

B2C Service

Using Configuration Assistant

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Preface

This preface introduces information sources that can help you use the application and this guide.

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1 Getting Started

Overview of the B2C Service Configuration Assistant

The Oracle B2C Service Configuration Assistant is a self-service tool that lets you manage your B2C Service sites using Oracle Cloud.

For example, you can create a B2C Service or an Intelligent Advisor site and integrate Oracle products and services such as B2C Chat, Video Chat, or Oracle Live Experience Cloud.

Note: You also can manage certain aspects of your Intelligent Advisor site interfaces. Although you cannot add new interface sites, you can make changes to the URL and time-zone values of an existing interface.

When you purchase a Configuration Assistant subscription, you'll receive two welcome emails from Oracle Cloud: one containing the login credentials for Oracle Cloud Applications Console, and another with access instructions. For your convenience, however, you can find those instructions in *Access the Configuration Assistant*.

You can find the link to the Configuration Assistant main page on the Oracle Cloud Applications Console. The B2C Service products or services that display on the main page depend on those you've purchased.

Common Configuration Assistant activities include:

- Creating and managing sites, test sites, and mailboxes
- Enabling integrations and product add-ons
- Managing SSL certificates
- Monitoring data usage and statistics

Access the Configuration Assistant

Use these steps to access the Configuration Assistant tool, which you can find in the Oracle Cloud Portal.

To access the Configuration Assistant self-service tool, you will need the following information from your Welcome Email:

- Data center
- Identity Domain
- User name/login
- Temporary Password

1. Open your web browser and go to **<https://cloud.oracle.com/sign-in>**.
2. Click **Next**.
3. Enter the **Identity Domain**.

4. Log in with the Oracle Cloud Portal user name and password.

Note: If this is your first time logging in, set up your challenge/security questions when prompted and retain them for future use.

5. Click **RNOW** in the list of Active Applications.
6. Click **Configuration Assistant** on top right of the page.
7. Log in using the same user name, password, and identity domain.

2 Configuration Assistant Main Page

Overview of the Main Page

The Configuration Assistant main page displays summary information about B2C Service and Intelligent Advisor production and test sites.

Location	Description
Tabs	<ul style="list-style-type: none">• Sites <p>Note: This is the default view.</p> <ul style="list-style-type: none">• Co-browse/Video Chat• SSL Certificates• Statistics• Notifications
Site overview	Displays general information about B2C Service and Intelligent Advisor sites, including the total number available. <ul style="list-style-type: none">• Service<ul style="list-style-type: none">○ Service Sites○ Service Test Sites○ Interfaces○ Mailboxes• Intelligent Advisor<ul style="list-style-type: none">○ Production Sites○ Test Sites
Sites	Displays all existing B2C Service and Intelligent Advisor production and test sites.

3 Site Operations

Overview of Site Operations

Every site on the Sites page has a corresponding drop-down list with options that allow you easy access to the most common site-related tasks.

Note: You also can perform these tasks from the Site Details page.

Task	Description
View Site Details	Select this option to display the Site Details page. Available for all sites.
Manage My Update	Select this option to view update information, manage update preferences, and access update documentation. Available for B2C Service sites.
Create Test Site	Select this option to create a new test site with a new name. Available for B2C Service and Intelligent Advisor sites.
Create and Update Test Site	Select this option to create a new test site, and then update it to the latest release available. Note: The option is available only if create/update is allowed for a site. Available for B2C Service and Intelligent Advisor sites.
Enable Chat	Select this option to enable chat. Available for B2C Service sites and test sites.
Reset Admin Password	Select this option to reset the administrator password. Available for all sites.
Enable B2C Service Modules	Select this option to enable B2C Service modules. Available for B2C Service sites and test sites.
Re-Create Test Site	Select this option to destroy an existing test site and clone your production site to create a new test site. Note: This action will delete your entire project repository and its history. Available for B2C Service and Intelligent Advisor test sites.
Re-Create and Update Test Site	Select this option to destroy an existing test site, clone your production site to create a new test site, and then update it to the latest release available.

Task	Description
	<p>Note: This action will delete your entire project repository and its history.</p> <p>Available for B2C Service and Intelligent Advisor test sites.</p>
Enable Utilities	<p>Select this option to enable a site's utilities.</p> <p>Available for B2C Service test sites.</p>
Update Test Site	<p>Select this option to update a test site.</p> <p>Available for Intelligent Advisor test sites.</p>

If any of these options is grayed out, hovering your mouse over the option will display the reason. Reasons can be any of these:

- The test site is already on the latest version.
- The site's upgrade is in progress.
- The production site is not active.
- The site is scheduled for transport.

Site Details

Detailed information about a site displays when you select it on the Sites page.

Detail	Description
Instance Overview	<p>Clicking this tile displays high-level information about the site.</p> <ul style="list-style-type: none"> • Service status • Number of existing interfaces • Number of existing mailboxes • Number of existing test sites <p>Note: This is the default view.</p>
Site Details	<p>Displays additional information about the site.</p> <ul style="list-style-type: none"> • Version • Creation Date • Subscription Id • Current Patch
Interfaces	<p>Clicking this tile displays information about any interfaces associated with the site.</p> <ul style="list-style-type: none"> • Interface Name • Language • Customer Portal URL

Detail	Description
	<ul style="list-style-type: none">• Agent Desktop URL <p>From here, you can create new interfaces or refresh the current page. The two drop-down lists on the page allow you to select and perform site-related tasks, or tasks that are specific to an interface.</p>
Mailboxes	<p>Clicking this tile displays information about any mailboxes associated with the site.</p> <ul style="list-style-type: none">• Mailbox Name• Status (enabled or disabled)• Mailbox Type• Interface Name <p>From here, you can create new mailboxes or refresh the current page. The two drop-down lists on the page allow you to select and perform site-related tasks, or tasks that are specific to a mailbox.</p>
Service Integrations	<p>Clicking this tile displays the list of service integrations available for your site. They can include:</p> <ul style="list-style-type: none">• Smart Interaction Hub (SIH)• Intelligent Advisor• Browser User Interface (BUI) <p>Note: The Agent Browser UI is enabled automatically when you create a B2C Service site.</p> <ul style="list-style-type: none">• Live Experience (LX) <p>Note: If available for your site, Knowledge Advanced (KA) will be enabled by default.</p>

4 Initial Site Provisioning

Site Management

Create a Site

You can create a B2C Service production site from the Configuration Assistant main page.

1. From the Configuration Assistant main page, click **Create Site**.
2. In the Create Site window, select the desired version from the **Product** drop-down list.
3. Enter a name for your site.
A URL, based on the site name and the default domain, is automatically generated. You can edit the site name in the URL, but you cannot modify the default domain.
4. Select your preferred language.
Note: Once selected, you cannot change this option.
5. Select the preferred time zone for the site.
6. Click **Create**.

Refresh the Configuration Assistant main page after about 60 minutes to verify that the site has been created.

Reset the System Administrator Password

All production and test sites have a system-defined administrator account.

By default, the system administrator is granted all available permissions. The system administrator uses the “administrator” login on B2C Service sites, and the “admin” login on Intelligent Advisor sites.

1. From the Configuration Assistant main page, find the B2C Service or Intelligent Advisor site for which you want to reset the system administrator password.
2. Click the **Site Operations** icon, represented by four horizontal lines, and select **Reset Admin Password**.
3. Click **Yes** to confirm the password reset.
A message displays, telling you that the system administrator password has been reset, and that an email containing the new password has been sent.
4. Click **OK**.

Interface Management

Add or Edit a B2C Service Interface

You can add a new interface to a B2C Service site or edit an existing one.

Adding an interface to a B2C Service site creates both a customer portal and an Agent Browser User Interface (Agent Browser UI) for your site. Customers can use your customer portal to access a variety of self-help tools. In addition to

the Service Console, the Agent Browser UI gives you one more way to view and manage your B2C Service data. When created, you can edit the interface URL and, if your subscription allows it, interface features.

1. From the Configuration Assistant main page, click the B2C Service site to which you want to add an interface.
2. On the Site Details page, click the **Interfaces** tile.
3. To create a new interface:
 - a. Click **Create Interface**.
 - b. In the Create Interface window, enter field information:

Field	Description
Interface name	Enter the name of the interface. This field accepts alphanumeric characters but cannot contain spaces. The name also cannot start or end with an underscore.
URL	Enter the URL of the virtual host (vhost) for your site.
Language	Scroll to select a language for the interface.
Timezone	Scroll to select a time zone for the interface.
Look and Feel From	Select a formatting style for the user interface. Note: The default look and feel will copy the look and feel from the primary interface.

- c. Click **Create**.
A message confirms that your request to add an interface has been submitted.
- d. Click **OK**.
The new interface appears in the interface list. However, the navigation and menu controls are disabled until the creation process completes.

When the process completes, you might need to refresh the page to update the list of interfaces.

4. To edit an existing interface:
 - a. Repeat Steps 1 and 2.
 - b. In the listing for the interface you want to edit, click the **Interface Operations** icon, represented by four horizontal lines, and select **Edit**.
 - c. If desired, edit the interface URL.
Note: You cannot edit the interface name, language, or time zone.
 - d. Enable or disable any of your interface features.
Note: Interface features will be grayed out if your subscription doesn't include them.
 - e. Click **Save**

Manage Security Headers

Implementing security headers helps to protect your customer portal from the types of attacks that it is most likely to experience.

1. From the Configuration Assistant main page, click the site for which you want to manage security headers.
2. Click the **Interfaces** tile.
3. Find the interface whose security headers you want to manage.
4. Click the **Site Operations** icon, represented by four horizontal lines, and select **Manage Security Headers** from the drop-down list.
5. Enable or disable these options:
 - o X-Frame-Options
Protects against clickjacking attacks by preventing other sites from embedding your content.
 - o X-XSS-Protection
Protects against cross-site-scripting attacks by preventing a web page from opening when it detects an attack.
 - o X-Content-Type-Options
Protects against MIME sniffing by telling the browser to follow only the MIME types indicated in the header.
6. Click **Submit**.
7. Click **Yes** to confirm, and then click **OK**.

Click **Notifications** to monitor the status of the change.

Mailbox Management

Overview of Mailboxes

You can set up multiple Service and Outreach mailboxes on each B2C Service interface.

Note: To ensure accurate processing of replies, inbound messages, and bounces, you must set up at least one Service mailbox.

After you create a mailbox, you can disable it or delete it. However, you must use the Agent Browser User Interface (Agent Browser UI) or B2C Service Console to configure these additional options:

- Brand your mailbox to match your organization's brand identity.
- Define the bounce address to use as the return path for bounced emails.
- Define the sender name you want to display on outgoing messages.

For more information, see [How Mailboxes Work](#).

Add a Mailbox

You can add an Oracle-managed Service or Outreach mailbox to any B2C Service site.

Configure additional Service and Outreach options on the B2C Service Console, or on your site's Agent Browser User Interface.

1. From the Configuration Assistant main page, click the Service site to which you want to add a mailbox.
2. Click the **Mailboxes** tile, and then click **Create Mailbox**.
3. Enter field information:

Field	Description
Mailbox Name	Enter a name for the mailbox. <ul style="list-style-type: none">○ Must not exceed 80 characters.○ Must not start with a number.○ Includes only lowercase letters, numbers, underscores, periods, and dashes.○ Contains no spaces or consecutive underscores.
Mailbox Type	Service Mailboxes process email communications on incidents. Outreach Mailboxes send outreach email communications, such as surveys and mailings. Note: Outreach mailboxes need further manual configuration. See View details to configure outreach mailbox section for details.
Enabled	This read-only field is enabled by default. Note: You can disable this field in the View and Edit Details window.
Interface	Select the interface with which you want to associate the mailbox.

4. Click **Create**.

You will receive an email containing your new mailbox password.

You might need to click **Refresh** to display the new mailbox on the page.

View Mailbox Details

After you create a new Service or Outreach mailbox, you can view its details.

1. From the Mailboxes page, click the **Mailbox Operations** icon associated with the mailbox, and select **View Details and Edit**.

Note: For Outreach mailboxes, clicking the additional View Details option displays information that you can use when configuring the mailbox.

2. Make a note of the details and click **OK**.

Make all mailbox-configuration changes on the Agent Browser UI or B2C Service Console. See *Edit an Oracle-Managed Service Mailbox*.

Enable or Disable a Mailbox

Use these steps to enable or disable an existing mailbox.

1. From the Mailboxes page, click the **Mailbox Operations** icon associated with the mailbox, and select **View Details and Edit**.
2. To disable a mailbox, deselect the **Enabled** check box.

Note: If you disable a mailbox, email sent to the address associated with the mailbox is not delivered, but continues to accumulate.

3. To enable a mailbox, select the **Enabled** check box.

Note: When you enable a mailbox, all emails that accumulated while this mailbox was disabled are delivered.

4. Click **Save**, and then click **OK**.

Make all other mailbox-configuration changes on the Agent Browser UI or B2C Service Console. See *Edit an Oracle-Managed Service Mailbox*.

Delete a Mailbox

Deleting a mailbox is a permanent action.

If you delete a mailbox that is associated with an email address your customers use, any email sent to that address will be rejected and you will not receive it.

1. On the Configuration Assistant main page, click the Service site whose mailbox you want to delete.
2. On the Site Details page, click the **Mailboxes** tile.
3. Click the **Mailbox Operations** icon associated with the mailbox, and select **Delete**.
4. Click **Delete** to confirm the mailbox deletion.

Click **Refresh** to ensure that the mailbox no longer displays in the list.

Reset a Mailbox Password

Use these steps to change a mailbox's system-generated default password.

1. On the Configuration Assistant main page, click the Service site whose mailbox password you want to change.
2. On the Site Details page, click the **Mailboxes** tile.
3. Click the **Mailbox Operations** icon associated with the mailbox, and select **Reset Password**.
4. Click **Yes** to confirm the password reset.

5 Feature Provisioning

Overview of Feature Provisioning

The B2C Service Configuration core product includes the Agent Browser User Interface and Oracle Knowledge Advanced. Other integrations and add-ons are available for purchase.

You can integrate these systems with Configuration Assistant:

- Smart Interaction Hub
- Intelligent Advisor
- Live Experience

These add-ons are available:

- Chat
- Co-browse
- B2C Service Modules

Chat

Enable Chat

You can enable Chat for a B2C Service site from the Site Operations drop-down list on any of the site's pages.

In this procedure, you are enabling Chat from the Configuration Assistant main page.

1. On the main page, find the B2C Service site for which you want to enable Chat.
2. Click the **Site Operations** icon, represented by four horizontal lines, and select **Enable Chat** from the drop-down list.
3. Click **Yes**, and then click **OK** in the confirmation window.

Note: When you enable Chat for a B2C Service site, you also enable it for all interfaces associated with that site.

Refresh the Configuration Assistant main page after about 60 minutes to verify that Chat is enabled for the site.

B2C Service Modules

Enable Modules from the Main Page

After you purchase and add B2C Service modules to your subscription, you can enable them on any interface.

In this procedure, you are enabling B2C Service modules from the Configuration Assistant main page.

B2C Service modules include:

- B2C Service Connect - Includes Connect Web Services, which is a backward-compatible, public API that enables customers and partners to integrate with the Oracle B2C Service platform using industry leading standards such as WSDL 1.1 and SOAP 1.1.
 - Desktop Workflow - Supports the creation and editing of individual incidents, contacts, organizations, tasks, answers, opportunities, quotes, and quote products.
 - Guided Assistance - Gives agents and customers the ability to find answers or text explanations by selecting responses from question branches in guides.
 - Agent Scripting - Adds functionality to workspaces and workflows, leading staff members through a series of pages to help them enter information in a logical progression.
 - Outlook Integration - Syncs Outlook email to create or update contacts or incidents in B2C Service, even if no associated email exists in the B2C Service database at the time of synchronization.
 - Sitemap - Lets you inform search engines about all the answer links that are available on your site, including those that are not accessible through links.
1. On the main page, find the B2C Service site for which you want to enable B2C Service modules.
 2. Click the **Site Operations** icon, represented by four horizontal lines, and select **Enable B2C Service Modules** from the drop-down list.
 3. Click **Yes**, and then click **OK** in the confirmation window.

Co-browse/Video Chat

Overview of Co-browse/Video Chat Instances

There are several different ways to create a Co-browse/Video Chat instance.

You can create a Co-browse/Video Chat instance only if it's included in your subscription. Otherwise, the option to create one is unavailable. Co-browse and Video Chat also are known as channels.

Note: Configuration Assistant allows you to create only one instance of Co-browse.

Co-browse and Video Chat are referred to separately as channels.

Instance	Description
Standalone Co-browse instance	Select the Co-browse channel without selecting a B2C Service site to create a standalone Co-browse instance. You can't add Video Chat or integrated Co-browse channels to a standalone instance, and the options to do so are unavailable.
Integrated B2C Service instance	Select the Co-browse channel and an integrated instance. You can add a Video Chat channel to an integrated instance at any time.
Video Chat instance	A Video Chat instance always integrates with a B2C Service site. You can add a Co-browse channel to an integrated Video Chat instance at any time, however you cannot add a standalone Co-browse instance.

Instance	Description
Co-browse and Video Chat instance	This instance is integrated with a B2C Service site, and includes both Co-browse and Video Chat channels.

Create a Co-browse/Video Chat Instance

You can create either a standalone or integrated Co-browse instance.

1. From the Configuration Assistant main page, click **Co-browse/Video Chat**.
2. Click **Create Instance**.
3. If you want to, enter your company's URL.
4. Specify an instance type:
 - o To create a standalone instance, do not select a B2C Service site from the drop-down list, and then skip to Step 6.
 - o To create an integrated instance, select a B2C Service site from the drop-down list. The Subscription field displays.
5. Select a subscription from the drop-down list.
6. Select **Co-browse**.

Note: If you're creating an integrated instance, you also have the option to select Video Chat. You can add this channel at any time if you choose not to do so now.

7. Click **Create**.
8. Click **OK**.

Refresh the Co-browse and Video Chat Cloud Service Instances page after about 30 minutes to verify that a Co-browse instance has been created.

After you create the Co-browse instance, you must reset the administrator password to access it.

Reset the Co-browse Password

You can access a newly created Co-browse instance by resetting the password.

1. After the newly created Co-browse instance displays on the Co-browse and Video Chat Cloud Service Instances page, click the **Admin Password Reset URL** link.
2. On the page that displays, enter your email address and the verification code, and then click **Submit**.
You'll receive an email with a link to reset your password.
3. Follow the instructions in the email to complete the reset process.

Add Channels

Add Video Chat to a Co-browse Instance

You can add a Video Chat channel to an existing Co-browse instance.

1. Click **Co-browse/Video Chat** from anywhere in Configuration Assistance to display the Co-browse and Video Chat Cloud Service Instances page.

2. In the instance listing, click the **Instance Operations** icon, represented by four horizontal lines, and then select **Add Channel** from the drop-down list.
3. Select **Video Chat** and click **Add Channel**.
Note: Co-browse is selected by default and can't be changed.
4. Select one of these options.
 - o 2-way — enables Video Chat for both the agent and the visitor
 - o 1-way from Agent — enables Video Chat for the agent only, and is the default option
 - o 1-way from Visitor — specifies that only the visitor can initiate the Video Chat
 - o audio only — specifies that the chat is audio only
5. Click **Add Channel**, and then click **OK** to close the confirmation window.

Add Co-browse to a Video Chat Instance

You can add a Co-browse channel to an existing Video Chat instance.

1. Click **Co-browse/Video Chat** from anywhere in Configuration Assistance to display the Co-browse and Video Chat Cloud Service Instances page.
2. In the instance listing, click the **Instance Operations** icon, represented by four horizontal lines, and then select **Add Channel** from the drop-down list.
3. Select **Co-browse** and click **Add Channel**.
Note: Video Chat is selected by default and can't be changed.
4. Click **Add Channel**, and then click **OK** to close the confirmation window.

Oracle Intelligent Advisor

Overview of Intelligent Advisor

Intelligent Advisor is a decision-automation solution that helps service agents deliver the right advice to every customer.

New customers with a non-B2C Service Intelligent Advisor subscription must log in as a user with the CXOPA administrative role to administer their Intelligent Advisor sites. However, if your subscription includes B2C Service and Intelligent Advisor subscriptions, then you can use the same Configuration Assistant administrator login credentials to manage both subscriptions.

Create an Intelligent Advisor Site

You can create a new Intelligent Advisor production site from the Configuration Assistant main page.

1. From the Configuration Assistant main page, click **Create Site**.
2. Select **Intelligent Advisor** from the product list.

3. Enter the name for your Intelligent Advisor site.

Note: The site URL is generated automatically based on the site name and the default domain. You may edit the site name in the URL if required; however, you can't modify the default domain.

4. Select the subscription for which you want to create the site.

5. Click **Create**.

6. Click **OK** to close the confirmation window.

The new Intelligent Advisor site displays on the main page, but the navigation and menu controls are disabled until the creation process finishes.

Refresh the Configuration Assistant main page after about 60 minutes to verify that the site has been created.

6 Product Add-Ons and Cloud Integrations

Overview of Add-Ons and Integrations

If your organization has purchased them, you can enable certain product add-ons and integrations.

You can enable these add-ons:

- Smart Interaction Hub (SIH)
- Live Experience (LX)

You also can integrate your Intelligent Advisor instance with a B2C Service site.

Note: The Agent Browser User Interface (BUI) integrates automatically with the majority of sites. For sites created with older versions of Configuration Assistant, you must enable it manually.

Enable Smart Interaction Hub

You can enable any Oracle Cloud applications or B2C Service integrations and product add-ons that your organization has purchased.

To enable Smart Interaction Hub, follow these steps:

1. From the Configuration Assistant main page, click the Service site for which you want to enable an integration or product add-on.
2. From the Site Details page, click **Integrations** tile.

The Service Integrations page opens listing all the integrations and product add-ons your organization has purchased.

3. Click the **Enable** button next to Smart Interaction Hub (SIH).
4. Click **Yes** to confirm the enablement.

The enablement process can take several minutes to complete.

If successful, the Smart Interaction Hub's Enable button no longer displays.

Click **Refresh Page** to verify the enablement, and to update the list of enabled integrations and product add-ons that displays on the page.

Integrate Intelligent Advisor with a B2C Service Site

You can integrate your Intelligent Advisor instance with a B2C Service site.

1. From the Configuration Assistant main page, click the Service site with which you want to integrate Intelligent Advisor.

2. Click the **Integrations** tile.
3. On the Service Integrations page, click **Enable Intelligent Advisor** .
4. In the Service and Intelligent Advisor Integration window, select an Intelligent Advisor site from the drop-down list.
5. Click **Yes** to confirm the integration.
6. Click **OK** to close the confirmation window.

The enablement process can take several minutes to complete. If successful, the Enable Intelligent Advisor button no longer displays.

Click **Refresh Page** to verify the integration, and to update the list of enabled integrations and product add-ons that displays on the page.

Enable the Live Experience (LX) Interface

You can enable any Oracle Cloud applications or B2C Service integrations and product add-ons that your organization has purchased.

To enable Live Experience, follow these steps:

1. From the Configuration Assistant main page, click the Service site for which you want to enable an integration or product add-on.
2. From the Site Details page, click **Integrations** tile.

The Service Integrations page opens listing all the integrations and product add-ons your organization has purchased.

3. Click **Enable** Live Experience (LX).
4. Click **Yes** to confirm the enablement.

The enablement process can take several minutes to complete.

If successful, the Live Experience Enable button no longer displays.

5. Click **Refresh Page** to verify the enablement, and to update the list of enabled integrations and product add-ons that displays on the page.

On the Site Details page, click **Download Zip** to download the required configuration files, and follow the instructions included in the confirmation email you receive after enablement. For more information, see the *Enable Live Experience as a Pre-Configured Add-In in Service Cloud*.

7 Site Maintenance

Test Sites

B2C Service

Create a Test Site

A B2C Service test site is a clone your production site.

1. On the main page, find the B2C Service site for which you want to create a test site.
2. Click the **Site Operations** icon, and select **Create Test Site** from the drop-down list.
3. In the Create Test Site window, click the **Select Date and Time** calendar icon to schedule the start of the test-site creation operation.

Note: If you do not specify a date and time, the process will begin in a short time.

4. Select one of the following clone types to create a test site:
 - o Full Clone — Clones a full copy of the production site into a test site.
 - o Sparse Clone — Clones the production configuration, customization, and last thousand incidents into a test site.
 - o Discreet Clone — Clones only the production configuration and customization into a test site. Custom Objects will also be included. Does not include the incidents or contacts tables.
5. Click **Create**, and then click **Yes** to close the confirmation window.
6. Click **OK** to close the Information window.

Note:

- Check the **Notifications** tab frequently to check the progress of the operation.
- Refresh the Configuration Assistant main page until the test site displays. A yellow warning symbol indicates that the operation is in progress. A red danger symbol indicates that the operation has failed. You can try to create the test site again by clicking the **Site Operations** icon, and selecting **Re-Create Test Site** from the drop-down list.

Create and Update a Test Site

If your production site is not on the most current version of the product, you can create your test site and then update the test site to the latest version of the product available.

This option must be enabled in conjunction with a customer's production site.

1. From the Configuration Assistant window, go to the Service Site for which you want to create a test site.
2. Click the menu icon and then select **Create and Update Test Site**.
3. Click **Create**.

Re-Create a Test Site

When you select the option to re-create a test site, it deletes the current test site completely and creates the test site on the same version as the production site. The option is available on B2C Service test sites.

Note: The scheduler uses the US Pacific Time Zone to re-create a test site.

1. From the Configuration Assistant main page, go to the Service site for which you want to create a test site.
2. Click the Service site link to view the site details.
3. Click the menu icon (either from the main page or from the details page) and select **Re-Create Test Site**.
4. Select one of the following clone types to create a test site:
 - o Full Clone — Refreshes a full copy of the production site into an existing test site.
 - o Sparse Clone — Refreshes the production configuration, customization, and last thousand incidents into an existing test site.
 - o Discreet Clone — Refreshes only the production configuration and customization into an existing test site. Custom Objects will also be included. Does not include the incidents or contacts tables.
5. From the Re-create test site window, click **Create**.
A confirmation dialog with details about the selected clone type appears on the screen.
Click **Yes** to proceed.
A dialog box appears on the screen indicating that the Test Site creation request is submitted.
6. Click **OK**.

Re-Create and Update a Test Site

The option to re-create and update a test site destroys, creates, and then updates the test site to the latest release available. This is enabled if an update is allowed for the test site, and is available on B2C Service test sites only.

To re-create and update a test site.

1. From the Configuration Assistant main page, go to the Service site for which you want to create a test site.
2. Click the **Service** site link to view the site details.
3. Click the menu icon (either from the main page or from the details page) and select Re-create and update test site.
A Re-create and Update Test Site window appears.
4. Click **Create**.

Enable Utilities for a Test Site

After you create or update test sites, you can enable utilities for the test site from the main page.

Utilities help you to process data on your test sites.

1. In the Configuration Assistant main page, click the menu icon for the selected test site and then select Enable Utilities.
2. Alternatively, you can select **Enable Utilities** from the in the Site Details page.
3. On the confirmation screen, click **Yes** to proceed.

The utilities are then enabled for your selected test site.

Intelligent Advisor

Create a Test Site for Intelligent Advisor

You can create a test site if the option is enabled to create the test site in conjunction with a customer's production site. The option to create a test site is available only for production sites.

To create a test site, follow the steps listed below:

1. On the Configuration Assistant main page, go to the Intelligent Advisor site for which you want to create a test site.
2. Click the Intelligent Advisor site link to view the site details.
3. Click the menu icon (either from the main page or from the details page) and select **Create Test Site**.
The Create Test Site window appears.
4. Click **Create**.

Create and Update a Test Site for Intelligent Advisor

You can create and update a test site if the option is enabled to update the test site in conjunction with customer's production site. The option to create and update a test site is available only for production sites.

To create and update test sites, follow the steps listed below:

1. On the Configuration Assistant main page, go to the Intelligent Advisor site for which you want to create a test site. Click the Intelligent Advisor site link to view the site details.
2. Click the menu icon (either from the main page or from the details page) and select **Create and Update Test Site**.
The Create and Update Test Site window appears.
3. Click **Create**.

Update a Test Site for Intelligent Advisor

This option is available only for Intelligent Advisor test sites.

You can update a test site to the latest available version without destroying the test site data. This option is enabled only when the test site is not on the latest version or when there are no other operations on the parent Intelligent Advisor site. You can also schedule updates for a future date.

1. On the Configuration Assistant main page, go to the Intelligent Advisor test site for which you want to schedule an update.
2. Click the menu icon (either from the main page or from the details page) and select **Update Test Site**. The Update Test Site window appears.



3. To schedule an update at a later date, select the desired date from the calendar. If you do not provide a date, then the update is scheduled immediately.
4. Click **Update**.

Re-Create a Test Site for an Intelligent Advisor Site

For Intelligent Advisor sites, you can create, re-create, or update test sites.

To re-create a test site, follow the steps listed below:

1. On the Configuration Assistant main page, go to the Intelligent Advisor site, for which you want to re-create a test site. Click the **Intelligent Advisor** site link to view the site details.
2. Click the **Intelligent Advisor** site link to view the site details.
3. Click the menu icon (either from the main page or from the details page) and select **Re-create Test Site**.
A Re-create Test Site window appears.
4. Click **Create**.

Re-Create and Update a Test Site for an Intelligent Advisor Site

The option to recreate and update a test site will destroy, create, and update the test site. It is enabled if an update is allowed for the test site, and is available on test sites only.

To recreate and update test site, follow the steps listed below:

1. On the Configuration Assistant main page, go to the Intelligent Advisor site for which you want to re-create a test site. Click the **Intelligent Advisor** site link to view the site details.
2. Click the menu icon (either from the main page or from the details page) and select **Re-create and Update Test Site**.
A Re-create and Update Test Site window appears.
3. Click **Create**.

Test-Site Notifications

You can view information about B2C Service and Intelligent Advisor test-site operations in the Notifications tab.

Test-site operations for which information displays includes:

- Create Test Site
- Create and Update Test Site
- Re-create Test Site
- Re-create and Update Test Site
- Update Test Site

Details for each operation includes:

- Operation Name — Name of the test site operation.
- Request Date — Date (YYYY-MM-DD) on which you requested the operation.
- Site Name — Site on which the operation is performed.
- Requested Schedule Date — Date (YYYY-MM-DD) on which the operation will be executed.
- Operation Status
 - Scheduled — Test site operation scheduled for execution.
 - In Progress — Test site operation is under execution.
 - Success — Test site operation is executed successfully and is ready.
 - Failed — Test site operation failed.

Release Updates

Overview of Managing Updates

The Manage My Update page displays information about the production and upgrade statuses of your B2C Service sites.

Update is the process of updating a site from one release to a newer one. An upgrade site is the test site that the update creates. You use it to validate the update before pushing the site to production.

You can perform a variety of B2C Service release-update tasks from the page:

- Change the upgrade site's creation date.
- View update dates for future B2C Service releases.
- Select Auto Update Program (AUP) update versions.
- Specify the day of the week on which you want to begin the upgrade-site creation.
- Customize production-site cutover preferences.
- Access related documentation.

When you click the **Site Operations** icon for your site and select **Manage My Update**, the Update Information page displays.

Manage My Update Page

The Manage My Update page shows general release-update information for a B2C Service site, and allows you to change the upgrade site's creation date.

Information that you can view from the page includes:

- Production site status
- Upgrade site status
- Update information (default view)
- Update preferences
- Update-related information

Field	Description	Notes
Production Site Status	Messages that indicate if the production site is undergoing a release update.	
Upgrade Site Status	Messages that indicate if the site is being created or if it's available.	

Field	Description	Notes
Update Information Section		
Current Version	The B2C Service version currently in use on the production site.	
Product EOL Date	The end-of-life date for the current version.	An EOL release version is not eligible for support, software patches, or service packs of any kind.
Upgrade Site Creation Date	The date upgrade site creation starts.	
Cutover Forecast Date	The forecasted date and time the production site version will be updated.	This is calculated based on update preferences.
Cutover Date and Time	The date and time the production site version will be updated.	Cutover date and time are not available before upgrade site creation and can only be changed after upgrade site creation.
Utility Delay	The number of hours B2C Service product utilities will be paused after cutover.	Utility Delay cannot be changed unless the site is undergoing an update. This information is available in the Production Status section.
Update Forecast Section		
Version	The B2C Service release to be updated.	The target version of a future B2C Service version update.
Site Creation Date	The date the version update process starts for future updates. If any future version is skipped, "Skipped" displays.	
Action	Displays an active "Opt-In" link that allows you to update to a version that you previously opted to skip. Note: The link displays only if you chose to skip a future update.	When you click Opt-In , Configuration Assistant asks you to select the day to start creating the upgrade site.

Production Site Status

Production Site Status messages indicate if the production site is undergoing a release update.

If a site is undergoing a release update, you cannot add, delete, or rename any interface on the production site.

Production-Site Status	Description
Eligible for Update	The site is not undergoing an update. A newer version of B2C Service is available.

Production-Site Status	Description
Update in Flight	The site is undergoing an update. Production site cutover has not started.
Cutover in Progress	The site is undergoing an update. Production site cutover in progress.
Cutover Complete	The site is undergoing an update. Production site cutover has completed. Avoid refreshing test site at this stage, as the cutover post-process is not completed yet.
Post Cutover Process in Progress	The post cutover process starts 24 hours after the cutover. While the process is running, it is not possible to deploy custom objects or custom fields.
Post Cutover Process Complete	The post cutover process completed. Test sites can be refreshed after this point.
On Latest Version	The site is not undergoing an update. It is running on the latest version of B2C Service.

Upgrade Site Status

You use an upgrade site to perform acceptance testing prior to production-site cutover.

Note: You should not use the site for any other purpose.

- Upgrade site statuses show if the site is being created or if it's available.
- The upgrade site only exists until production-site cutover. At cutover, the file system from the upgrade site becomes the production-site file system.

Upgrade Site Status	Description
Waiting	The site is not undergoing an update. A newer version of B2C Service is available.
Waiting for Verification	The site is undergoing an update. The target version has not been confirmed. This status applies to legacy sites only.
Waiting to Clone	The site undergoing an update. Upgrade site creation has not started.
Being Created	The site is undergoing an update. Upgrade site creation is in progress.
Active	The site is undergoing an update. An upgrade site is available for testing.
Cutover in Progress	The upgrade site is no longer available.
Cutover Complete	The site is undergoing an update. Production-site cutover has completed.
Complete	The site is not undergoing an update.
Cancelled	The update is cancelled. The upgrade site will be deleted soon.

Update Preferences

Updating preferences allows you to modify update-version, site-creation-date, and cutover preferences for a B2C Service site.

While most of the preferences are for Auto Update Program (AUP) sites, there are some preferences which are applicable to both AUP and legacy sites. These preferences allow customers to control the timing and frequency of their B2C Service site updates.

Preference	Notes
Update Version	<p>AUP sites are opted into one or more versions to ensure that a release update takes place at least once a year.</p> <p>You can edit the version preference if the production site is on a version less than a year old. For older version sites, the preference is read only. You cannot modify the version preference in such a way that it leaves more than a year gap between the updates.</p>
Site Creation Date	Upgrade site creation date for AUP sites.
Cutover Preferences	<p>Cutover date preference is set as a number of days after upgrade site creation starts, and this should reflect the duration of the user acceptance-testing period.</p> <p>Though the cutover date is calculated and established using the Cutover Preferences value, the cutover date can be rescheduled later, if needed.</p> <p>For more information, see the Reschedule Production Site Cutover section. For some sites, the utility delay is set to 0 hours. Therefore, all the utilities start running after cutover. Setting this to a non-zero value results in utilities not running until the specified delay period ends, which allows some tests to be performed before utilities start processing data.</p> <p>When an B2C Service production site is updated, Customer Portal (CP) files are migrated from the upgrade site and not from the pre-update production site. File Sync copies all production site CP files to the upgrade site 8 hours before the cutover; so no changes made to the production site after the upgrade site creation are lost. File Sync is only available to sites that are enrolled in the Auto Update Program (AUP).</p> <p>For more details about the File Sync, please refer to Answer ID 9638.</p>
Language	<p>This preference determines the language of email notifications sent from a release update incident on the Oracle support site. Update incidents are used for automated communications about release update and cutover, and they can be used to contact Oracle with general update related enquiries. Currently, English and Japanese languages are available for selection.</p>

Change Update Preferences

Use this procedure to modify your update preferences.

1. From the Configuration Assistant main page, find the B2C Service site whose update preferences you want to modify.
2. Click on the **Site Operations** icon, and then select **Manage My Update**.
3. On the Manage My Update page, click the **Update Preferences** tile.
4. Make your modifications, and click **Save**.

More Update-Related Information

The Update-Related Documentation page contains links to Knowledge Base articles on the Oracle [support site](#).

To view the articles, you must have valid support-site credentials. Contact your B2C Service administrator if you need them.

Note: Any support site account that you create on your own will not be linked to the correct organization.

Document	Description
System Requirements	This article covers the minimum Software and Hardware requirements for running B2C Service.
Update-Related Change Documents	Changes to existing functionality in a new version are documented in a number of places. This article contains links to documents that provide information about the changes that will occur as a result of an update.
Change Freeze Information	When an B2C Service site undergoes an update, a number of restrictions such as change freeze on certain components apply. This article provides information on release update related restrictions.
Update Guides	Update Guides provide general information related to the B2C Service release update, and contain a section that covers main changes between the production site version and the target version.
Maintenance Pack Information	Maintenance Packs are applied to the B2C Service sites automatically. This article contains general information about product updates, and a link to maintenance pack release schedule information.
Auto-Update Program	This article contains information about the Auto Update Program (AUP).

B2C Service Update Process

The update process start dates are set in advance, and the update customers receive two email notifications in advance, which contain the B2C Service site name and the upgrade site creation date.

Auto Update Site

Use the following procedure to change the upgrade site creation date for Auto Update Program sites.

1. On the main page, find the B2C Service that for which you want to change the utility delay.
2. Click the **Site Operations** icon, and then select **Manage My Update** from the drop-down list.
3. Click the **Change** link next to Upgrade Site Creation Date.
4. Type the date in YYYY-MM-DD format, or click the **Calendar** icon to select a new date. The time zone must be Pacific Time.
5. Click **Save**.

Legacy Update Site

Legacy sites are not eligible for the Auto Update Program (AUP). You must book updates for these sites at least two weeks in advance.

You must allow at least five weeks for the update process to complete. During this time, you should not modify the site configuration and custom code on the production site. The change freeze start date is specified at the time of booking and upgrade site creation will start on that date.

1. On the main page, find the B2C Service that you want to update.
2. Click the **Site Operations** icon, and then select **Manage My Update** from the drop-down list.
3. Click **Request Update**.

The button displays only a site that is a legacy site and is not currently undergoing an update.

4. Select the change freeze start date.

Components that are migrated from the upgrade site are included in the change freeze. For the list of components, please refer to [Answer ID 1925](#).

5. Click **OK**.

"Unconfirmed" displays next to the Project Confirmation Status field until Oracle confirms the booking.

After an update booking is confirmed, use the following procedure to modify the change freeze start date:

1. On the main page, find the B2C Service whose change freeze start date you want to modify.
2. Click the **Site Operations** icon, and then select **Manage My Update** from the drop-down list.
3. Click the **Change** link next to Upgrade Site Creation Date.
4. Type the date in YYYY-MM-DD format, or click the **Calendar** icon to select a new date. The time zone must be Pacific Time.
5. Click **Save**.

Reschedule Production Site Cutover

Upgrade-site creation must be complete before you can reschedule the production site cutover.

1. On the main page, find the B2C Service that for which you want to change the production-site cutover date.
2. Click the **Site Operations** icon, and then select **Manage My Update** from the drop-down list.
3. Click the **Change** link next to Cutover Date and Time.
4. Type the date in YYYY-MM-DD format, or click the **Calendar** icon to select a new date.
5. From the drop-down list, select either **Pacific Daylight Time** or **Pacific Standard Time**. The time you select depends on whether or not the United States is using daylight savings on the day of cutover.
6. Click **Save**.

Change Utility Delay

Specifying a utility delay allows time for you to review your site and make changes to it before running the utilities.

We recommend that you do not change the default one-hour delay unless you explicitly need additional time.

1. On the main page, find the B2C Service that for which you want to change the utility delay.
2. Click the **Site Operations** icon, and then select **Manage My Update** from the drop-down list.
3. In the Cutover Preferences section, select a utility-delay time, in hours, from the drop-down list.

Note: The maximum Utility Delay allowed in Configuration Assistant is four hours. If you need to set this value to more than four hours, submit a service request.

4. Click **Save**.

Refresh an Upgrade Site

You can re-create an Auto Update Program (AUP) upgrade site by refreshing it.

A refresh destroys an existing upgrade site and creates a new upgrade site from a fresh clone of your production site. This is especially helpful when you've made changes to your production Customer Portal pages, configuration settings, or message bases.

The upgrade-site refresh is available only for AUP sites on an August 2016 or later version, and whose cutover dates are more than seven days away.

Note: The Refresh Upgrade Site button displays only if there is an upgrade site to refresh.

1. On the main page, find the B2C Service site for which you want to upgrade site you want to refresh.
2. Click the **Site Operations** icon, and then select **Manage My Update** from the drop-down list.
3. In the Update Information section, click **Refresh Upgrade Site**.
4. After reading the Disclaimer, click **Yes** to proceed with the refresh.

When the refresh completes, an e-mail notification is sent to all the contacts associated with the AUP service request.

Note: If the upgrade site refresh is not complete before the scheduled cutover, the cutover will be postponed.

Sitemaps and Robots.txt

Enable or Disable the Sitemap Protocol

Use the Sitemap XML-based protocol to provide details to search engines about your web pages.

Search engines use web crawlers (or spiders) to explore your web site and to index pages that will be available when searches are conducted. Usually, spiders find pages from links within your site and from other sites. However, you may have pages that aren't accessible by browsing on the interface. For example, you may have pages that are accessed only when customers complete a form. Spiders can't index those pages because they're inaccessible.

Sitemap is an XML-based protocol used by major search engines, including Yahoo! and Google. The Sitemap protocol lets you identify all the web pages on your customer portal, instead of waiting for search engine spiders to find them. This includes identifying all available answer links on your site, as well as those that aren't accessible through links.

1. Click the name of web site where you want to enable or disable Sitemap.
2. Click the **Interfaces** tab.
3. Click the menu icon for the interface that you want to update.
4. Click **Enable Sitemap** or **Disable Sitemap**.

A confirmation dialog appears on the screen. Click **Yes** to proceed.

Updating the robots.txt File

You can update the robots.txt file to prevent random web crawler (or spider) searches against an Oracle b2C Service site.

To prevent random spider site searches against Oracle B2C Service sites, a robots.txt file is installed on each site interface. If Sitemap is enabled on the interface, the robots.txt file can be edited in Configuration Assistant. See [Enable or Disable the Sitemap Protocol](#).

There are some considerations when updating the robots.txt file:

- If you add lines to the text file, ensure each line ends with: **# CUSTOM**
Any lines not ending with # CUSTOM are automatically deleted.

- Don't include lines ending with: **# ADDED BY HMS**

These are default entries that are read-only and are already included in the robots.txt file.

1. Click the name of site where you want to update the robots.txt file.
2. Click the **Interfaces** tab.
3. Click the menu icon for the interface that you want to update.
4. Click the file name: **robots.txt**
5. Edit the robots.txt file as necessary.
6. Click **Submit**.

The robots.txt file is updated. To view the updated file on the interface, you can do one of the following:

- Click **Download robots.txt** on the robots.txt editor window.
- Access the URL: **https://<interface_name>.custhelp/robots.txt**

SSL Certificates

View SSL Certificates

SSL certificates are what enable websites to move from HTTP to HTTPS, which is more secure.

You can access your site's SSL certificates from the SSL Certificates tab on the Configuration Assistant main page. Information that displays includes:

- Status of installed certificates
- Subscription ID
- Creation and expiration dates

From here, you can perform any of these tasks:

- Generate a new certificate signing request (CSR)
- View certificate details
- Download a CSR
- Upload a certificate
- Delete a CSR

Note: Configuration Assistant currently supports only production instances. If you want to make any changes to your test or development sites, *Submit a Service Request*.

Generate a Certificate Signing Request

You must generate a third-party certificate from DigiCert with “Apache” specified as the server platform.

The information you provide when generating a CSR in Configuration Assistant must be identical to the information you provide to the third-party certificate vendor when requesting the certificate. Although Configuration Assistant will not technically block the uploading of multiple certificate vendors, DigiCert is the only supported B2C Service vendor for the product.

1. From the SSL Certificates page, click **Generate CSR**.
2. Enter field information:

Field	Description
Common Name	A fully qualified domain name (FQDN) or the web address for the area of your site customers will connect to using SSL.
Vhost (Subject Alternative Names)	The list of your SANs.
Organization	The legal name of your organization. Note: Do not use symbols & or @ or any other symbols that use the shift key.
Organizational Unit	The certificate management division of your organization.
City	The city where your organization is located.
State	The state where your organization is located.
Country	The two-letter ISO country code where your organization is located.
Subscription	The subscription for which the certificate can be provisioned. The subscription also contains the Subscription ID and the remaining SSL certificate entitlements of the subscription.

3. Click **Create** to generate the CSR.
After the CSR is generated, the certificate status changes to Cert Needed.

Download a Certificate Signing Request

Use this procedure to download a CSR.

1. From the SSL Certificates page, select **Download CSR** from the SSL Operations drop-down list.
2. Choose what you want to do with the file, and click **OK**.

Upload an SSL Certificate

Use this procedure to upload an SSL certificate.

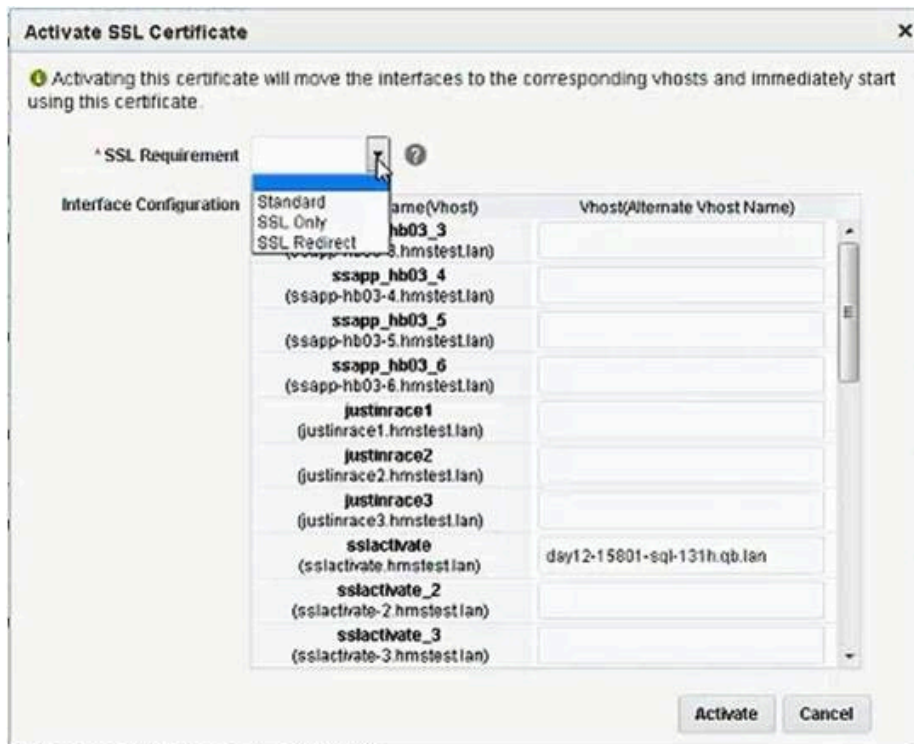
1. From the SSL Certificates page, select **Upload Certificate** from the SSL Operations drop-down list.

- In the Upload SSL Certificate window, click **Browse** and select the appropriate certificate.
- Click **Upload**.

An Information window opens confirming the certificate was uploaded. After the certificate is uploaded, the certificate status changes to Provisioned. After a certificate is provisioned, the SSL Operations drop-down list updates to include the Activate and Delete options. Keep in mind, however, that you cannot delete activated certificates.

Activate an SSL Certificate

- Prior to activation, the DNS Administrator must change the CNAME record. Contact your DNS Administrator to put a CNAME entry in your DNS server that points to the appropriate domain. For example, example_domain.com IN CNAME example.custhelp.com
 - The activation will not be allowed if DNS is not properly configured by your DNS Administrator.
 - You must use a CNAME and not an A record for redundancy and reliability. Oracle Cloud Operations recommends customers create CNAME records to link customer-owned, branded domains to the custhelp domain(s) provided within the default application.
 - The use of CNAME records is a powerful and flexible solution that allows the underlying Oracle IP address to change if necessary without requiring customers to update their DNS. Our customers report the best experience when using CNAME records over A records.
- From the SSL Certificates page, click the menu icon and then select Activate. The Activate SSL Certificate window opens.



- From the SSL Requirement drop-down list, select the SSL type that needs to be installed.

Requirement Types	Description
Standard	Requests to HTTP and HTTPS behave normally.
SSL Only	Requests to HTTPS are accepted but requests to HTTP are rejected.
SSL Redirect	Requests to HTTP are automatically redirected to HTTPS.

3. Select the interface from which the certificate is to be activated from the Interface Configuration list.
4. Type the hostname in the Vhost (Alternate Vhost Name) field, and then click **Activate**.
An Information window confirms activation. The certificate status changes to Active.

Renew an Existing SSL Certificate

You can renew any active SSL certificate.

Only an active SSL certificate is eligible for renewal. Before you can do so, however, you must first generate a new certificate signing request.

1. From the SSL Certificates page, select **Request Renew CSR** from the Active cert drop-down list.
The request processes instantly. A new CSR appears in the SSL certificates list with the same name, and is used to renew the existing certificate. After the CSR generation is complete, the certificate status changes to Cert Needed.
2. From the SSL Certificates main page, select **Download Renewed CSR** to download the renewed CSR. You can find this option on the renewed CSR's menu icon.

Note: You must purchase or renew the certificate from DigiCert or your preferred, publicly trusted Certificate Authority with this renewed CSR.

3. After you obtain the new certificate from DigiCert, or from your preferred, publicly trusted Certificate Authority, select upload Renewed Certificate from the service's menu icon on the SSL Certificates main page.

An Upload SSL window appears.

- o Click **Choose File** and select the renewed SSL certificate.
- o Click **Upload**.

After the renewed certificate is uploaded, the certificate status changes to Provisioned.

4. From the service's menu icon for the renewed certificate (with status Provisioned) on the SSL Certificates main page, select **Activate Renewed Certificate**.
A Confirm Activate Renewed Certificate window appears.
5. Click **Activate**. An Information window appears confirming the certificate was successfully activated.

Data and Usage Statistics

Overview

You can monitor service storage usage data to help you determine whether the database storage limits for a service are less utilized or overutilized.

Usage limits vary for each subscription type. Monitoring statistics also helps you manage your database storage by deleting, purging, or archiving data that exceeds the storage limits.

View Current Usage Statistics

The Statistics page displays average data and storage statistics as well as historical average data usage and record count.

To view current usage statistics, click **Statistics** from the Configuration Assistant main page.

The record count and storage graph displays the average record count and data storage statistics for top-10 tables (by data size) for the latest available week, sorted by data size.

The Data Storage table displays the average record count and data storage statistics for all tables, for the latest available week, sorted by total storage.

Data Storage Table

In the Data Storage table, you can export data, format data, and customize the columns you want to display.

The Data Storage table looks something like this:

Data Storage ?

Table Name	Record Count(K)	Storage(KB)	Index Size(KB)	Percent
Phrases	2,673,789	133,738,409	70,396,580	14.47
Contacts	129,664	15,288,240	63,606,424	5.59
Incident Performance	239,342	18,724,628	42,872,572	4.36
Opportunity Phrases	478,477	22,569,550	32,148,226	3.87
Opportunities	36,103	14,012,121	31,554,666	3.23
Marketing Activities	120,775	7,730,809	34,322,549	2.98
Incidents	45,331	10,387,493	21,838,575	2.28
Products to Quotes	86,873	10,957,600	3,071,246	0.99
Archived Incidents	42,957	6,689,910	6,515,851	0.93
Deleted Records	65,411	5,712,642	4,322,230	0.71

Record Count: 404

Manage the Data Storage Table

Use this procedure to manage the data-storage table.

1. To export usage data to a spreadsheet, from the Menu option, click **Export to Excel**. Data displayed on the table is saved to a spreadsheet.
2. To customize the column display, from the View menu, click **Columns**.
 - o Select or clear the columns to be displayed as required.
 - o To sort the columns, from the View menu, click **Sort**.
 - Select a column header to sort.
 - From the Sort menu, click the arrows or select either Ascending or Descending option.
 - o To further refine your display, from the Sort menu, select Advanced. In the Advanced Sort dialog box, select the following:
 - Sort By: Select the main column to sort by. For example, Table Name. Select either the Ascending or Descending order.
 - Then By: (Optional). Select the second column to sort by. For example, Storage. Select either the Ascending or Descending order.
 - Then By: (Optional). Select the third column to sort by. For example, Percent. Select either the Ascending or Descending order.

If you select all the three sort parameters, then the table is sorted first by the main column (for example, Table Name) in the order specified and then within that, by the second (for example, Storage) or third column as specified.

3. To format the data storage table, click **Format**. You can resize columns or use the column wrap to format data within the cells.
 - o Select a column header.
 - o To resize, from the Format menu, click **Resize Columns**.
 - In the Resize Column dialog box, enter the preferred width.
 - Select the unit, either Pixels or Percent.
 - Click **OK**.
 - o To wrap text within the cells, from the Format menu, select **Wrap**.
4. To freeze a column, select the column header and click **Freeze**. This is useful for tables with multiple columns.
5. To wrap text within the cells of a column, select a column header and click **Wrap**.

View Historical Usage Statistics

The Historical Statistics section displays historical data, including the number of records in the database and storage utilization.

To view historical data, you can select the following:

- Month View/Quarterly View/Yearly View link: Displays corresponding monthly, quarterly or yearly average data usage in the form of a graph for a selected table.
- Table Name: Select the table name for which you want to view historical utilization, that is, the average record count and the average data storage for the selected period (monthly, quarterly, or yearly). Displays data usage in the form of a graph.

View Subscription Details

You can view details about your organization's paid subscriptions in the Subscriptions tab.

Subscription information includes:

- Subscription ID
- SKU number
- Subscription start and end dates
- Total Quota
 - o Sites
 - o Interfaces
 - o Mailboxes
 - o Certificates
- Services
 - o Features
 - o Product add-ons

- Integrations

