, reg_field2:contact_field2	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`. Here's a additional example with multiple mappings: First, you specify case sensitive name and value pairs to map

Profile Option	Default Value	Possible Values	Effect
			the fields of the Registration View object to the Contact View object in the following way: **reg_field1:contact_field1,reg_field2:contact_field2**. The **reg_field1** is the PlaceOfBirth_c in the Registration View Object which is 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**
SVC_CSS_SIGN_IN_ATTR_NAME	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 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.
SVC_CSS_REG_FLD_CONTACT	EmailAddress	Any field on the Self-Service Registration object.	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. The SVC_CSS_REG_CONT_MAP profile option is used to locate 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	Specifies the common name of the role granted to the previously

Profile Option	Default Value	Possible Values	Effect
		Administrator. Typically, this is a copy of a Customer Self-Service Account Administrator with additional privileges added.	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 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

Profile Option	Default Value	Possible Values	Effect
			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:
    - Offering: Service
    - Functional Area: Digital Customer Service
    - Task: Manage Digital Customer Service Profile Options

      or
    - 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.

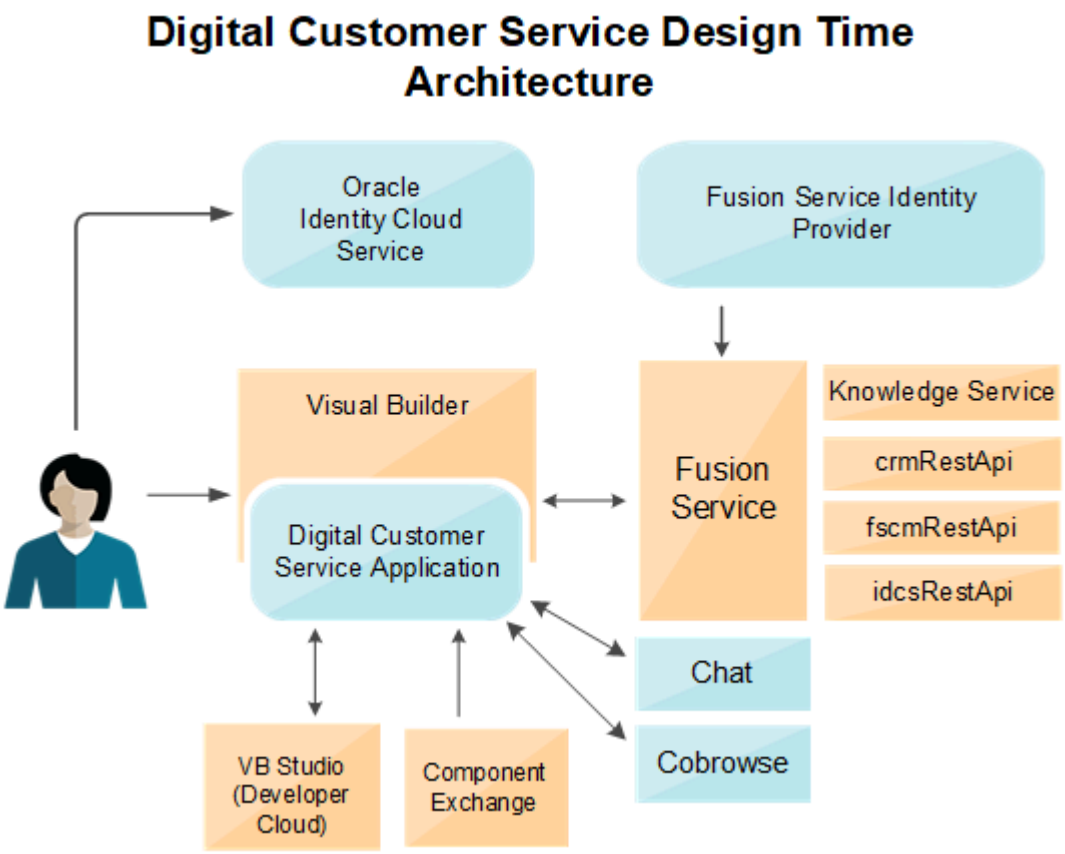
Note: To use Chat inlays in Oracle Fusion Service, you must configure some profile options. For more information, see "Configure Chat Inlay" in *Oracle Fusion Service Implementing Digital Customer Service*.

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.

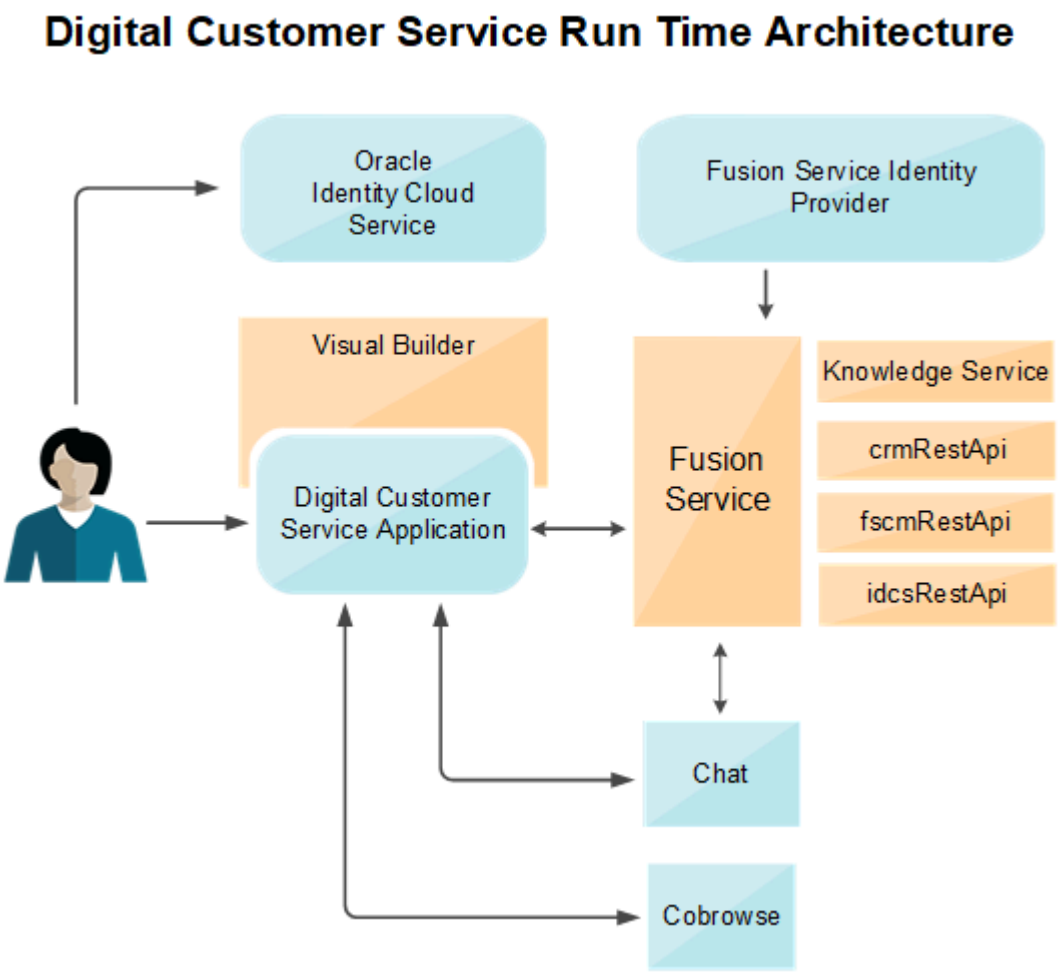
Here are general overviews of the design time and of the runtime architecture. The Digital Customer Service application relies on the following APIs:

- **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:



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:



How do I Import Self-Service users?

This topic shows you how to import self-service users for use with your Digital Customer Service application.

Use cases for import include when you're migrating from one service implementation solution to Digital Customer Service, or when you've a new customer account and have been supplied with a list of authorized users.

If you're migrating from another service implementation to Digital Customer Service, you might have some existing reference identifiers that you'll want to retain from the originating service implementation. In this particular case, the following fields might help: AccountPartyNumber from the accounts, ContactPartyNumber from the contacts.

First you must create a contact. Once you've created the contact, you've two choices: you can use the Contact Party ID or Contact Party number. When contacts are created or imported, the contact party ID is automatically assigned. You can explicitly specify the Contact Party number. If you choose not to specify the Contact Party number, a number will be automatically assigned.

Accounts are handled in much the same way. An Account Party ID is automatically assigned, and you can choose to specify an Account Party number or have one automatically assigned.

Finally, there's a primary key for the imported data set. The value of the primary key column is automatically generated in the Oracle Fusion Applications data model.

Here's a high level overview of what you'll be doing when importing self-service users:

- Creating contacts
- Downloading the Self-Service Roles template.
- Preparing the Import file, then importing the users.
- Sending pending LDAP requests.

Note: When using the import process for creating self-service users, there's no other approval step required.

Create Contacts

Your first step is to create the contacts. The contact must have an email address. To create contacts, follow the instructions in the Import Your Contact Data task in the Related Topics list. This might also require you do the Import Your Account Data task, which is also in the Related Topics list, if you haven't already done that yet.

Download the Self-Service Role Template

This section describes how to download the self-service roles template.

The Self-Service roles template contains the following fields:

Field	Usage
AccountPartyId	A required field if the AccountPartyNumber value isn't specified. Don't provide this value for B2C.
AccountPartyNumber	A required field if the AccountPartyId value isn't specified. Don't provide this value for B2C.
ContactPartyId	A required field if the ContactPartyNumber value isn't specified.
ContactPartyNumber	A required field if the ContactPartyId value isn't specified.
LoginId	An optional field. If a value isn't specified its assigned the value of a Contact attribute specified by the SVC_CSS_IMP_SIGN_IN_ATTR_NAME profile option. The default value for this profile option is Email Address.
RelationshipTypeCd	A required field. The following values can be assigned: • **ORA_CSS_USER**. This corresponds to the Digital Customer Service User role. • **ORA_CSS_ACC_MGR**. This corresponds to the Digital Customer Service Account Manager role. • **ORA_CSS_ACC_ADMIN**. This corresponds to the Digital Customer Service Account Administrator role.
RequestTypeCd	A required field for B2C. An optional field for Fusion. The following values can be assigned: • **ORA_CSS_REQ_TYPE_CONTACT**. This Fusion Service value corresponds to the Fusion Contact.

Field	Usage
	• `ORA_CSS_REQ_TYPE_CONSUMER`. This B2C Service value that corresponds to the B2C Consumer.
RoleId	An optional field. You can remove from the first row of the file.

To download the Self-Service roles template file:

1. Sign in to Oracle Fusion Service as an administrator or a setup user.
2. From the Navigator menu, expand **Tools**, and then select **Import Management**.
3. In the **Manage Imports** work area, click the **Import Objects** tab, and select **Search**.
4. In the Import Object Details page, enter **Self-Service Role** in the Display Name search box.
5. Click **Download** and then save the .zip file to a convenient directory.

Prepare the Import File

This section describes how to prepare the import file for importing self-service users.

> **Note:** When users are imported into multiple accounts the data should be sorted by account party ID. This maximizes the possibility of the one thread handling users of the same account and minimize the possibility of deadlocks occurring due to different threads changing the same account. If all the users belong to the same account, then its recommended that you use Oracle Integration Cloud integration and retry the logic for handling account row lock exception.

To prepare the import file:

1. Find, and open the **Self-Service Role_Templates<date>.zip** file that you saved in the Download the Self-Service Role Template topic.
2. Extract, then open the **SelfServiceRole.csv** file.

3. For each self-service user you plan to import, enter the following data in a dedicated row:

    a. Enter the account information relating to the self-service user in the **AccountPartyId** or **AccountPartyNumber** column.

    > **Note:** The Account ID value isn't needed for B2C Service requests.

    > **Tip:** To quickly find the values for **AccountPartyId** or **AccountPartyNumber** using REST API, run the following command as an administrator:
    >
    > `GET <Oracle-Fusion-Application-Host>/crmRestApi/resources/11.13.18.05/accounts/`

    b. Enter the contact information relating to the self-service user in the **ContactPartyId** or **ContactPartyNumber** column.

    > **Note:** When importing the Contacts, it's possible to provide a unique identifier for each contact in the form of the ContactPartyNumber. This must be unique for each user. So you should provide the same unique numbers for ContactPartyNumber for the user in the Contact import file and the Self-Service Roles import file to match them up.

    c. Enter the ID relating to the self-service user in the **LoginId** column.

    > **Note:** If the `SVC_CSS_IMP_SIGN_IN_ATTR_NAME` profile option is set, then the `LoginId` is optional.

    d. Enter the Digital Customer Service roles to assign to the self-service user in the **RelationshipTypeCd** column. The following values can be assigned:

    - `ORA_CSS_USER`. This corresponds to the Digital Customer Service User role.
    - `ORA_CSS_ACC_MGR`. This corresponds to the Digital Customer Service Account Manager role.
    - `ORA_CSS_ACC_ADMIN`. This corresponds to the Digital Customer Service Account Administrator role.

    > **Note:** The ORA_CSS_ACC_MGR and ORA_CSS_ACC_ADMIN roles by themselves can be only used if the self-service user already exists. If the import is going to create a new self-service user the ORA_CSS_ACC_MGR and ORA_CSS_ACC_ADMIN roles must be combined with ORA_CSS_USE role. To assign multiple roles to a user concatenate them using the `&` character. For example: ORA_CSS_USER&ORA_CSS_ACC_ADMIN.

    e. Enter the Digital Customer Service roles to assign to the self-service user in the **RequestTypeCd** column. If a value isn't supplied the default is `ORA_CSS_REQ_TYPE_CONTACT`.

    The following values can be assigned:

    - `ORA_CSS_REQ_TYPE_CONTACT`. This value is for Fusion Service instances and corresponds to the Fusion Contact.
    - `ORA_CSS_REQ_TYPE_CONSUMER`. This value is for B2C Service instances and corresponds to the B2C Consumer. B2C is general public.

4. Repeat step 4, on a dedicated row for each more self-service user you want to import.

    > **Note:** For each `AccountPartyId` or `AccountPartyNumber`, at least one user in the import file must have the `ORA_CSS_ACC_ADMIN` role assigned.

5. Save the **SelfServiceRole.csv** file.

6. Include the **SelfServiceRole.csv** in a new **Self-Service Role_Templates<date>.zip** archive, and save it.

> **Tip:** When using a Mac, you must the `zip` utility in terminal to create the **Self-Service Role_Templates<date>.zip** file.

Consider the following sample data in the **SelfServiceRole.csv** file:

Example 1: **Using Party IDs for import**

```
AccountPartyId,ContactPartyId,RelationshipTypeCd
300100110957452,300100156316610,ORA_CSS_User & ORA_CSS_ACC_ADMIN
```

Example 2: Using Party numbers for import

```
AccountPartyNumber,ContactPartyNumber,RelationshipTypeCd
CDRM_67617,CDRM_743628,ORA_CSS_USER
CDRM_67617,CDRM_743711,ORA_CSS_USER&ORA_CSS_ACC_ADMIN
CDRM_67617,CDRM_743651,ORA_CSS_USER&ORA_CSS_ACC_MGR
```

Example 3: **The Login ID explicitly used**

```
AccountPartyNum,ContactPartyNum,LoginId,RelationshipTypeCd
CDRM_67617,CDRM_743628,Mary.Smith,ORA_CSS_USER
CDRM_67617,CDRM_743711,John.Rogers,ORA_CSS_USER&ORA_CSS_ACC_ADMIN
CDRM_67617,CDRM_743651,Pat.Williams,ORA_CSS_USER&ORA_CSS_ACC_MGR
```

Example 4: **B2C**

```
ContactPartyNum,RelationshipTypeCd, RequestTypeCd
CDRM_943831,ORA_CSS_USER, ORA_CSS_REQ_TYPE_CONSUMER
CDRM_943832,ORA_CSS_USER, ORA_CSS_REQ_TYPE_CONSUMER
```

Import the Self-Service Users

Before proceeding with the instructions in this section, you must have completed the steps in the previous sections:

- Downloading the Self-Service Roles Template
- Preparing the Import File

> **Note:** For best performance set the value of profile option `ZCA_STANDARD_IMPORT_COMMIT_SIZE` to 1. If `SVC_CSS_USE_FA_AS_IDP` is enabled (set to TRUE) you must set the `ZCA_STANDARD_IMPORT_COMMIT_SIZE` value to 1. This must be done for the following reasons. The default value for commit size is 100. This value also influences the `retry` logic built into the import framework. An error in any one import row will cause the entire batch to roll back. For self-service import when IDCS is the IDP, the impact of rollback is severe because many users determined by the commit size have been created and needs to be rolled back. With `retry` the impact is even more severe because there could be more than 1 rollback for the same batch causing the import process to slow down considerably.

To import the self-service users:

1. Sign in to Oracle Fusion Service as an administrator or a setup user.
2. From the Navigator menu, expand **Tools**, and then select **Import Management**.
3. In the **Manage Imports** work area, click the **Create Import Activity** button.

4. In the **Create Import Activity** workspace, enter the following import options:
    a. In the required **Name** field, enter a name for the import activity.
    b. In the optional **Description** field, enter a description of the import activity.
    c. Click the **Object** drop-down list, and search for **Self-Service Role**.
    d. Click the File Name **Browse** button and find the `SelfServiceRole.csv` file you downloaded.
5. Click **Next**.
6. Verify the mappings are as expected. If necessary, make your corrections.
7. Click **Validate Data**.
8. Click **Next**.

    The **Create Import Activity: Review and Submit** screen is displayed.
9. Click the **Submit** button.

    Your import job is listed in the **Manage Import Activities** list. The **Status** value of your job will change multiple times during processing, until it's **Completed** or **Completed with Errors**.
10. From the **Manage Imports** workspace, click the **My Completed Imports** tile and select the link for your import from the list and review the import details.
11. (Optional) Review errors. If the Status value is **Completed with Errors**, some users might not have been imported. Follow these steps to review the errors:
    a. On the **Import Status** workspace, click the **Actions** menu and select Generate Diagnostics.
    b. Download the generated `zip` file, to review the diagnostic messages .

Send Pending LDAP Requests

Perform this task after successfully importing the self-service user roles.

> **Note:** This topic is only required only if SVC_CSS_USE_FA_AS_IDP profile option is set to TRUE.

With the import of the self-service roles to associate with the contact records, the final step to enable a self-service user account is to create the user account in the Oracle Fusion Service identity management system. This is in turn synchronized with Oracle Identity Cloud Service, allowing users to sign in. To create the user account in the Oracle Fusion Service identity management system, the **Send Pending LDAP Requests** job needs to be run.

To send the pending LDAP requests:

1. Sign in to Oracle Fusion Service as an administrator or a setup user.
2. Navigate to the **Scheduled Processes** work area.
3. Click **Schedule New Process**.

    The **Schedule New Process** dialog box appears.
4. Select the **Job** option.
5. Click the **Name** menu, then select **Search**.
6. Enter the following string in the **Name** text box, then click **Search**:

    ```
    Send Pending LDAP Requests
    ```
7. Click **Send Pending LDAP Requests**, then click **OK**.
8. Click **OK** on the**Schedule New Process** dialog box.

    The **Process Details** dialog box appears.
9. Click **Submit**.

A **Confirmation** dialog is displayed.

10. Click **OK**.

    Monitor the job. When it's complete, the newly imported self-service users are created in LDAP.

Removing Self-Service users through import

You can remove Self-Service users data using Self-Service Role import.

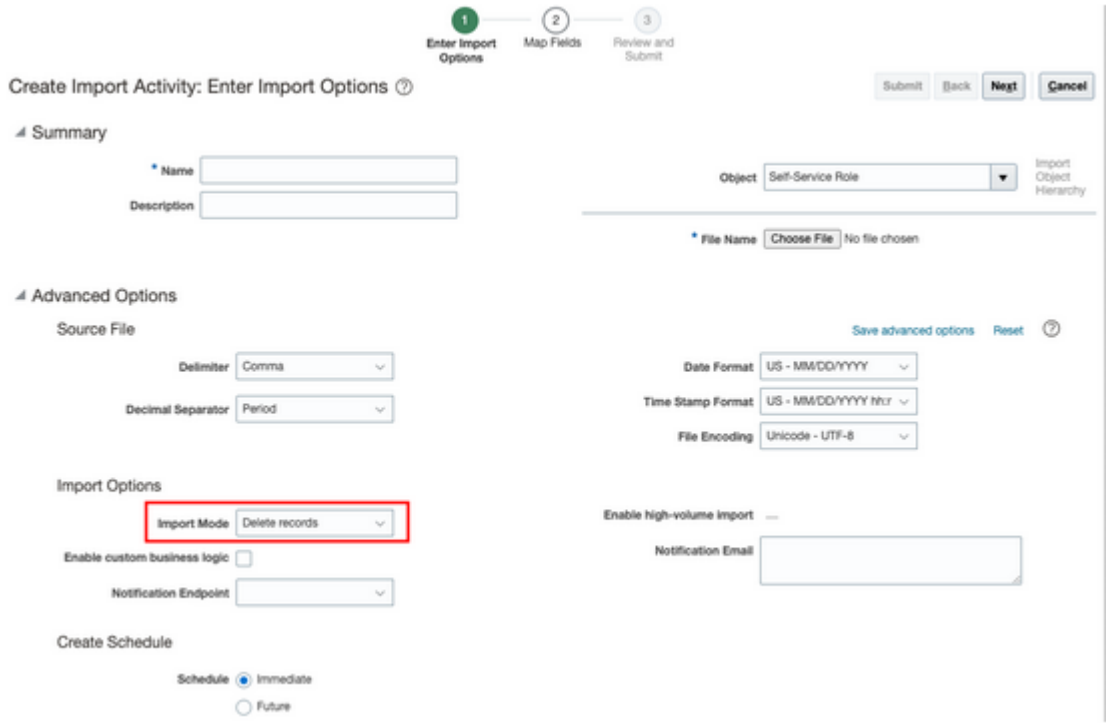
Removing Self-Service User data will not remove the following:

- Any contacts associated with the Self-Service user.
- The user account in the Identity Management System.

First you prepare the data file for the import process.

1. Get the role ID using the the **selfServiceUsers** REST API or **selfServiceRoles** REST API.

   To use to **selfServiceRoles** REST API to get the Role ID of the user you can query by **ContactPartyId** and **RelationshipTypeCd** set to ORA_CSS_USER.
2. When you start the import make sure the **Import Mode** is set to **Delete Records** as shown in the following example:



How do I use custom job roles in DCS?

You can create a custom job role for Customer Self-Service users. It lets you create a custom object and assign privileges to that object.

> **Note:** This step is optional for advanced setup of your application.

There are many reasons why you might create a custom job role for Customer Self-Service users. One possible reason is when you create a custom object and want to assign privileges to that object.

Follow these steps to assign custom job roles for use in Digital Customer Service:

1. Create a custom role by making a copy of one of the following predefined roles:
    - Customer Self-Service User
    - Customer Self-Service Account Administrator
2. Set the value of the appropriate Digital Customer Service profile option to the name of the custom role you created. The following profile options can be set to the name of the custom role:
    - `SVC_CSS_USER_ROLE_COMMON_NAME` If the value of this profile option is set to the name of a custom role, then all Customer Self-Service Users will be assigned this role when they're provisioned.
    - `SVC_CSS_ACCT_ADMIN_ROLE_COMMON_NAME` If the value of this profile option is set to the name of a custom role, then all self-service users who are assigned the Customer Self-Service Account Administrator role will receive this custom role.

    For more information about setting profile options, see *How do I set profile options for Self-Service Optimization?*.

    > **Note:** If you update these profile options to specify a custom role once your Digital Customer Service application is in use, you must perform a mass update of any existing users from the old roles to the new roles.

For each custom job role you create, you also must create a group in Identity Cloud Service. The external ID of the IDCS group you create must match the code of the Fusion Service custom job role that you created. For more information about creating IDCS groups, see *How do I set profile options for Self-Service Optimization?*.

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:
    - Offering: Service
    - Functional Area: Company Profile
    - 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:
    - Offering: Service
    - Functional Area: Business Units
    - 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 add Visual Builder roles?

You must add roles in Oracle Visual Builder and Oracle Visual Builder Studio to configure appropriate authorization for your Oracle Visual Builder platform and editor.

Instead of assigning roles to each user individually, you can simplify the process by creating groups and adding users to groups as a way to assign roles. Each time you add a user to a group, the user automatically gets the roles defined for the group. Or you can assign individual users to the Visual Builder roles.

Add Users to a Group

Add users to a group so that they automatically get the permissions defined for the group.

1. Sign in to Oracle Identity Cloud Service Console as an administrator.
2. From the Oracle Identity Cloud Service console, click the **Navigation menu** icon.
3. Click the **Groups** tab.
4. On the Groups page, click the group that you want to assign users to or add a new group.
5. On the Group Details page, select the **Users** tab.
6. Click **+ Assign**.
7. Select the users you want to add to the group, then click **OK**.

   The selected users are added to the group. You can now assign roles to all the users in the group, if required.

Assign Users or Groups to Roles in Visual Builder

After you create groups and add users to groups, you can assign roles and provide access to services and instances to all the members of the group at once.

Assign Roles to Users in Visual Builder

1. In Identity Cloud Service, click the **Navigation Drawer**, and select **Oracle Cloud Services**.
2. Select your Visual Builder instance.

   You can use the filter to help you find your instance. For Oracle Visual Builder Studio instances search for `visualbuilder`.
3. Click the **Application Roles** tab.
4. Click the menu options icon shown next to the role, and select **Assign Users**. To assign the role to a group, you need to select **Assign Groups**.
5. Assign the Oracle Visual Builder **Service Developer** role to the group or users that require Build and Maintain access in the Oracle Digital Customer Service applications.
6. Assign the Oracle Visual Builder **Service Administrator** role to the group or users that require Administrative access to configure instance-wide settings for the Oracle Visual Builder environment for all applications.

Assign Roles to Users in Visual Builder Studio

> **Note:** The following VB Studio steps apply only to one pod, typically your TEST instance. VBCS, however, is provisioned on all pods so those steps for the application roles are applicable to all instances.

1. Sign in to Identity Cloud Service, click the **Navigation Drawer**, and select **Oracle Cloud Services**.
2. From the Oracle Cloud console dashboard, navigate to the Identity Cloud console and click **Applications**.
3. Click the link for your Oracle Visual Builder Studio instance.

   You can use the filter to help you find your instance. For Oracle Visual Builder Studio instances search for your instance prefixed with "VBINST".
4. Click the **Application Roles** tab.
5. Click the menu options icon shown next to the role, and select **Assign Users**. To assign the role to a group, you need to select **Assign Groups**.
6. Select the checkbox next to the name of each user that you want to add to the role, and then click **Assign**.

   > **Note:** You must add the DEVELOPER_USER or the DEVELOPER_ADMINISTRATOR user roles.

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

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

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

Attribute Name for the SelfRegistration Object	Display Name	Attribute in the Contact Object	Type
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:
    - 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 set up vanity URLs?

The Vanity URL feature enables you to map a custom domain to your Oracle Visual Builder instance and Digital Customer Service Application.

This topic describes how to provide a replacement domain to use instead of the typical Oracle domain. The Vanity URL feature is distinct from domain forwarding, where the browser gets redirected. With the CNAME mapping described here, your users will never see the Oracle domain in their browser.

To successfully set up a vanity URL, follow the following three tasks in this topic:

1. Configure a Domain Provider
2. Log a Service Request for Oracle Support
3. Set Up the Root URL App

Prerequisites

Before following the steps in this task you must make sure you own the sub-domain that you want to use and have access to the SSL certificate bundle information.

> **Note:** If you have multiple Digital Customer Service applications you must perform these configuration steps on each one.

Configure the Domain Provider

The following instructions represent a generic overview for configuring a domain provider. The exact steps might be different, depending on your domain provider.

1. Create or identify a subdomain to map to Oracle Visual Builder via a domain provider. For example: `https://myvanity.example.org`.
2. Add a CNAME record for the subdomain to map to the Oracle Visual Builder instance URL. For example, create a CNAME record for `https://myvanity.example.org` that points to `myvbinstance.builder.ocp.oraclecloud.com`.
3. Ensure a valid SSL certificate applies to that subdomain, either through your domain provider or through a valid certifying authority. For example, `Comodo`, `DigiCert`, or other.

   > **Note:** Even though it's possible to use a wildcard SSL certificate (`*.example.org`), the certificate bundle needs to be maintained on the server. Because of this, you will want to consider an SSL certificate, specifically for that subdomain. The following example shows a wildcard certificate issued for the `*.example.org` domain.

4. Ensure that you have extracted or exported the bundle that contains the certificate and private key, because the certificate bundle will be managed on the server.

   > **Note:** Depending on your domain provider, you may need to indicate that you want to use the certificate on your own server in order to download the bundle.

   You should now have a certificate along with a private key file.

Log a Service Request for Oracle Support

Now, you need to log a Service Request (SR) with Oracle Support to request your Oracle Visual Builder instance to be configured with your vanity domain.

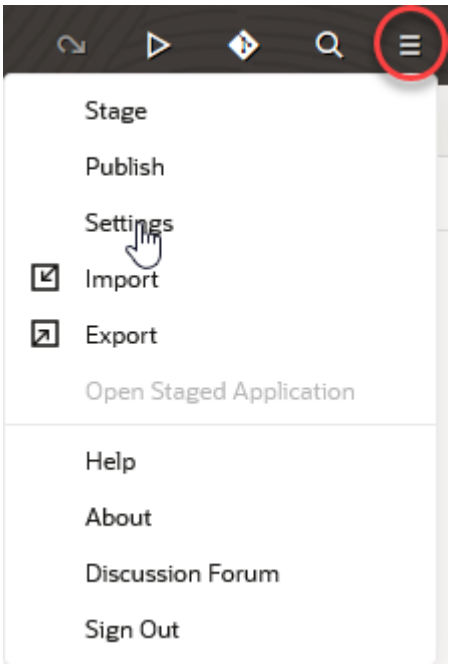
1. Navigate to the Oracle Support site.
2. Sign in using your user name and password.
3. Create an SR. Your SR must include the following information:
   - The full VB URL Designer URL. For example: `myvbinstance.builder.ocp.oraclecloud.com`.
   - This the CNAME as provided and the VB domain e.g. myvbinstance.builder.ocp.oraclecloud.com.
   - The Certificate and Private key files. For example, the keys ending in `.cer` and `.key`.

Set Up the Root URL App

Follow the steps in this task to configure the custom URL for your domain.

To map a custom domain to your application:

1. In Visual Builder, click the **Web Applications** tab, and then click **Menu** and select **Settings**, as shown in the following example:



2. In the Settings dialog box, enter the URL into the **Vanity URL** text field and click **Close**.
   The URL must be the full URL that you want to use and it must use valid form (for example, https://myvanity.example.org).

After you publish your DCS application, a visitor can type the custom domain (for example, https://foo.example.org) in the browser to open the web application. The URL won't contain any additional path parameters because the app is loaded as the root domain.

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.

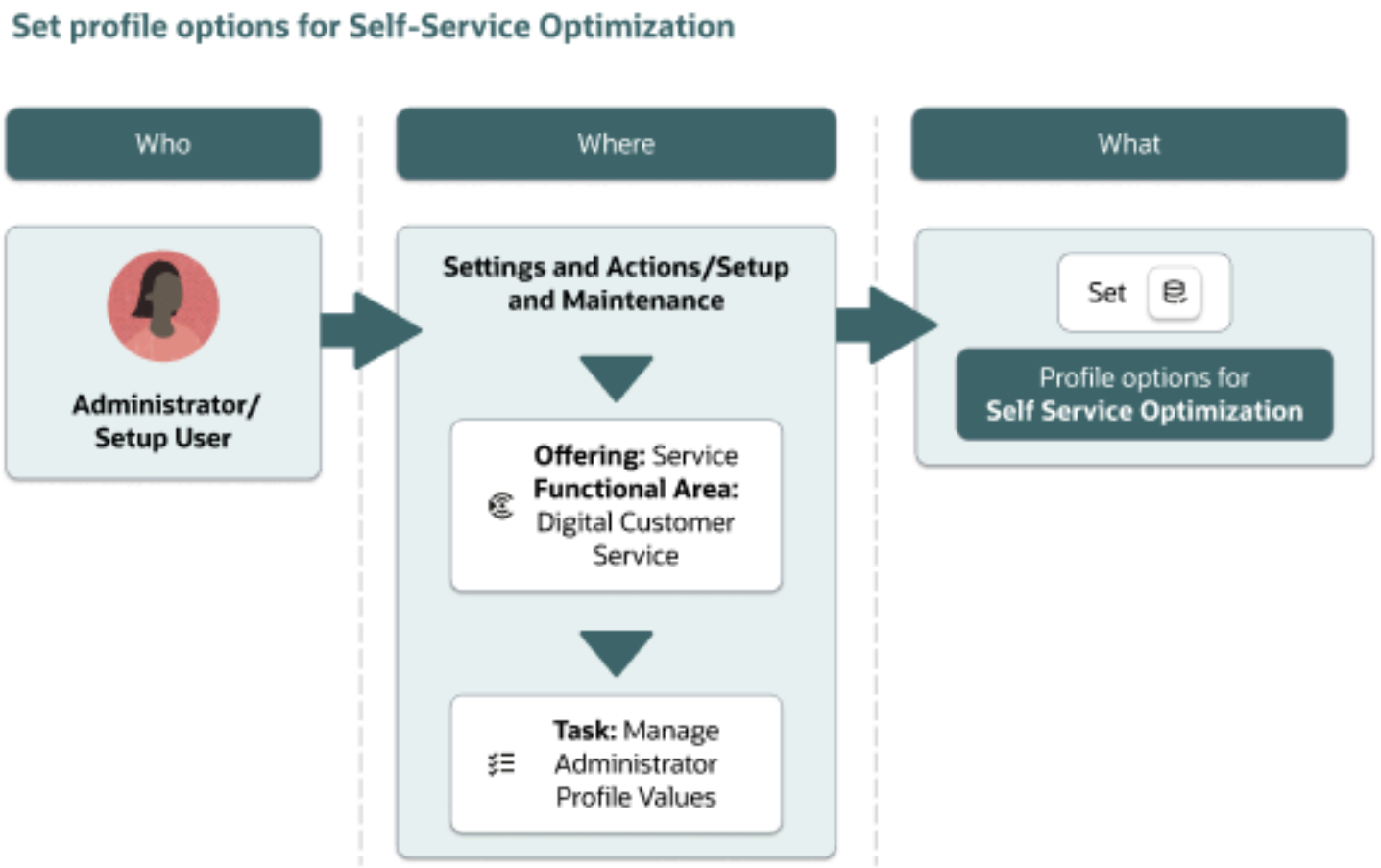
   You receive a Review Summary message when the order is successfully activated.
10. Click **Close** to complete the activation phase.

    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 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:
    - Offering: Service
    - Functional Area: Digital Customer Service
    - Task: Manage Digital Customer Service Profile Options

      or
    - 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. **Note:** 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	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

Profile Option	Default Value	Possible Values	Effect
			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.
SVC_CSS_ACCT_ADMIN_APPROVE	True	True False	Enables the approval of self-service user registration requests by users with Digital Customer Service Account Administrator roles. 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. If set to False, only Digital Customer Service Administrators can approve registration requests in the Digital Customer Service Administration user interface. **Note:** This option applies only when the SVC_ CSS_ SELF_ REG_ AUTO_APPROVE option is set to False.
SVC_CSS_ACCT_KEY_FIELD	OrganizationName	Any field in the Account object	Specifies a valid field name in the Account object. The field name is case sensitive. **Note:** 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.
SVC_CSS_REG_CONT_MAP	An empty string	An empty string. Any defined value, with a colon separating fields, and commas separating the pairs.	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

Profile Option	Default Value	Possible Values	Effect
		For example, reg_field1:contact_field1, reg_field2:contact_field2	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. So, let's take the custom attribute in the Self Registration object **`PlaceOfBirth_c`**. Because the Contact object has a ready to use attribute called **`PlaceOfBirth`**no mapping is required because 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`**. Here's an extra example with multiple mappings: 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: **`reg_field1:contact_field1,reg_field2:contact_field2`**. The **`reg_field1`** is the PlaceOfBirth_c in the Registration View Object which is 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`**
`SVC_CSS_SIGN_IN_ATTR_NAME`	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.
`SVC_CSS_REG_FLD_CONTACT`	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.

Profile Option	Default Value	Possible Values	Effect
			The SVC_CSS_REG_CONT_MAP profile option is used to find 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 extra 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 extra 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

Profile Option	Default Value	Possible Values	Effect
			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 set proxy user credentials in DCS?

Complete the configuration of the proxy user configuration data for the Self-Service Optimization feature, you need to set the user credentials for the proxy users.

1. Sign in to Fusion Service as an administrator or setup user.
2. In the Setup and Maintenance work area, go to the following:
    - Offering: Service.
    - Functional Area: Digital Customer Service.
    - Task: Manage Proxy User Configuration Data.

3. Find any line referencing the following proxy user keys:
    - PUK#_ANONYMOUS_USER
    - PUK#_SELF_SERVICE_USER
    - PUK#_SELF_SERVICE_ACCOUNT_ADMIN
4. Do the following with each of the three user keys:
    a. Select the entry, then from the **Actions** menu, click **Edit**.
    b. In the Edit Proxy User Configuration Data workspace, enter the Proxy User Name if it's different from the default name.

        Note: It's recommended that you retain the proxy user names.

    c. Enter the password for the proxy user.
    d. Click **Save and Close**.

Because the same proxy user key is used by multiple URLs, you can edit any one URL that uses this proxy user key to set the proxy user credentials associated with that key.

Note: Proxy user configuration data is cached for a duration specified by the SVC_CSS_PUDS_CACHE_DURATION profile option.

How do I configure the Resend Welcome and Password Recovery email templates?

As part of user registrations, a user is created in IDCS and initially the user record is inactive.

After all the data related to the user is stored in the appropriate locations, the user is activated again and an API call is made to resend the Welcome email. To prevent a user from receiving multiple emails and to ensure the user sees the appropriate welcome message you've two configuration tasks depending on the scenario.

- You use the Resend Welcome template when a new user has signed up.
- You use the Password Recovery template when the user has been migrated.

Here are both tasks:

Configure the Resend Welcome Template

1. Sign in to Identity Cloud Service as a user with Administrative access
2. From the Navigation drawer, select **Settings**, and then **Notifications**.
3. Click the **Configure** tab.
4. Deselect the **Welcome** and **User Activation** check boxes.
5. Make sure the **Resend Welcome** checkbox is selected.
6. Click **Save**, then when the confirmation dialog box appears click **OK**.
7. Click the **Email Templates** tab.
8. Expand the **Resend Welcome** template, and replace the existing Subject line and message text with you own information and click **Save**.

Configure the Password Recovery Template

1. Sign in to Identity Cloud Service as a user with Administrative access
2. From the Navigation drawer, select **Settings**, and then **Notifications**.
3. Click the **Configure** tab.
4. Deselect the **Welcome** and **User Activation** check boxes.
5. Make sure the **Password Recovery Request** checkbox is selected.
6. Click **Save**, then when the confirmation dialog box appears click **OK**.
7. Click the **Email Templates** tab.
8. Expand the **Password Recovery Request** template, and replace the existing Subject line and message text with you own information and click **Save**.

How do I set up Self-Service Registration without an account key requirement?

Administrators can enable this feature in the Setup and Maintenance work area. This feature is delivered enabled.

> **Note:** After enabling the self-service registration without an account key requirement, as specified in this section, the ODCS application developer specifies whether or not to require the account key by specifying the ODCS application-level variable userRegistrationType. The value **consumer** is used if you don't want to specify an account key. The default is **contact**, which requires an account key.

1. Sign in to Fusion Service as an administrator or 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. Locate the SVC_CSS_ALLOW_CONSUMER profile option and set it to **Yes**.
4. **Optional step**: Locate the SVC_CSS_CONSUMER_USER_CATEGORY and set it to the user category for consumers which defines the redirect URL for self-service users after a password reset.

   After these settings are enabled, the Account key field will no longer be required for self-service users to register in the ODCS application.

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 Digital Customer Service Developer roles?

To work with business objects relevant to Digital Customer Service, the developer must be a Digital Customer Service user and must be granted the appropriate roles. Here are thee tasks you'll need to perform:

1. Create an Internal Customer Account (This task only needs to be done once). *How do I create an Internal Customer account?*
2. Register the Developer as a Self-Service User. *How do I create an Internal Customer account?*
3. Add User Roles. *How do I add Visual Builder roles?*

How do I create a custom report based on a data model?

Now you can create a report based on the data model you have created.

1. Log in to Fusion Service as a user who can use Reports and Analytics.
2. Click **Navigator > Tools > Reports and Analytics**.
3. On the Reports and Analytics page, click **Create**, and then select **Report**.
4. Select Use Data Model, then click the search icon and locate the data model you previously created.
5. Click **Next**.
6. On the **Select Layout** page, choose the **Landscape** page option, and the **Table** layout option, and then click **Next**.
7. On the **Create Table** page, deselect **Show Grand Totals Row** and then click **Next**.
8. On the **Save Report** page, click **Customize Report Layout**.
9. Click **Finish**.
10. In the **Save As** dialog box, enter a name such as **Migration Report**, and then click **OK**.
11. Add a layout grid by doing the following:.
    a. In the report editor, click **Drop a Data Item Here**, and press the delete button on your keyboard.
    b. Click the **Insert** tab (if it's not already selected).
    c. Drag the **Layout Grid** from the Components list and drop it below the report title.
    d. In the Insert a Layout Grid dialog box, enter 1 in the Rows box, and leave the Columns box as 2, and then click **OK**.
    e. Click the **Insert** tab again, and from the Components list, drag a **Text Item** and drop it in the first column.
    f. Double-click the text item and enter the following: **Job started on or after**.
    g. From the **Data Source** pane, drag the **JOB_START_DATE** parameter to the second column.
    h. Reduce the width of the **Job started on or after** column.

12. Add a repeating section component by doing the following:
    a. Click the **Insert** tab, and then drag the **Repeating Section** component and drop it below the Layout Grid.
    b. In the **Insert a Repeating Section** dialog box, select **JOB ID** from the **Element** drop down list, and then click OK.
    c. Click the **Insert** tab, and drag a **Layout Grid** and drop it into the repeating section.
    d. Click the **Insert** tab, and drag a **Text Item** and drop it in the first column.
    e. Double-click the text item and enter the following: **Job ID**.
    f. From the **Data Source** pane, drag the **JOB_ID** parameter to the second column.
    g. Re-size the first column.
13. Now add a data table by doing the following:
    a. Click the **Insert** tab, and drag the **Data Table** component and drop it under the row in the repeating component,
    b. While the data table is selected, click the **Show** drop down list on the **Table** tab and select the first item that indicates no (darkened) summary row.
    c. From the Data Source pane, drag and drop the following fields into the data table:
        - Event ID
        - Contact Party ID
        - Login ID
        - Event Type
        - Event Status
        - Comments
14. Click the **Save** icon, and then click the **Done** button to access the report in View mode.
15. In the **Start Date** field, enter a job start date, and then click **Apply** to view the report.

How do I create an Internal Customer account?

Before creating the Digital Customer Service developer or administrator users, an internal customer account must be created for these users.

The internal customer account lets you associate your staff to a specific account. An account key is required when creating a new Digital Customer Service user.

> **Note:** You only need to create the internal customer account once. This internal customer account can be used by all Developers and Administrators.

To create an internal customer account:

1. Sign in to Oracle Fusion Service.
2. Navigate to the **Service** work area and click **Accounts**.
3. Click **Create Account**.
4. Enter the **Name**.

    > **Note:** The name that you enter in this field represents the **AccountKey** that you need to use in the Create Digital Customer Service Developers topic. This is true only if the value of the profile option SVC_CSS_ACCT_KEY_FIELD hasn't been changed.

5. Select **Customer** from the **Type** menu.
6. Click **Save and Close**.

How do I enable my own Forgotten Password page?

This topic is required to set up Identity Cloud Service to include the Digital Customer Service Reset Password page URL link when a user requests a password reset.

For this functionality to work Identity Cloud Service requires a REST request to be made to the `IDCS /Settings` API by a tenant administrator to set `allowedNotificationRedirectUrls` to include the Digital Customer Service Reset Password page URL. This setting defines the allowed notification redirect URLs which can be specified as the value of `notificationRedirectUrl` in the POST `.../admin/v1/MePasswordResetRequestor` request payload, which is then included in the reset password email notification sent to a user as part of the forgot password and password reset flow.

If you need to create the App in IDCS, see *Create a Client application*.

> **Note:** You must have Identity Administrator role and the Client ID and Client Secret must be for an IDCS application which has either the Identity Domain Administrator or Security Administrator application role granted. This is required to successfully call the `/Settings` REST API.

Use the following PowerShell script. If you're using a Mac or Linux computer, you'll need to install PowerShell first to run the script. See Microsoft's website for details. PowerShell is installed by default on Windows.

Save the following script in a file called `passwordreset.ps1` and change the `'...'` values in the script as appropriate for your environment.

- To run the script from a Command Prompt on Windows enter: `powershell -File passwordreset.ps1`
- To run the script on Mac or Linux enter: `pwsh passwordreset.ps1`

```
### MODIFY THE FOLLOWING VARIABLES FOR YOUR IDCS/ODCS ENVIRONMENT ###

# Set IDCS variables (modify for your IDCS instance)
$IdcsUrl = '...' # e.g. 'https://idcs-xxx.identity.yyy.idcs-example.com'
$ClientId = '...' # Client ID for privileged app in IDCS
$ClientSecret = '...' # Client Secret for privileged app in IDCS

# Either set the first 3 variables below for your ODCS app or explictly define $ForgotPasswordUrl
$OdcsHost = '...' # e.g. 'my-odcs-example.com'
$OdcsAppName = '...' # e.g. 'my_odcs_app'
$OdcsVersion = '...' # e.g. '1.1'
$ForgotPasswordUrl = "https://${OdcsHost}/ic/builder/rt/${OdcsAppName}/${OdcsVersion}/webApps/dcs/?
page=shell&shell=forgot-password"

### DO NOT MODIFY THIS SCRIPT BELOW THIS LINE ###

# Generate an access token
$Credentials = [Convert]::ToBase64String([System.Text.Encoding]::UTF8.GetBytes("${ClientId}:
${ClientSecret}"))
$Uri = "$IdcsUrl/oauth2/v1/token"
$Headers = @{
 Authorization = "Basic $Credentials"
}
$Parameters = @{
 grant_type = 'client_credentials'
 scope = 'urn:opc:idm:__myscopes__'
}
```

```
try {
 $Response = Invoke-RestMethod -Uri $Uri -Method POST -Headers $Headers -Body $Parameters
} catch {
 Write-Host ("Access token request POST to {0} failed with an error: {2}`nForm parameters: {1}`nException:
 {3}" -f $Uri, ($Parameters | Out-String), $_.ErrorDetails, $_.Exception) -fore red
 exit
}
$AccessToken = $Response.access_token

Write-Debug "Access Token = $AccessToken"

# Check the 'allowedNotificationRedirectUrls' IDCS Setting value
$Uri = "$IdcsUrl/admin/v1/Settings/Settings/?attributes=allowedNotificationRedirectUrls"
$Headers = @{
 Authorization = "Bearer $AccessToken"
 'Content-Type' = 'application/scim+json'
}
try {
 $Response = Invoke-RestMethod -Uri $Uri -Method GET -Headers $Headers
} catch {
 Write-Host ("Request to GET {0} failed with an error: {1}. `nException: {2}" -f $Uri, $_.ErrorDetails,
 $_.Exception) -fore red
 exit
}
$AllowedUrls = $Response.allowedNotificationRedirectUrls

Write-Debug "Allowed URLs from GET /admin/v1/Settings/Settings = $AllowedUrls"

# Add the forgot password URL to the Settings, if required (i.e. not already in $AllowedUrls)
if ($null -ne $AllowedUrls -And $AllowedUrls.Contains($ForgotPasswordUrl)) {
 Write-Output "URL ($ForgotPasswordUrl) is already registered"
} else {
 # Remove query parameter from /Settings URL, headers remain as for previous request
 $Uri = "$IdcsUrl/admin/v1/Settings/Settings/"

 # Add new URL and format the list for inclusion in the JSON payload (without powershell encoding)
 $AllowedUrls += $ForgotPasswordUrl;
 $AllowedUrls = '"{0}"' -f ($AllowedUrls -join '","')
 $Body = '{
 "schemas": [
 "urn:ietf:params:scim:api:messages:2.0:PatchOp"
 ],
 "Operations": [
 {
 "op": "replace",
 "path": "allowedNotificationRedirectUrls",
 "value": [' + $AllowedUrls + ']
 }
 ]
 }'

 try {
 $Response = Invoke-RestMethod -Uri $Uri -Method PATCH -Headers $Headers -Body $Body
 } catch {
 Write-Host ("Request to PUT {0} to {1} failed with an error: {2}. `nException:{3}" -f $Body, $Uri,
 $_.ErrorDetails, $_.Exception) -fore red
 exit
 }

 $AllowedUrls = $Response.allowedNotificationRedirectUrls
 Write-Output "Added new URL: $ForgotPasswordUrl"
}

Write-Output "`nAllowed Notification Redirect URLs:"
Write-Output $AllowedUrls
```

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. **Note:** Self-Service users can only reschedule Oracle Field Service work orders, not generic work orders.

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.

Search Result	Action
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 configure Installed Base Assets?

Here's the configuration steps you must perform to make Fusion products manageable as Installed Base Assets.

The Digital Customer Service product picker, by default, shows all products flagged as Enabled for Customer Self Service. You must set an additional property in Fusion Service to enable a product to be managed as an Installed Base Asset.

1. Sign in to Fusion Service as an administrator or setup user.
2. From the home page, select **Product Management,** then click the **Product Information Management** tile.
3. Click the **Tasks** drawer icon, and then click the **Manage Items** link.

   The Manage Items form appears.
4. Perform a search for your product, then, in the search results, select the link for the product.
5. In the product detail page, select the **Specifications** tab, then from the **Item Organization** list, select **Service**.
6. Update the products to make them manageable as Installed Base Assets, locate the **Assets** area of the view, and do one of the following:

   a. Click the Enable Asset Tracking drop down list and select: **Full Lifecycle**.
   b. Or, click the **Enable Asset Maintenance** drop down list, and select **Yes**.

How do I enable automatic Sign in for authenticated Identity Cloud Service users?

You can configure your custom sign-in page in the Digital Customer Service application to automatically log in users who are already authenticated through Identity Cloud Service.

Users can be authenticated either directly through the IDCS administration console, or through another application that uses the same IDCS instance as the Digital Customer Service application. This functionality is disabled by default, but can be enabled by setting the **enableAutoLogin** constant in the new **LoginAuthenticatedIdcsUser** application level action chain to **true**.

Here's how you do it:

1. In Visual Builder, click your application icon in the Web Apps navigator.
2. Click the **Actions** tab.
3. In the list of Actions, locate and select the **LoginAuthenticatedIdcsUser** action.
4. Set the default value of the **enableAutoLogin** constant to **true**.

What are the Installed Base Asset components?

If you're an Oracle Cloud customer that uses Installed Base Assets for processes such as Supply Chain, Service Logistics, Service Contracts, or IOT, you can opt-in to use the same asset model for your service request and work order processes.

Your users can register products as installed base assets using the asset-register flow in the Digital Customer Service reference implementation. Users access the flow by clicking the Register Product button on the Registered Products view. You can only register products that have been configured to allow tracking as assets.

> **Note:** Assets and product registrations are Oracle Fusion Installed Base Assets.

Account managers can view and manage all assets associated with the account that they manage. Non-account manager users can only access and manage assets that they have registered themselves.

Users can do the following with registered products:

- View a list of product assets
- Register a product asset
- View the details of a product asset
- Update the product asset description
- See knowledge articles associated with a product asset
- See service requests logged against a product asset
- Create a new service request against a product asset from the product asset details page

Users access the list of registered products by clicking the Settings and Actions menu, and selecting the **Registered Products** option from the drop-down list.

The following table describes components specific to asset registration.

Component Name	Description
Asset List	Lists the Installed Base Assets of Digital Customer Service self-service users. Users can register products as installed base assets using the asset-register flow in the Digital Customer Service Reference Implementation, by clicking the Register Product button on the Registered Products flow. Only products that have been configured to be tracked as assets can be registered.
Asset Register	Enables a self-service user to register an Installed Base Asset in the Digital Customer Service application.
Asset Detail	Enables a self-service user to view details and update the description of the registration of an Installed Base Asset in the Digital Customer Service application.

How Digital Customer Service User Roles are Used by the Installed Base Asset Components

Your users can register products as installed base assets using the asset-register flow in the Digital Customer Service reference implementation. Users access the flow by clicking the Register Product button on the Registered Products view. You can only register products that have been configured to allow tracking as assets.

Here's a list of the roles required for registering products and what each role can do:

Role	Definition
Account Manager	Can view and manage all assets associated with the account being managed.
Non-Account Manager User	Can only access and manage assets that they have registered.
B2C User	Can register and manage assets.

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 now.
4. Click **Create Account** to proceed to submit your request.
5. Click **Close**.

   The account is now active and ready to use.