

Oracle Digital Experience for Communications

Implementing Care Experience

October 2023



Oracle Digital Experience for Communications
Implementing Care Experience

October 2023

F77905-05

Copyright © 2023, Oracle and/or its affiliates.

Author: Tejaswi Tatavarthi

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Get Help	i
<hr/>	
1 About This Guide	1
Audience and Scope	1
Related Guides	1
2 Overview	3
Before You Begin	3
Overview of Care Experience Implementation	3
3 Manage Roles	5
Understand Predefined Duty and Job Roles	5
Manage User-Defined Roles	9
Create Oracle Fusion Users for Inbound Flows	11
Add Functional Security to Enable User to Create Accounts	12
Add Roles to Enable Oracle Fusion Payments in Sales Catalog Checkout	12
Add Roles to Enable Creating Shipping Methods and Carriers	13
Synchronize Users Between Care Experience and CX Industry Framework Identity Management	14
4 Manage Subscription Accounts	19
Data Security for Subscription Accounts	19
Configure Data Security Policy	20
5 Manage Standard Lookups	23
Rename Contact Address Type List of Values	23
Enable Home and Work or Business in Contact Address Type List of Values	23
Disable Unsupported Address Types in Contact Address Type List of Values	23
Change Address Type List of Values	24
6 Manage Profile Options	25
Manage Profile Options	25

7	Manage Service Requests	27
	Create a Service Request Category	27
	Create Service Request Assignment Rules	27
	Add Waiting Status to Billing Adjustment Service Requests	28
	Add Detail Page Link in Service Request List Page	29
8	Manage Data Security Policies for Contact Management	31
	Manage Data Security Policy for Update of Contact and Related Child Objects	31
	Manage Data Security Policy for Update of Contact Relationship with the Organization	32
	Manage Data Security Policy to Access Home Phones	32
	Manage Data Security Policy to Access Home Address	33
9	Integration with External Applications	35
	Create Configuration API and Billing and Revenue Management Roles	35
	Integrate Address Verification Cloud Service with CX Industries Framework	36
	Enable Address Verification and Address Search	38
	Oracle Retail Order Broker Integration Prerequisites	39
	Integrate Flytxt with CX Industries Framework	40
10	Configure CTI	43
	Enable Redwood User Interface	43
	Configure CTI	43
	Set Up Pop-Up Windows	44
11	Configure Digital Assistant	47
	Set Up Oracle Identity Cloud Service for Authentication of Self Service Client Application	47
	Set Up Redirect URL in Oracle Identity Cloud Service	47
	Set Up Oracle Fusion Service	48
	Set Up Digital Assistant	53
12	Extend Care Experience	57
	Extend Care Experience: Overview	57
	Embed Third-Party Payment Vendor Page in Checkout Workflow	57
13	Manage Tenant Configuration	65
	Configure Tenant	65

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide is for customer service managers and administrators who intend to set up Care Experience.

This guide provides information on how to set up Care Experience and its related systems. It introduces and explains the various components supported by Care Experience, such as managing roles, configuring CTI, and setting up assignment rules.

Related Guides

Refer to the following guides for additional information related to Care Experience.

Guide	Description
Oracle Digital Experience for Communications Using Care Experience	Describes how to perform daily tasks in your Care Experience application, with details on the different functionality and user flows.
Oracle CX Implementing Sales	Describes how to set up sales automation capabilities in Oracle CX Sales using a case study to describe concepts and procedures.
Oracle CX Service Implementing Fusion Service	Describes how to set up service components and features of Oracle CX Sales Fusion Service.
Data Driven Experience Integration in Care (My Oracle Support Document ID 2835873.1)	Describes how to integrate Care with third-party Data-Driven Experience (DDE) insight providers to display churn propensity scores and offer recommendations to agents.

Related Topics

2 Overview

Before You Begin

Before using the Care Experience application, check the operating systems, supported browsers, and other computer requirements.

Here are the mandatory setup tasks that you must do before implementing your application:

- **Configure Offerings:** Configure offerings to modify functionality so that it matches the services you plan to implement. You can review the current functional areas and features within an offering and make changes. To perform these tasks, you need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV).

For more information, see the Overview of Configuring Offering in the Using Functional Setup Manager Guide.

- **Company Information and Corporate Currency:** These steps are required if you haven't previously configured CX Service in your instance. What you have to do is enter basic information in the Sales: Setup page about your company and specify your corporate currency. Your entries are required for internal application purposes only and are required for your instance of CX Service. The information you enter creates a rudimentary enterprise structure and isn't visible to service organization users or customers.

For more information, see the Enter Your Company Information and Corporate Currency topic in the Implementing Fusion Service guide.

You must also set up VB Studio to extend Oracle Cloud applications. An application extension is an artifact that enables you to extend certain Oracle Cloud applications to meet your business needs. You deploy an application extension to an Oracle Cloud applications instance. Only one VB Studio instance can be provisioned in an Oracle Cloud account. By default, a VB Studio instance is provisioned with your first Oracle Cloud Applications *-TEST instance that your organization's members can use to develop application extensions. If you need to use VB Studio with a different Oracle Cloud Applications instance, file a service request. Oracle deletes the VB Studio instance associated with your *-TEST instance and creates a new VB Studio instance in your preferred identity domain.

For integration with Oracle Billing and Revenue Management, BRM PS5 is required.

Related Topics

Overview of Care Experience Implementation

This topic summarizes the tasks that you perform to set up the Care Experience application. Perform the steps provided in this guide in conjunction with, or after completing, the steps mentioned in Oracle CX Service Implementing B2B Service guide.

You can use this table as a checklist to understand the sequence of the tasks and where you perform them.

Setup Activity	Work Area and Task
Create Custom Roles, Users, and Associate Roles	Tools > Security Console
Configure Profile Options	Setup and Maintenance > Manage Omnichannel Profile Options
Create Category	Setup and Maintenance > Manage Service Request Categories
Create Service Request Assignment Rules	Setup and Maintenance > Manage Service Assignment Rules
Manage Capacities	Setup and Maintenance > Manage Capacities
Add Detail Page Link	Configuration > Application Composer > Standard Objects > Service Requests
Configure CTI	Media Toolbar: Setup and Maintenance > Manage Media Toolbar Configuration Application Classification: Setup and Maintenance > Manage Application Classification Screen Pop-up Page: Setup and Maintenance > Manage Screen Pop Configuration

Related Topics

3 Manage Roles

Understand Predefined Duty and Job Roles

Using duty roles and job roles, you have the ability to view and manage subscription accounts, billing care, and order care, data in the Care Experience application. When deploying the application, you have access to predefined security privileges and roles.

Customer relationship management application administrator, customer service manager, and customer service representative are predefined job roles of the Oracle CX Sales and Fusion Service applications. They are assigned several duty roles and privileges related to the capabilities of these cross-industry applications. The job roles predefined here are a super set of those cross-industry roles.

This section provides an overview on how those predefined roles and privileges are defined and made available to the application administrators, service representatives, and service managers. For details on Oracle Fusion security and how to create new roles with specific privileges for users, see *Securing Applications* guide and *Securing Sales and Service* guide.

Predefined Privileges for Subscription Accounts

Here are the predefined functional privileges:

- Create, delete, manage, update, and view subscription accounts.
- Create, delete, and view subscription account billing profiles.
- Create, delete, and view subscription account management roles.
- Create, delete, and view subscription account relationships.

Predefined Privileges for Billing Care

Here are the functional privileges:

- View bills and generate bill on demand.
- View unbilled usage.
- View, take, allocate, and reverse payment.
- Issue refund.
- View, create, edit, delete, submit, request approval and submission, and approve adjustment request.
- View, add, and remove adjustment request events.
- View account receivable charges.
- View, create, and edit bill disputes.
- View customer dashboard.

Predefined Privileges for Order Care

Here are the functional privileges:

- View, cancel, pause, and create follow-on orders.
- View order activity.
- Create order revision.
- View order dashboard.

Predefined Duty Roles for Subscription Accounts and Subscription Care

Here are the duty roles predefined for subscription accounts:

Duty Role	Description	Privileges
Subscription Account Viewer	The duty role of subscription account viewer is assigned to an analyst or a support user who need access to data for developing reports or for assisting a service or sales agent. This duty role provides the ability to view data and not modify it.	<ul style="list-style-type: none"> • View subscription accounts, subscription accounts billing profiles, subscription accounts relationships, and subscription accounts management roles. • Search and view customer account site. • View customer account and customer account site use. • View trading community common setup. • View trading community organization relationship.
Subscription Account Management	The duty role of subscription account management is assigned to a service or a sales agent who interacts with customers and prospects and can view, update, and create customer-related records and data. This duty role doesn't provide the ability to delete records because deletion can impact multiple users or company processes.	<p>The subscription account management role includes all the privileges of subscription account viewer. Here's the list of additional privileges:</p> <ul style="list-style-type: none"> • Enter customer accounts. • Add, update, and remove customer account site use. • Create, move, and remove customer account site. • Create and update subscription accounts. • Create subscription account billing profiles. • Create and delete subscription account relationships. • Create subscription account management role.
Subscription Account Administration	The duty role of subscription account administration is assigned to a data steward or an application administrator who must clean data or fix specific data-related issues. This role provides broad privileges apart from the record and data deletion and update abilities. Only a few users with deep application	<p>The subscription account administration role includes all the privileges of subscription account management. Here's the list of additional privileges:</p> <ul style="list-style-type: none"> • Remove customer accounts.

Duty Role	Description	Privileges
	knowledge and specific level of responsibility and accountability are assigned to this role.	<ul style="list-style-type: none"> Remove and update trading community organization relationship. Delete subscription account. Delete subscription account billing profile. Delete subscription account management role.

Predefined Duty Roles for Subscription Care

Here are the duty roles predefined for subscription care:

Duty Role	Description	Privileges
Subscription Care Management	<p>Can view and read customer subscription data. Can perform all agent subscription care actions such as:</p> <ul style="list-style-type: none"> View possible actions on subscriptions Suspend, resume, and cancel subscriptions 	<ul style="list-style-type: none"> View possible actions on subscriptions Suspend active subscriptions Cancel active and suspended subscriptions Resume suspended subscriptions

Predefined Duty Roles for Billing Management

Here are the duty roles predefined for billing management:

Duty Role	Description	Privileges
Billing Care Viewing	The duty role of billing care viewing is assigned to an analyst or support users who require access to billing care data for developing reports or for assisting a service agent. This duty role enables data viewing without the ability to create or modify the data.	<ul style="list-style-type: none"> View customer dashboard. View bills, bill dispute, and unbilled usage. View payments. View account receivable charges. View adjustment request and adjustment request events. View assets.
Billing Care Management	The duty role of billing care management is assigned to a customer service representative who interacts with customers and can view, update, and create customer-related billing records and address customer billing inquiries. This role enables the agent to take and allocate payment, issue refund, bill on demand, create and submit billing adjustment requests, and raise billing disputes. This role doesn't include the approval of adjustment requests that require manager approval.	<p>The billing care management role includes all the privileges of billing care viewing. Here's the list of additional privileges:</p> <ul style="list-style-type: none"> Create, edit, and submit adjustment request. Add and remove adjustment request event. Request adjustment request approval and submission. Take, reverse, and allocate payment.

Duty Role	Description	Privileges
		<ul style="list-style-type: none"> Bill on demand. Issue refund. Create and edit bill dispute.

Predefined Duty Roles for Order Care

Here are the duty roles predefined for order care:

Duty Roles	Description	Privileges
Order Care Viewing	The duty role of order care viewing is assigned to an analyst or support users who require access to order care data for developing reports or for assisting a service agent. This duty role enables data viewing without the ability to create or modify the data.	<ul style="list-style-type: none"> View orders View order activities View order orchestration View order dashboard
Order Care Management	The duty role of billing care management is assigned to a customer service representative who interacts with customers and needs cancel, revise, and pause orders and also create follow-on orders for in-flight orders.	<p>The order care management role includes all the privileges of order care viewing. Here's the list of additional privileges:</p> <ul style="list-style-type: none"> Cancel order Pause orders Create order revision Create follow-on orders

Predefined Job Roles

Here are the job roles that are predefined and assigned child job roles, duty roles, and job-specific privileges:

- Communications Customer Relationship Management Application Administrator
 - Child Job Roles: Customer Relationship Management Application Administrator
 - Duty Roles: Billing Care Management and Subscription Account Administration
 - Job-Specific Privileges: Approve adjustment request and delete adjustment request.
- Communications Customer Service Manager
 - Child Job Roles: Customer Service Manager
 - Duty Roles: Billing Care Management and Subscription Account Management
 - Job-Specific Privileges: Approve adjustment request.

- Communications Customer Service Representative
 - Child Job Roles: Customer Service Representative
 - Duty Roles: Billing Care Management and Subscription Account Management
 - Job-Specific Privileges: None

Related Topics

Manage User-Defined Roles

This chapter explains how you can create users with the required roles and privileges to complete the application setup. This includes granting specific privileges to initial users and other users as well.

Note: After an update, custom roles that you had created, don't automatically get new privileges as part of the update. You must manually add these new privileges to your custom roles. For more information, see *Securing CX Sales and Fusion Service*. If you copied or cloned roles then you can use the Security Console to compare each default seeded role with your custom role and update your custom role if required. For details, see *Securing Applications* guide.

Create User-Defined Roles

To create user-defined roles, you must configure the standard roles shipped with Oracle CX Service.

For example, here you create and configure the DX4C Communications Customer Service Representative (user-defined role) and map it to the Communications Customer Service Representative (standard role) to work with the agent care features.

Before you begin, consider these points:

- You're required to create roles as part of the initial setup.
- Ensure that you don't create roles during upgrades or while updating the configuration.

Here's how you create the DX4C Communications Customer Service Representative role.

1. Go to **Navigator > Tools > Security Console**.
2. In the Roles tab, search and select the Communications Customer Service Representative job role.
3. In Search Result Count, select the drop-down list corresponding to the role name: Communications Customer Service Representative. Click **Copy Role**.
4. On the Copy Options dialog box, select **Copy top role and inherited roles**, and click **Copy Role**.
5. On the Copy Role Communications Customer Service Representative: Basic Information page, enter the following values, and click **Next**.

Role Name	Value
DX4C Communications Customer Service Representative	<code>DX4C_COMMUNICATIONS_CUSTOMER_SERVICE_REPRESENTATIVE</code>

Role Name	Value

6. Click the Summary train stop.
7. Click **Submit and Close**.
8. On the confirmation dialog box, click **OK**.
9. Use the following table to find the standard role, new role, role code, and privileges.

Standard Role Name	New Role Name	New Role Code
Communications Customer Service Manager	DX4C Communications Customer Service Manager	DX4C_COMMUNICATIONS_CUSTOMER_SERVICE_MANAGER
Communications Customer Relationship Management Application Administrator	DX4C Communications Customer Relationship Management Application Administrator	DX4C_COMMS_CRM_APPLICATION_ADMINISTRATOR

Create Users

Here's how you create different users such as agent, manager, and administrator. You must be an administrator to do this task.

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, use the Manage Users task.
 - o Offering: Service
 - o Functional Area: User and Security
3. On the Search Person page, click Create.
4. Specify the following details to create a user.
 - a. In the Employment Information section, select the Person Type as Employee, and in the Resource Information section, select Resource Role as Service Representative.
 - b. Specify the required details, such as Last Name, Email, Hire Date, Legal Employer, and Business Unit.
5. Click **Autoprovision Roles**.
6. Click **Save and Close**.

User	Value
Manager	Service Manager
Administrator	Service Administrator

Associate Job Roles With Users

Once you have created a role, you must associate job roles with this user. You must associate job roles with the following users: Agent, Manager, and Administrator.

1. Go to **Navigator > Tools > Security Console**.
2. On the Security Console page, go to **Administration > Users**.
3. Search for the user to whom you want to assign a job role. Select the user account to associate appropriate roles with the user.
4. To associate roles with the user account, click **Edit > Add Role**.
5. On the Add Role Membership dialog box, search for the appropriate role.
6. Select the role from search results, and click Add Role Membership.
7. On the confirmation dialog box, click **OK**.

To associate other roles with the user account, repeat the steps 3 to 8. Use the following information.

User	Role to Associate
Agent	DX4C Communications Customer Service Representative
Manager	DX4C Communications Customer Service Manager
Administrator	DX4C Communications Customer Relationship Management Application Administrator

Related Topics

Create Oracle Fusion Users for Inbound Flows

Events flow from one application to another.

An inbound event calls the applicable REST APIs with the user assertion token via the TMF adapter in the CX Industries Framework. So you must create a user with FABRIC_SYSTEM_USER as the user name and assign all the relevant roles.

1. Go to **Tools > Security Console**.
2. Go to **Users > Add User Account**.
3. Enter the following details:
 - o First Name: For example, John.
 - o Last Name: For example, Doe.
 - o Email: Provide any email address where you can receive the email notifications
 - o User Name: **FABRIC_SYSTEM_USER**
 - o Password: Any user-defined password
 - o Confirm Password: Same as password
4. Click **Add Role**, search for the following roles, click **Add Role Membership** and the click **Done**.

- Communications Customer Service Representative
- Communications Customer Service Manager
- Communications Customer Relationship Management Application Administrator
- Sales Administrator

5. Click **Save and Close**.

Add Functional Security to Enable User to Create Accounts

This optional step is required only if you want to enable customer service representative or customer service manager to create new accounts. You must add functional security to enable user to create accounts.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role to do this task:

1. Go to **Navigator > Tools > Security Console**.
2. If you have duplicated Communications Customer Service Representative role, search for the duplicated role, corresponding to the selected application role, select **Edit Role**. Skip to step 8.
3. If you haven't duplicated the role, then on the Security Console page, search for **Communications Customer Service Representative** role and select **Communications Customer Service Representative**.
4. In the search results, corresponding to the selected application role, select **Copy Role**.
5. In the Copy Options dialog box, select **Copy top role** and click **Copy Role**.
6. On the Copy Roles: Basic Information page, review and edit:
 - Role Name: `DX4C Communications Customer Service Representative`
 - Role Code: `DX4C_COMMUNICATIONS_CUSTOMER_SERVICE_REPRESENTATIVE`
 - Description values as appropriate.
7. Click **Functional Security Policies** train stop.
8. Click **Add functional Security Policy**.
9. Search and select `ZCM_CREATE_SALES_ORGANIZATION_PRIV`, if Create Account privilege is required.
10. Click **Add privilege to Role**.
11. Click **Users** train stop and add required users.
12. Click **Summary and Impact Report** train stop.
13. Click **Submit and Close**.
14. Click **OK**.

Add Roles to Enable Oracle Fusion Payments in Sales Catalog Checkout

This optional step is required only if you want to use the Fusion Paypal gateway. You must add functional security to enable customer service representative or customer service manager to use the payment gateway.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role to perform this task.

1. Go to **Navigator > Tools > Security Console**.
2. If you have duplicated Communications Customer Service Representative role, search for the duplicated role, corresponding to the selected application role, select **Edit Role**. Skip to step 8.
3. If you haven't duplicated the role, then on the Security Console page, search for **Communications Customer Service Representative** role and select **Communications Customer Service Representative**.
4. In the search results, corresponding to the selected application role, select **Copy Role**.
5. In the Copy Options dialog box, select the copy option for **Copy top role and inherited role** and click **Copy Role** button.
6. On the Copy Role: Basic Information page, review and edit:
 - o Role Name: DX4C Communications Customer Service Representative
 - o Role Code: DX4C_COMMUNICATIONS_CUSTOMER_SERVICE_REPRESENTATIVE
 - o Description values as appropriate.
7. Click **Role Hierarchy** train stop.
8. Click **Add Role** button.
9. Search for role `ORA_IBY_PAYMENT_SETTLEMENT_MANAGEMENT_DUTY` and add.
10. Assign to the required user in the Users section.
11. Submit the change.
12. Run the scheduled jobs.
13. Import user and role application security data and retrieve latest lightweight directory access protocol (LDAP) changes.

Add Roles to Enable Creating Shipping Methods and Carriers

You must add these roles to be able to create shipping methods and carriers in Care experience.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role to perform this task.

1. Go to **Navigator > Tools > Security Console**.
2. If you have duplicated Communications Customer Service Representative role, search for the duplicated role, corresponding to the selected application role, select **Edit Role**. Skip to step 8.
3. If you haven't duplicated the role, then on the Security Console page, search for **Communications Customer Service Representative** role and select **Communications Customer Service Representative**.
4. In the search results, corresponding to the selected application role, select **Copy Role**.
5. In the Copy Options dialog box, select the copy option for **Copy top role and inherited role** and click **Copy Role** button.
6. On the Copy Role: Basic Information page, review and edit:
 - o Role Name: DX4C Communications Customer Service Representative
 - o Role Code: DX4C_COMMUNICATIONS_CUSTOMER_SERVICE_REPRESENTATIVE
 - o Description values as appropriate.
7. Click **Role Hierarchy** train stop.
8. Click **Add Role** button.
9. Search for role `SUPPLY_CHAIN_COMMON_VIEW_WEB_SERVICE` and add.
10. Click **Summary** train stop.

11. Submit the change and close the confirmation message.
12. Add the duplicated role you created above to the agent user.

To create a carrier, see <https://docs.oracle.com/en/cloud/saas/supply-chain-and-manufacturing/23c/fasrp/op-carriers-post.html>.

To create a shipping method, see <https://docs.oracle.com/en/cloud/saas/supply-chain-and-manufacturing/23c/fasrp/op-carriers-carrierid-child-shippingmethods-post.html>

Synchronize Users Between Care Experience and CX Industry Framework Identity Management

Use this topic to synchronize users between Care Experience and CX Industry Framework Identity Management (IDCS).

This configuration is done in the CX Industry Framework identity domain, and includes these tasks:

- Configure the application and define user name suffixes.
- Test the configuration.
- Activate the synchronization process.

Configure the Application

1. Log in to your CX Industry Framework identity domain in your Oracle Cloud Infrastructure account. You can get this link from your welcome email. If you have questions about which tenancy and domain to log in to, contact your Oracle Support team.
2. Create a new application by selecting **Applications** in the navigation pane, and then click the **Add application** button.
3. Select Application Catalog and then click the Launch app catalog button.
4. Search for and select the template named Oracle Fusion Applications Release <X>, where the release is 13 or later.
5. On the Add Oracle Fusion Applications Release screen, complete these fields:
 - **Name**
 - **Description** (optional)
 - **Application icon** (optional)
6. Click **Next**.
7. In the **General** section, complete these fields using a bogus URL that begins with **http://** and ends with **.com**:
 - **Entity ID**: http://bogus-url.com
 - **Assertion Consumer URL**: http://bogus-url.com
8. Under **Additional configurations**, complete these fields with the same URL:
 - **Single Logout URL**: http://bogus-url.com
 - **Logout Response URL**: http://bogus-url.com
9. Click **Next**.
10. Turn On **Enable Provisioning** and click **Confirm**.
11. In the **Configure connectivity** section, complete the following fields:

- **Administrator Username:** Enter your Fusion applications administrator credentials.
 - **Administrator Password:** Enter your Fusion applications administrator password.
 - **Host Name:** Enter the Fusion application URL hostname portion without **http://**. For example, **myFAhostname.oraclecloud.com**
 - **Port Number:** 443
 - **SSL Enabled:** Select this option.
 - **Override Custom Sync:** Deselect this option.
12. In the **Fusion administrative roles** field, add these three roles, each on a different line:
- Communications Customer Service Representative
 - Communications Customer Service Manager
 - Communications Customer Relationship Management Application Administrator
 - Any custom roles created by customers for Care Experience
13. In the **Provisioning Operations** section, complete these fields:
- **Authoritative sync:** Select this option.
 - **Create account:** Select this option.
 - **Update account:** Select this option.
 - **Deactivate account:** Select this option.
 - **Delete account:** Deselect this option
14. Turn on **Enable Synchronization**.
15. Scroll up to view the **Configure Attribute Mapping** section and click the **Attribute mapping** button.
16. On the Attribute mapping screen select the **Application to identity domain** option.
17. Locate the row with the **User** column value set to **Federated** and modify the source value in the left column to be **true** where it says **false**.
18. Click the **Save changes** button, which returns you to the previous screen.
19. In the **Configure synchronization** section, complete the **Synchronization Schedule** field with the frequency you want to use for synchronization. The recommended value is **Every hour**.
20. Click **Finish**.
21. When you are ready to either test the synchronization, or make the synchronization live, Click **Activate** and continue to the next task.

Test the Synchronization

This process includes importing users and groups that you want to synchronize, and tests the synchronization setup to ensure that the selected Fusion application users and groups are being synchronized to the Fusion application identity domain. When you have successfully tested the synchronization, you then activate the process using the instructions in the next task.

1. From where you left off in the previous task, scroll down to the **Resources** section in the navigation panel and select **Import**, and then click the **Import** button.
2. The message on the screen indicates that the import job has been submitted and is running. Refresh the screen until the **Import status** changes to **Complete**.
3. Go back to the main screen for the Fusion applications identity domain to verify that users were successfully copied from Fusion applications.
4. In the navigation pane, click **Users** and **Groups** respectively to verify:

- **Groups:** Verify that the groups you expect to see are available.
 - **Users:** Verify that the users you expect to see are available and that they are members of the correct groups.
5. Remove the test results by completing these steps:
 - Deactivate the application created in the previous task.
 - Delete all users and groups that were migrated into Fusion applications identity domain.
 6. Complete the steps in the next task to activate the synchronization process.

Activate the Synchronization Process

1. Log in to your CX Industry Framework identity domain in your Oracle Cloud Infrastructure account. You can get this link from your welcome email. If you have questions about which tenancy and domain to log in to, contact your Oracle Support team.
2. Select **Domains**, then click on the domain name.
3. Select **Oracle Cloud Services** from the navigation panel and locate the application corresponding to the CXIF instance. The name starts with either **CXIF** or **DX4C**, and the description likely reads *CXIF IDCS Application*. It was created during the CX Industry Framework provisioning process.
4. Select the application and then, under **Resources**, select **Application roles**.
5. Verify that the application has the following application roles:
 - dx_DX4C_Configuration_Endpoint_Read
 - dx_DX4C_Configuration_Endpoint_Write, and others
6. Using the steps in the previous task, activate the application and import the users and groups again.
7. When the import is complete, return to your CX Industry Framework identity domain, select your domain, and then select **Groups** from the navigation pane. Verify that these groups are displayed:
 - Communications Customer Service Administrator
 - Communications Customer Service Manager
 - Communications Customer Service Representative
8. Return to the application referenced in step 3, and then select **Application roles**. The roles beginning with "dx" are displayed.
9. Assign Groups to the role **dx_DX4C_Configuration_Endpoint_Read**. To assign the groups, complete these steps for each role:
 - a. Click on the action menu and click **Assign groups**.
 - b. Select the three groups listed above that are associated with the utility customer service agent, manager, and administrator, and click **Assign**.
10. Once all of the groups are assigned, you have completed the process.

Assign Digital Experience for Communications Endpoint Read to Care Users

You can assign Digital Experience for Communications configuration endpoint read to care users by following these steps:

1. Log in to the **Administration** console of your CX Industry Framework identity domain in your Oracle Cloud Infrastructure account.

2. Navigate to Oracle Cloud Services.
3. Drill down to the application starting with **CXIF_**
4. Click the **Application Roles** sub-tab.
5. Find **DX4C_Configuration_Endpoint_Read** and assign the following Care roles:
 - o DX4C_Configuration_Endpoint_Read
 - o DX4C_Configuration_Endpoint_Write
 - o DX4C_Configuration_Routing_Read
 - o DX4C_Configuration_Routing_Write
 - o DX4C_Configuration_API_Registration_Read
 - o DX4C_Configuration_API_Registration_Write

4 Manage Subscription Accounts

Data Security for Subscription Accounts

The communications account model uses these security privileges:

- Subscription Accounts
- Billing Profiles
- Subscription Account Relationships
- Subscription Account Management Roles
- Subscription Account Asset Relationships

This table describes the data privileges:

Object	Object Code	Data Privilege	Data privilege Code
Subscription Accounts	ATC_SUBSC_ACCOUNTS	Update	ATC_UPDATE_SUBSCRIPTION_ACCOUNTS_DATA
Subscription Accounts	ATC_SUBSC_ACCOUNTS	Delete	ATC_DELETE_SUBSCRIPTION_ACCOUNTS_DATA
Subscription Accounts	ATC_SUBSC_ACCOUNTS	View	ATC_VIEW_SUBSCRIPTION_ACCOUNTS_DATA
Subscription Accounts Relationships	ATC_SUBSCR_ACC_RE	Update	ATC_UPDATED_SUBSCRIPTION_ACCOUNTS_REL_DATA
Subscription Accounts Relationships	ATC_SUBSCR_ACC_RE	Delete	ATC_DELETE_SUBSCRIPTION_ACCOUNTS_REL_DATA
Subscription Accounts Relationships	ATC_SUBSCR_ACC_RE	View	ATC_VIEW_SUBSCRIPTION_ACCOUNTS_REL_DATA
Subscription Accounts Management Roles	ATC_SUBSCR_ACC_ROLES	Update	ATC_UPDATED_SUBSCRIPTION_ACCOUNTS_ROLES_DATA
Subscription Accounts Management Roles	ATC_SUBSCR_ACC_ROLES	Delete	ATC_DELETE_SUBSCRIPTION_ACCOUNTS_ROLES_DATA
Subscription Accounts Management Roles	ATC_SUBSCR_ACC_ROLES	View	ATC_VIEW_SUBSCRIPTION_ACCOUNTS_ROLES_DATA
Subscription Accounts Billing Profile	ATC_SUBSCR_ACC_BILL_PROF	Update	ATC_UPDATE_SUBSCRIPTION

Object	Object Code	Data Privilege	Data privilege Code
			<code>_ACCOUNTS_BILL_PROF_DATA</code>
Subscription Accounts Billing Profile	ATC_SUBSCR_ACC_BILL_PROF	Delete	<code>ATC_DELETE_SUBSCRIPTION_ACCOUNTS_BILL_PROF_DATA</code>
Subscription Accounts Billing Profile	ATC_SUBSCR_ACC_BILL_PROF	View	<code>ATC_VIEW_SUBSCRIPTION_ACCOUNTS_BILL_PROF_DATA</code>
Subscription Accounts Asset Relationships	ATC_SUBSCR_ACC_ASSET_REL	Update	<code>ATC_UPDATE_SUBSCRIPTION_ACCOUNTS_ASSET_REL_DATA</code>
Subscription Accounts Asset Relationships	ATC_SUBSCR_ACC_ASSET_REL	Delete	<code>ATC_DELETE_SUBSCRIPTION_ACCOUNTS_ASSET_REL_DATA</code>
Subscription Accounts Asset Relationships	ATC_SUBSCR_ACC_ASSET_REL	View	<code>ATC_VIEW_SUBSCRIPTION_ACCOUNTS_ASSET_REL_DATA</code>

Configure Data Security Policy

You must create a data security policy for the required role.

Here's how you can configure data security policy for a subscription account note:

- Go to **Navigator > Tools > Security Console**.
 - Note:** You require the IT security manager job role to complete the task.
- Click **Administration** tab.
- Click **Manage Database Resources**.
- Search for **zmm_notes** on the Manage Database Resources and Policies page.
- Select the object from the search result and click **Edit**.
- Navigate to Condition tab and click **Create**.
- Enter the following information in the Create Database Resource Condition dialog box and click **Save**.
 - Name: SUBSCRIPTION_ACCOUNT_NOTE
 - Display Name: Access Notes created in Subscription Accounts.
 - Condition Type: SQL predicate
 - SQL predicate: `&TABLE_ALIAS.source_object_code = 'SUBSCRIPTION_ACCOUNT' AND ((VISIBILITY_CODE IN ('INTERNAL', 'EXTERNAL')) OR (VISIBILITY_CODE = 'PRIVATE' AND &TABLE_ALIAS.CREATED_BY = FND_GLOBAL.USER_NAME))`
- Navigate to the Policy tab and click **Create**.
- Enter the following information on the Create Policy dialog box:
 - General Information tab:

- i. Name: Grant on Auto Subscription Account Note
 - ii. Start Date: Select a start date according to the requirements of your organization.
 - b. Role tab:
 - i. Click **Add** and search for the roles you created.
 - ii. Select these roles from the search result and click **OK**.
 - iii. Rule tab:
 - a. Row Set: Multiple Values
 - b. Condition: Access Notes created in Subscription Account.
 - iv. Navigate to the Action tab and move appropriate permissions such as read or update or delete to the **Selected Actions** section for all the objects.
 - v. Click **Save and Close**.
10. Click **Submit**.

5 Manage Standard Lookups

Rename Contact Address Type List of Values

You can rename the contact address type list of values from Business to Work. Here's how you can rename:

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, click the Tasks icon.
3. Click **Search** and look for **Manage Standard Lookups** and click it.
4. Search for **PARTY_SITE_USE_CODE** as the lookup type.
5. Locate the lookup code **Business** and rename its meaning to **Work**.
6. Click **Save and Close**.

Enable Home and Work or Business in Contact Address Type List of Values

You can enable home and work or business in the contact address type list of values. Here's how you can enable:

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, click the Tasks icon.
3. Click **Search** and look for **Manage Standard Lookups** and click it.
4. Search for **PARTY_SITE_USE_CODE** as the lookup type.
5. Add **SALES_CLOUD** tag to the **Home** and **Work or Business** Lookup Code.
6. Click **Save and Close**.

Disable Unsupported Address Types in Contact Address Type List of Values

You can disable unsupported address types in the contact address type list of values. Here's how you can disable:

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, click the Tasks icon.
3. Click **Search** and look for **Manage Standard Lookups** and click it.
4. Search for **PARTY_SITE_USE_CODE** as the lookup type.
5. Disable all the lookup codes except HOME, BILL_TO, BUSINESS, and SHIP_TO.
6. Click **Save and Close**.

Change Address Type List of Values

You can change the address type list of values. Here's how to change the values:

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, click the Tasks icon.
3. Click **Search**, look for **Manage Standard Lookups** and click it.
4. Search for **PARTY_SITE_USE_CODE** as the lookup type.
5. Click **New** and add the following entries:

Lookup Code	Meaning	Enabled	Start Date	Tag
WORK	Work	Checked	Current Date	SALES_CLOUD

6. Add the **SALES_CLOUD** tag to the **HOME**, **WORK**, **BILL_TO** and **SHIP_TO** lookup codes and enable the options.
7. Click **Save and Close**.

6 Manage Profile Options

Manage Profile Options

Use profile options to manage the configuration data centrally and determine how the application must run. For example, you can control some of the user preferences such as navigator appearance, language, date, currency, and other similar settings.

Here's what you can do with the profile options:

- Determine the application and module name at which the profile option takes effect.
- Set a specific value for the profile option.
- Configure how a UI element acts when you change the value of available profile options.

Enable Omnichannel Profile Option

You want to provide fast, reliable assistance to the customers requesting service. One way to speed up that process is the automatic routing of service request work to support agents. If you want the work assignments to be automatically routed to agents, you must enable the Omnichannel profile option.

You must sign in as an administrator to do this task.

1. Go to Navigator > Others > Setup and Maintenance.
2. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Omnichannel profile options
3. In the Manage Omnichannel Profile Options page, click **SVC_ENABLE_OMNI**.
4. Go to the **SVC_ENABLE_OMNI: Profile Values** section, set the Profile Value for Site to **Yes**.
5. Click **Save and Close**.

7 Manage Service Requests

Create a Service Request Category

You must create a service request category for billing adjustment to support the billing adjustment process.

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Service Request
 - o Task: Manage Service Request Categories
3. In the Service Request Categories page, click **Create Category > Create Top-Level Category**.
4. In the Create Level Category dialog box, select the appropriate business unit, and enter the following values.
 - o Category Name: Billing Adjustment
 - o Short Code: ATC_BILLING_ADJUSTMENT
5. When you're done, click **Save**.

Create Service Request Assignment Rules

You can use assignment rules to automatically assign bill adjustment requests to queues. These assignment rules can be run on a schedule.

You must sign in as an administrator to do this task.

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Communication Channels
 - o Task: Manage Service Assignment Rules
3. On the Manage Service Assignment Rules page, select **Service Request Queuing Rules** from the Category drop-down list.
4. In the Rule Sets section, click the Plus icon, and then enter the following information.
 - o Name: Billing Adjustment Queue
 - o Description: DX4C Billing Adjustment Queue
5. To create rules for the rule set, click the Plus icon in the Rules section.
6. In the Create Rule page, enter a name for the rule.
7. In the Conditions section, click the Plus icon to add a condition by and define the required attribute. Enter the following information and select it.

- Object: Service Request
 - Attribute: Category
 - Operator: Equals
 - Value: Search for category short name ATC_BILLING_ADJUSTMENT
8. To add an additional condition, click the Plus icon and enter the following information.
- Object: Service Request
 - Attribute: Status
 - Operator: Equals
 - Value: Search and select Waiting
9. In the Action: Assign Queue section, click the Plus icon to select a queue.
10. In the Select and Add: Queue dialog box, search for, and select a queue.
11. Click **Apply**.
12. Click **Save and Close**.
13. Click **Save and Publish** to publish the assignment rules.

The service request assignment is defined.

Note: You must republish the assignment rules each time the rule is changed. Also republish the rules each time the associated queue is deleted, enabled, or disabled.

Add Waiting Status to Billing Adjustment Service Requests

Billing adjustment service requests that need manager approval are in the In waiting statuses.

To include the service in user-workload management, this status must be added to the list of qualifying status values for workload capacity management. You can use manage capacities task to add the status to workload capacity management.

Sign in as an administrator into the Oracle CX Sales.

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the following:
 - Offering: Service
 - Functional Area: Communication Channels
 - Task: Manage Capacities
3. Select Qualifying Status value corresponding to Service Request.
4. On the Qualifying Status Values page, select Waiting from the No Effect on Workload list. Move the status to the Adds to Workload list to qualify the status as active.
5. Click **Apply**.
6. Click **Save and Close**.

Add Detail Page Link in Service Request List Page

To manage a few categories of service requests like billing adjustment requests, you need specific processes. One such process is a detail page link that directs the users to the specific views and processes for that category.

As an administrator, complete the following tasks to add a detail page in the application.

- Create a sandbox
- Add detail page link
- Publish the sandbox

Create a Sandbox

Here's how you create and activate a sandbox.

1. Click your image or name in the global header, and select Manage Sandboxes. Alternatively, go to **Configuration > Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. On the Create Sandbox page, enter a sandbox name, and click **Create and Enter**.
4. Select the sandbox you just created, and click **Set as Active**.
5. The application displays a bar indicating that the sandbox is active.

Enable Detail Page Link

Here are the steps to add and set up the detail page link to support bill adjustment requests. Sign in to the Oracle CX Sales application as an administrator.

1. Go to **Navigator > Configuration > Application Composer**.
2. Click the Standard object and expand it.
3. Expand Service Requests and click the **Actions and Links** node.
4. On the Service Request: Actions and Links page, click **Actions > Create**.
5. On the Create Action or Link page, do the following:
 - Enter the following information.

Field or Region	Value
Display Label	Enter View Detail. After you enter Test, the Name field automatically displays View_Detail.
Type	Select Link. After you select Link, the Source field automatically shows the URL option selected, and displays it as disabled.

- o In the script body, add the following code snippet.

```
def url =
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('ORA_CRM_UIAPP');
  if (CategoryName == "Billing Adjustment") {url = url + "/crmUI/atcagentcare/vp/atcagentcare/mca/
  main/main-adjustment-request/adjustment-request/adjustment-request-view?SrNumber="+SrNumber;}
  else
  {url = url + "/fscmUI/faces/deepLink?objType=SVC_SERVICE_REQUEST&objkey=srNumber="+SrNumber
  + "&action=EDIT_IN_TAB";
  }
```

6. Save the changes.
7. In the Service Request section, click **Pages > Landing Page Layouts**, click the **Duplicate Landing Page Layout** icon.
8. In the Duplicate Layout dialog box, select Standard Layout as a source layout and provide a name for the layout.
9. Click **Save and Edit**.
10. Click **Edit** in the Service Request List.
11. In the Configure Detail form, select View_Detail from the Available Fields and move it to the Selected Fields
12. Click **Save and Close**.

Publish the Sandbox

Now you can roll out your changes into the application by publishing your sandbox. Here's how.

1. Click your name or image in the global header.
2. Click **Publish** from the drop-down list. Click OK.
3. On the Sandbox Detail page, click **Publish**.
4. On the warning dialog box, click **Continue to Publish**.
5. Wait for the status to be 100 percentage. The sandbox is now published.

8 Manage Data Security Policies for Contact Management

Manage Data Security Policy for Update of Contact and Related Child Objects

You must manage data security policy to enable update of contact and related child objects.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role.

1. Go to **Navigator > Tools > Security Console**.
2. Click **Administration** tab.
3. Click **Manage Database Resources**.
4. Search for **HZ_PARTIES** on the Manage Database Resources and Policies page.
5. Select the object from the search result and click **Edit**.
6. Navigate to Policy tab and click **Create**.
7. Enter the following information on the Create Policy dialog box and click **Save**.

Field	Value
Grant Name	Grant to update contact
Start Date	Current Date
Role Name	ORA_ATC_SUBSCRIPTION_ACCOUNT_MANAGEMENT
Application	crm
Rule Set	Multiple values
Condition	Access the trading community party for table HZ_PARTIES all contacts in the enterprise
Action	Update, Update Sales Party

8. Click **Submit**.

Manage Data Security Policy for Update of Contact Relationship with the Organization

You must manage data security policy to enable update of contact relationship with the organization.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role.

1. Go to **Navigator > Tools > Security Console**.
2. Click **Administration** tab.
3. Click **Manage Database Resources**.
4. Search for **HZ_PARTIES** on the Manage Database Resources and Policies page.
5. Select the object from the search result and click **Edit**.
6. Navigate to Policy tab and click **Create**.
7. Enter the following information on the Create Policy dialog box and click **Save**.

Field	Value
Grant Name	Grant to update contact having a relationship with the accounts
Start Date	Current Date
Role Name	ORA_ATC_SUBSCRIPTION_ACCOUNT_MANAGEMENT
Application	crm
Rule Set	Multiple values
Condition	Access the trading community organization for table HZ_PARTIES for all organizations in the enterprise
Action	Update, Update Sales Party

8. Click **Submit**.

Manage Data Security Policy to Access Home Phones

You must manage data security policy to access home phones.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role.

1. Go to **Navigator > Tools > Security Console**.
2. Click **Administration** tab.
3. Click **Manage Database Resources**.
4. Search for **HZ_CONTACT_POINTS** on the Manage Database Resources and Policies page.
5. Select the object from the search result and click **Edit**.
6. Navigate to Policy tab and click **Create**.
7. Enter the following information on the Create Policy dialog box and click **Save**.

Field	Value
Grant Name	Grant on Trading Community Person Phone
Start Date	Current Date
Role Name	ORA_ATC_SUBSCRIPTION_ACCOUNT_MANAGEMENT
Application	crm
Rule Set	Multiple values
Condition	Access the trading community person phone for table HZ_CONTACT_POINTS for personal phone numbers
Action	Manage Trading Community Person Contact

8. Click **Submit**.

Manage Data Security Policy to Access Home Address

You must manage data security policy to access home address.

Sign in as an administrator and ensure that you have access to the IT Security Manager job role.

1. Go to **Navigator > Tools > Security Console**.
2. Click **Administration** tab.
3. Click **Manage Database Resources**.
4. Search for **HZ_PARTY_SITES** on the Manage Database Resources and Policies page.
5. Select the object from the search result and click **Edit**.
6. Navigate to Policy tab and click **Create**.
7. Enter the following information on the Create Policy dialog box and click **Save**.

Field	Value
Grant Name	Grant on Trading Community Person Address
Start Date	Current Date
Role Name	ORA_ATC_SUBSCRIPTION_ACCOUNT_MANAGEMENT
Application	crm
Rule Set	Multiple values
Condition	Access the trading community person address for table HZ_PARTY_SITES for personal addresses
Action	Manage Trading Community Person Address

8. Click **Submit**.

9 Integration with External Applications

Create Configuration API and Billing and Revenue Management Roles

You must create configuration API roles.

To access the configuration APIs of Oracle Billing and Revenue Management (BRM), sign in as an administrator to create these roles.

1. Go to **Navigator > Tools > Security Console**.
2. On the Roles page, click **Create Role**.
3. On the Create Role: Basic Information page, enter the following values.
 - o Role Name: DX4C_Configuration_Endpoint_Read
 - o Role Code: DX4C_CONFIGURATION_ENDPOINT_READ
 - o Role Category: CRM-Job Roles
4. Click the **Summary train stop**.
5. Click **Save and Close**.
6. On the confirmation dialog box, click OK.

Use the following table to create other configuration API and BRM roles.

Role Name	Role Code	Role Category
DX4C_Configuration_Endpoint_Read	DX4C_CONFIGURATION_ENDPOINT_READ	CRM-Job Roles
DX4C_Configuration_Endpoint_Write	DX4C_CONFIGURATION_ENDPOINT_WRITE	CRM-Job Roles
DX4C_Configuration_Routing_Read	DX4C_CONFIGURATION_ROUTING_READ	CRM-Job Roles
Billing Agent	BILLING_AGENT	CRM-Job Roles
Billing Viewer	BILLING_VIEWER	CRM-Job Roles

Note: For the Billing Agent role, you must add the ORA_ATC_BILLING_CARE_AGENT_DUTY and ORA_ATC_BILLING_CARE_VIEWER_DUTY duty roles in the roles hierarchy. For the billing viewer role, you must add the ORA_ATC_BILLING_CARE_VIEWER_DUTY duty role in the roles hierarchy.

Billing and Revenue Management Calls Redirection

The POST or PATCH calls of Billing and Revenue Management passes through an internal proxy adapter to enable cache clearing mechanism.

In case, you don't want to route calls through the internal adapter, then you must add the header **Target-System:<Spoke System>** to the REST request.

Integrate Address Verification Cloud Service with CX Industries Framework

Here are steps to integrate Address Verification Cloud Service with CX Industries Framework:

Configure IDCS

Here's how you can configure:

1. Create an IDCS user in IDCS federated with DaaS.
2. Add following roles to the created user:
 - o DATASERVICE_CLIENT_API_APPID
 - o DATASERVICE_USER
3. The user names should be the same in both IDCS (CX Industries Framework and DaaS).
 - a. Click **Oracle Cloud Services** tab, in the Application Roles section, users are assigned to the following roles:
 - DATASERVICE_CLIENT_API_APPID
 - DATASERVICE_USER
 - DATASERVICE_ADMINISTRATOR
4. Click **Applications** tab, click **Configuration**. Create an application with the following client configuration:
 - a. In the Client Configuration section, Select **Register Client** option.
 - b. Select the required options such as Resource Owner, Client Credentials, Refresh Token, and Authorization Code corresponding to **Allowed Grant Types**.
 - c. Select **Allow non-HTTPS URLs** option and provide appropriate value for **Redirect URL**.
 - d. For **Client Type**, select **Trusted**.
 - e. In the Token Issuance Policy section, for **Authorized Resources**, select **Specific**.
 - f. In the Resources section, select **Register Resources**.
 - g. In the Configure application APIs that need to be `OAuth` protected section:
 - **Access Token Expiration** is set to a value such as 3,600 seconds.
 - **Refresh Token Expiration** is set to a value such as 604,800 seconds.
 - For **Primary Audience** field, enter the primary recipient where the token is processed.

5. Click **Applications** tab, click **Users**.

The users are listed.

Configure CX Industries Framework

Register the API

```
https://<host>:<port>/admin/apis
Method: POST
Payload
{
  "api-name": "api",
  "api-version": "v3",
  "api-id": "orcl-303",
  "api-root-resources": [
    "address"
  ],
  "api-events": [],
  "openapi-document-url": ""
}
```

Create System Descriptors (TTD)

```
https://<host>:<port>/admin/systemDescriptors
Method: POST
Payload
{
  "target-name": "Address Verification",
  "external": {
    "offered-apis": [
      {
        "api-id": "orcl-303",
        "api-name": "api",
        "api-version": "v3",
        "url-prefix": "av",
        "api-resources": [
          "address"
        ]
      }
    ]
  },
  "system": "AddressVerify",
  "domain": "AddressVerify"
}
```

Create Connection Descriptors (TIC)

```
https://<host>:<port>/admin/connectionDescriptors
Method: POST
Payload
{
  "system-descriptor": "<TTD id>",
  "endpoint-name": "address-verify-api",
  "endpoint-url": "<DAAS API>",
  "fabric-facing-auth": {
    "oidc-client-credentials": {
      "client-id": "<Client Id>",
      "client-secret": "<Client Secret>",
      "identity-uri": "<IDENTITY_URI>",
      "scope": "<Scope>" //Default Scope is urn:opc:idm:__myscopes__
    }
  },
  "type": "external"
}
```

```
}
```

Apply Routing Rules

```
https://<host>:<port>/admin/gatekeepingRules/<gkr>
Method: PUT
Payload
{
  "endpoint-name": "address-verify-api",
  "rule-name": "Generated gatekeeping rule for endpoint address-verify-api",
  "external-event-emitter-identification": "<Client Id>",
  "gatekeeping-apis": [
    {
      "api-id": "orcl-303",
      "api-name": "api",
      "api-resources": [
        {
          "gatekeeping-criteria": {
            "criteria": "*",
            "rank": 50
          },
          "resource-name": "address"
        }
      ],
      "api-version": "v3"
    }
  ]
}
```

Test the Configuration

```
https://<host>:<port>/api/api/v3/address/verify
Method: POST
Headers:
x-id-datSERVICE-user: datauser

Payload:
{
  "inputs": [
    {
      "Address1": "london",
      "Address2": "Shanfrfrfkar V",
      "City": "Srinagarffff",
      "Postalcode": "sssssss"
    }
  ]
}
```

For more information on CX Industries Framework, see CX Industries Framework (My Oracle Support Document ID 2720527.1).

Enable Address Verification and Address Search

You must enable address verification and address search.

Enable Address Verification in the Agent Care Application

Change Tenant Configuration `AddressVerificationCloudService` from enable: 'false' to enable : 'true'.

Note: Enable address verification in the Agent Care application only after integrating address verification API with CX Industries Framework.

Enable Address Search in the Agent Care Application

Search address functionality is available only to customers that have DaaS subscription. It must be configured using the **Manage Integration with Oracle Data as a Service** setup task. Here's how you can configure:

1. Go to **Navigator > My Enterprise > Setup and Maintenance**.
2. In Setup and Maintenance, click **Tasks > Search** and enter **Manage Integration with Oracle Data as a Service** in the Search field.
3. Add the following details on the Manage Integration with Oracle Data as a Service page:
 - o Select Basic Authentication.
 - o Enter URL, user name, and password details.
4. Click **Save and Close**.

Oracle Retail Order Broker Integration Prerequisites

Prerequisites include creating an application and creating requesting location in Oracle Retail Order Broker, and updating tenant configuration.

Create an Application in Oracle Retail Order Broker for Integration

Here's how you can create an application in Oracle Retail Order Broker for integration:

1. Go to **Oracle Retail Order Broker** application.
2. Click **System**.
3. Click **Manage External Application Access**.
4. Click **New Client** button.
5. Select **Application Type** as **External** and enter appropriate value for Application Description.
6. Click **Generate Client**.
7. Copy the client ID and Secret, paste it in a text file for reference.

Note: Client ID and Secret generated in the steps must be shared with the provisioning team for TMF687 adapter deployment.

8. Click **Done**
9. Click **Edit Access** in the created application.
10. Select **Locate**.
11. Click **OK**.

Create Requesting Location for Agent Care and Update Tenant Configuration

For Oracle Retail Order Broker webservice call, `requesting_location` is required. You must create a location for agent care application client in the Oracle Retail Order Broker application.

1. Here's how you can create a location:

- a. Click **Locations** under Locations tab.
 - b. Select the appropriate organization, select **Type** as **Retail Store**. Enter appropriate value for Location and Name. Select **XSTORE** as **system** and click **New**.
 - c. Provide values for all required fields and click **Save**.
2. Update tenant configuration `buyingConfigurations.salesCatalog.inStorePickup.relatedParty` with the location created in step 1.
3. Update tenant configuration `buyingConfigurations.salesCatalog.inStorePickup.mileRangeUnit` with the unit of distance configured in the Oracle Retail Order Broker.

See Oracle Maps Cloud home page for more information.

Integrate Flytxt with CX Industries Framework

Here's how you can integrate Flytxt with CX Industries Framework:

Create SystemDescriptors (TTD)

```
https://<host>:<port>/admin/systemDescriptors
Method: POST
Payload
{
  "target-name": "flytxt-api",
  "external": {
    "apis": [
      {
        "api-id": "flytxt-101",
        "api-resources": [
          {
            "resources": [
              {
                "resource-id": "customers-api"
              },
              {
                "resource-id": "recommendations-api"
              }
            ]
          }
        ],
        "api-version": "v2"
      }
    ],
    "system": "flytxt",
    "domain": "flytxt"
  }
}
```

Create Connection Descriptors (TIC)

```
https://<host>:<port>/admin/connectionDescriptors
Method: POST
Payload
{
  "system-descriptor": "<TTD ID>",
  "endpoint-name": "flytxt-api",
  "endpoint-url": "<FLYTXT_ENDPOINT_URI>",
```

```
"fabric-facing-auth": {  
  "oidc-client-credentials": {  
    "client-id": "<CLIENT_ID>",  
    "client-secret": "<CLIENT_SECRET>",  
    "identity-uri": "<IDENTITY_URI>",  
    "scope": "<SCOPE>"  
  }  
},  
"type": "external"  
}
```

Create Gatekeeping Rule

```
https://<host>:<port>/admin/gatekeepingRules/<gkr-id>  
Method: PUT  
Payload  
{  
  "id": "<GKR Id>",  
  "endpoint-name": "flytxt-api",  
  "rule-name": "Generated gatekeeping rule for endpoint flytxt-api",  
  "external-event-emitter-identification": "<CLIENT_ID>",  
  "destination-selection": [  
    {  
      "api-id": "flytxt-101",  
      "api-version": "v2",  
      "criteria": [  
        {  
          "rank": 1,  
          "resource-ids": [  
            "customers-api",  
            "recommendations-api"  
          ]  
        }  
      ]  
    }  
  ]  
}
```


10 Configure CTI

Enable Redwood User Interface

Ensure that the Redwood user interface is available on the environment. This setup is required to simulate a call for agent assistance.

Add Redwood User Interface for Service Promotion

Verify that the Redwood User Interface for Service promotion is available in the environment.

1. Login to the application as an administrator.
2. Go to **My Enterprise > Enterprise**.
3. Click **Manage Promotion Codes**.
4. On the Manage Promotion Codes page, verify whether the **Redwood User Interface for Service** promotion is available.

If this promotion isn't available, then click **Enter Promotion Code**.

5. Contact Oracle Support to get the promotion code.

Enter the promotion code that you receive.

6. Click **Save and Close**. The **Redwood User Interface for Service** promotion is now shown on the page.
7. Click **Done** on the Manage Promotion codes page.

Enable Redwood User Interface

Follow these steps to enable the Redwood User Interface:

1. Go to **My Enterprise > Offerings**.
2. On the Offerings page, select the **Service** offering.
3. Click **Opt In Features**.
4. On the Opt In page, enable the **Redwood User Interface** for Service task.
5. Click **Features**.
6. Enable the **Enable Redwood User Interface for Service** feature.

Verify that all the sub-features are also enabled.

7. Click **Done**.

Related Topics

Configure CTI

You must sign in as an administrator to configure the media toolbar, application classification and screen pop up.

Configure Media Toolbar

As an administrator, you can configure the vertical media toolbar. The media toolbar is displayed in the following ways:

- If the company has enabled partner Computer Telephony Integration (CTI) service.
- When the signed-in user has access privileges to a toolbar.

While configuring the toolbars, you can also configure the incoming call notification window. The notification window displays basic details about the incoming call.

Note: As an administrator, you can configure multiple media toolbars, and specify a default.

Here's how you can configure the media toolbar.

1. Go to **Navigator > Others > Setup and Maintenance**.
2. In the Setup and Maintenance work area, click the Tasks icon.
3. Select Search and enter **Manage Media Toolbar Configuration**.
4. Click the **Manage Media Toolbar Configuration** link.
5. On the Manage Media Toolbar Configuration page, click Add New to add a toolbar. Enter a name for the toolbar.
6. From the Status options, select Enabled to make the toolbar active. If a default toolbar is already specified, this field is disabled by default.
7. Select the Redwood layout. The layout is selected as Embedded (Horizontal) by default.
8. Enter the domain name. This configuration entry will help you in URL redirection. If you enter the domain name in the Domain Name field, then the application allows cross-origin requests from hosts within the same primary domain or any sub-domain.
9. In the Settings section, Enter the CTI customer URL.
10. Select the recently added toolbar from the list of toolbars and click Default to set the toolbar as a default one for all the enabled users.
11. Click **Save** or **Save and Close**.

Configure Profile Options to Enable Partner Media Toolbar

The profile option `SVC_PARTNER_MEDIA_TOOLBAR_ENABLED` controls the visibility of the partner media toolbar. If you don't enable the profile option, the partner media toolbar is hidden. You can either set this profile option either at a site level or at a user level.

For more information, see the Configure Profile Options to Enable Partner Media Toolbar topic in the Implementing B2B Service guide.

Set Up Pop-Up Windows

Follow these steps to set up pop-up windows for the Agent Care application.

1. Go to Setup and Maintenance work area.
2. Search for **Manage Screen Pop Configuration**.
3. Click **Lookup Filters** on the Screen Pop Configuration page.

4. Go to the row corresponding to `LOOKUPSET` and click the duplicate button.
5. Click **Confirm** to create a duplicate `LOOKUPSET` entry.
6. Add the following:

Name	Application Classification	Active	Description
CARELOOKUPSET	AGENT CARE	Checked	LookupSet for Care

7. Verify to ensure that contact filters are available under `CARELOOKUPSET : FILTERS`
If not, add them manually.
8. Click **Save** or **Save and Close**.

Available Predefined Tokens

Predefined tokens are available in the Tokens section of the Manage Screen Pop Configuration page.

Page	Token
Assisted Customer Enquiry	SVMCA_AGENT_CARE_ASSISTED_CUSTOMER_ENQUIRY
Billing Dashboard	SVMCA_AGENT_CARE_BILLING
Customer 360 Dashboard	SVMCA_AGENT_CARE_DASHBOARD
Order Dashboard	SVMCA_AGENT_CARE_ORDER

11 Configure Digital Assistant

Set Up Oracle Identity Cloud Service for Authentication of Self Service Client Application

You can configure Identity Cloud Service for authenticating your Self Service Client Application for Digital Experience for Communications.

Here's how you can configure:

1. Sign in to Oracle Identity Cloud Service (IDCS) as an administrator.
2. Click **Navigation Drawer** and expand **Security** list.
3. Click **IDP Policies**.
4. Click **Add**.
5. In the **Policy Name** field, enter a policy name, such as ODA Policy, and click **Next** icon.
6. On the **Add Identity Provider Roles** page, click **Add Rules** button.
7. In the **Rule Name** field, enter a rule name such as ODA Rule, then click **Assign Identity Provider** field and select an identity provider.
Select **user-password** to use Oracle Identity Cloud Service.
8. Click **Save**.
9. Click **Next** icon.
10. On the Apps page, click **Assign Apps** button to add the Digital Experience for Communications Self Service Client Application.
11. Select the application and click **OK**.
12. Click **Finish** to complete and save the settings.

Set Up Redirect URL in Oracle Identity Cloud Service

Configure the redirect URL to access your digital assistant environment.

1. Find your Oracle Digital Assistant URL using details in the Access Your Pre-Provisioned Digital Assistant Environment topic in the Related Topics section and then append `/connectors/v2/callback` Record this redirect URL.
Record this redirect URL which will be in the following format: `https://<domain>:<port>/connectors/v2/callback`
2. Sign in to Oracle Identity Cloud Service (IDCS) as an administrator.
3. On the IDCS console, click **Navigation Drawer > Applications**.
4. Search for **DX4C Self Service Client Application**.
5. Click **Edit**.
6. Click **Configuration** and then **General Information**.
7. Record the Client ID and Client Secret. You will use this when setting up the IDCS endpoint.
8. Go to **Client Configuration**.
9. Set the redirect URL that you had recorded in step 1.
10. Click **Save**.

Set Up Oracle Fusion Service

Create Users

Here you're going to configure user categories for proxy user and then create proxy users.

Set Up User Categories for proxy Users

You can configure proxy users to have different password expiry policy. We recommend this because it ensures that the regular password expiry rules don't apply to proxy users. To achieve this, you must create user categories for proxy users.

Here you'll create a category, that's specific to proxy users. These categories use password policies that don't expire passwords.

1. Sign in to your service application as an administrator.
2. Go to the Security Console work area and click **User Categories**.
3. Click **Create**.
4. On the **User Category: Details** page, click **Edit**.
5. In the **User Category Name** field, enter a name. This name could be ProxyUsers.
6. Click **Save and Close**.
7. Click **Password Policy**, and then click **Edit**.
8. Enter appropriate information for proxy user password policy.
Note: We recommend that you set up the **Days Before Password Expiration** to a high number, such as 1500. This gives sufficient time before the password expiry warning.
9. Click **Save and Close**.
10. Click **Done**.

Create Proxy Users

It is recommended to create your proxy user accounts:

1. Sign in to your service application as an administrator.
2. Go to the Security Console work area and click **Users**.
3. Click **Add User Account**.
4. Add three separate users one at a time and grant them roles:
 - a. From the User Category drop-down list, select **ProxyUsers**.
 - b. Fill in the First Name, Last Name, and Email fields.
Note: The User Name field has the default value of the email address user name. Overwrite that in the next step.
 - c. In the User Name field, select one of the entries in the tables PUDS_CSS_USER, PUDS_CSS_ADMIN, or PUDS_ANONYMOUS_USER.
 - d. Enter a password and confirm the password.
Note: Passwords must be at least eight characters long.

- e. Click **Add Role**.
- f. In the Search field, enter the value listed in the Roles Granted column of the following table that corresponds to the user that you created.
- g. When the role is found, click **Add Role Membership** and click **Done**.
- h. Click **Save and Close** and repeat these steps for each of the three users you must create.

We recommend that you use the following codes when creating proxy user accounts.

User	Roles Granted	Role Code
PUDS_CSS_USER	Communications Customer Self-Service Viewer Proxy User	ORA_ATC_COMMUNICATIONS_CUSTOMER_SELF_SERVICE_VIEWER_PROXY_USER_ABSTRACT
PUDS_CSS_ADMIN	Communications Customer Self-Service Manager Proxy User	ORA_ATC_COMMUNICATIONS_CUSTOMER_SELF_SERVICE_MANAGER_PROXY_USER_ABSTRACT
PUDS_ANONYMOUS_USER	Customer Self-Service Proxy Anonymous User	ORA_SVC_CUSTOMER_SELF_SERVICE_PROXY_ANONYMOUS_USER
selfregistration_admin	Sales Administrator	ORA_ZBS_SALES_ADMINISTRATOR_JOB

Set Up Profile Options for Self-Service Optimization

Here's how you can set up the profile options.

1. Sing in to your service application as an administrator.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Digital Customer Service
 - o Task: Manage Digital Customer Service Profile Options
3. Set up the following profile options:

<code>FND_IDP_PROXY_USER_WHITELIST</code>	Default value is None.	New values are <code>PUDS_CSS_USER</code> , <code>PUDS_CSS_ADMIN</code> , and <code>PUDS_ANONYMOUS_USER</code>	Identify the list of allowed proxy users.
<code>ORACLE.ADF.VIEW.ALLOWED_ORIGINS</code>	Default value is None.	New value is * or specific comma-separated domain names.	Lists the trusted domains that can make requests.

<code>CORS_ACCESS_CONTROL_ALLOW_HEADERS</code>		New values are <code>Puds-Access-Token</code> , <code>kmauthtoken</code> , <code>content-language</code> , <code>X-Oracle-ABCS-SessionId</code> , <code>X-Oracle-ABCS-UserId</code>	Specifies a comma-separated list of headers that are allowed as part of a CORS request.
<code>SVC_CSS_USER_ROLE_COMMON_NAME</code>	Default value is <code>ORA_SVC_CUSTOMER_SELF_SERVICE_USER_ABSTRACT</code>	New value is <code>ORA_ATC_COMMUNICATIONS_CUSTOMER_SELF_SERVICE_VIEWER_USER_ABSTRACT</code>	Copy of a Customer Self-Service User with additional privileges added.
<code>SVC_CSS_ACCT_ADMIN_ROLE_COMMON_NAME</code>	Default value is <code>ORA_SVC_CUSTOMER_SELF_SERVICE_ACCOUNT_ADMINISTRATOR_ABSTRACT</code>	New value is <code>ORA_ATC_COMMUNICATIONS_CUSTOMER_SELF_SERVICE_MANAGER_USER_ABSTRACT</code>	Copy of a Customer Self-Service Account Administrator with additional privileges added.
<code>SVC_CSS_USE_FA_AS_IDP</code>	Default value is True.	New value is False.	
<code>SVC_CSS_PUDS_CACHE_DURATION</code>	Default value is 15.	New value is integer in minutes, example 10.	Determines the amount of time, in minutes, that Self-Service Optimization objects are cached.

Set Up Oracle Identity Cloud Service Endpoint

Here you'll set up Oracle Identify Cloud Service endpoint, client ID, and client secret.

Set Up Oracle Identify Cloud Service Endpoint

Follow these steps to enable back-end communications with Oracle Identity Cloud Service.

1. Sign in to your service application as an administrator.
2. In the Setup and Maintenance work area, click **Tasks** and then click **Manage Setup Content**.
3. Click **Manage Integration of Additional Applications**.
4. In the Search Results region, click **Create** from the Actions menu.
5. On the Create Application Integration page, enter the following:
 - o Application name: `IDCS_REST_ENDPOINTAPP`
 - o Full URL: For example: `https://<IDCS HOST>/admin/v1`. This is the IDCS host that authenticates the user.
 - o Partner Name: `IDCS`
6. Click **Apply**, and then verify the protocol, server host, and context root.
7. Click **Save and Close**.

Set Up Client ID and Client Secret

Here you'll set up client ID and client secret that comes from your IDCS application.

1. Sign in to your service application as an administrator.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Digital Customer Service
 - o Task: Manage Client Credentials for Proxy User Data
3. On the Manage Client Credentials for Proxy User Data page, enter client ID and client secret.
Get the client ID and client secret that you recorded in the Set Up Redirect URL in Oracle Identity Cloud Service topic.
4. Test the validity of the information you have entered.
5. Click **Save and Close**.

Manage Proxy User Configuration Data

Here you'll manage all the URLs that are needed to reach your service application through the proxy user data service.

Here's how you configure the endpoints:

1. Sing in to your service application as an administrator.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Digital Customer Service
 - o Task: Manage Proxy User Configuration Data
3. Here's how you configure self-service user access for subscription accounts:
 - a. In the Search Results region, click **New**.
 - b. Add the following URL pattern: `/crmRestApi/resources/./*/subscriptionAccounts`
 - c. Click the drop-down list and add the **Get** and **Options** HTTP methods.
 - d. Set priority as 1.
 - e. Click the drop-down list and select the **Communications Customer Self-Service Viewer User** role.
 - | **Note:** This is the same user role from Identity Cloud Service.
 - f. Add the **PUK#_SELF_SERVICE_USER** proxy user key.
 - g. Click **Active**.
 - h. Click **Save and Close**.
4. Ensure that the following resources are on the allowed list on the predefined configuration data note:
 - o categories
 - o catalogProductItems
 - o catalogProductGroups

- o productGroupHierarchies
- o fndStaticLookups
- o selfRegistrations
- o chatAuthenticate
- o dynamicLinkPatterns

You can expose user-defined objects to Anonymous users even though they're not on the allowed list.

5. Here's how you add objects:
 - a. In the Search Results region, click **New**.
 - b. Add URL pattern.
 - c. Add HTTP method.
 - d. Select the appropriate user role.
 - e. Add the **PUK#SELF_SERVICE_USER** proxy user key.
 - f. Click **Active**.
 - g. Click **Save and Close**.

Proxy user configuration data is cached for a duration specified by the SVC_CSS_PUDS_CACHE_DURATION profile option. If this value is changed then the cache is cleared. For changes made using this UI to be available immediately, you must change the value of the SVC_CSS_PUDS_CACHE_DURATION profile option. We recommend that you add or subtract 1 minute from the existing value.

Set Up Proxy User Credentials

Here's how you'll set up user credentials for the proxy users.

1. Sign in to your service application as an administrator.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Service
 - o Functional Area: Digital Customer Service
 - o Task: Manage Proxy User Configuration Data
3. Search for these proxy user keys:
 - o PUK#_ANONYMOUS_USER
 - o PUK#_SELF_SERVICE_USER
 - o PUK#_SELF_SERVICE_ACCOUNT_ADMIN
4. Perform these steps for the proxy user keys:
 - a. Select the proxy user key and click **Edit**.
 - b. In the **Edit Proxy User Configuration Data** workspace, enter the proxy user name if it's different from the default name. We recommend that you retain the proxy user names.
 - c. Enter password for the proxy users.
 - d. Click **Save and Close**.

Because the same proxy user key is used by multiple URLs, you can edit any one of the URLs that use this proxy user key to set the proxy user credentials associated with that key. The proxy user configuration data is cached for a duration specified by the `SVC_CSS_PUDS_CACHE_DURATION` profile option.

Set Up Digital Assistant

Access Your Digital Assistant Environment

Here you'll set up access privileges for yourself and your team to the Oracle Digital Assistant that has been provisioned for you. For details, see the Related Topics section.

Set Up Access for Digital Assistant

You set up your team members' access to Digital Assistant through Oracle Identity Cloud Service. To get there, you first need to sign in to your Oracle Cloud Account with your existing cloud administrator sign in credentials.

Confirm Synchronization

An IDCS application is set up to represent your Oracle CX instance. This IDCS application is essentially an intermediary to synchronize your user accounts between Oracle CX and Digital Assistant. In this section, you'll confirm that the user accounts are indeed synchronized.

Navigate to the IDCS Application for Digital Assistant

An IDCS application is also set up for you to manage access to Digital Assistant.

Assign Yourself and Other Administrators the ServiceAdministrator Role

You'll want to assign the ServiceAdministrator role to yourself and possibly a few other people. This will grant you full privileges within the Digital Assistant, including a number of capabilities, such as viewing detailed audit information and purging data, that developers and business users don't need.

Assign Your Developers the ServiceDeveloper Role

Assign the ServiceDeveloper role to users that will be working with the Digital Assistant instance to extend and configure the FADigitalAssistant and any of the skills that it encompasses.

Assign Business Users the ServiceBusinessUser Role

The ServiceBusinessUser role is available for users who need to evaluate the digital assistant and skills and evaluate how they're being used.

Get the Digital Assistant Instance URL

Get the URL for Digital Assistant so that you can bookmark it and share it with your developers.

See the related links section for description and procedures. Ensure that you replace HCM with Oracle CX.

Related Topics

Set Up a Web Channel

Here you'll create a channel in Digital Assistant that exposes your digital assistant in the Oracle Cloud CX user interface.

Get the Latest DX4C Digital Assistant

When an instance of Oracle Digital Assistant that's paired with an Oracle Cloud CX instance is provisioned, it's automatically populated with the latest digital assistant named DX4CDigitalAssistant. Because the digital assistant is updated periodically, ensure that you use the latest version.

1. Go to Oracle Digital Assistant using the URL that you set up.
2. Sign in to Oracle Cloud.
3. Click **Development > Digital Assistants**.
4. In the **DX4CDigitalAssistant** tile, click **Install Update**, and then click **Update**.

If the latest version of the digital assistant isn't available, then you need to get that version from the Skill Store. Here's how you do that:

1. In **Digital Assistant** click **Development > Store**.
2. In the **DX4CDigitalAssistant** tile, click **Pull** and then confirm.

Train the Digital Assistant

Here's how you can train the digital assistant:

1. In Oracle Digital Assistant, select the side menu, and click **Development > Digital Assistants**.
2. Open the **DX4CDigitalAssistant** tile.
3. Click **Train**.
4. Ensure that the value of Train is **Trainer Tm**.
5. Click **Submit**.

Set Up a Web Channel and Connect it to DX4C Digital Assistant

Here's how you configure a web channel:

1. In Oracle Digital Assistant, select the side menu and click **Development > Digital Assistants**.
2. Click **Add Channel**.
3. On the **Create Channel** page, enter the following information and click **Create**:
 - o Enter a name for the channel.
 - o Select **Oracle Web** as the channel type.
 - o Enter an asterisk (*) in the allowed domains field.

It indicates that these are mandatory fields.
 - o Ensure that **Client Authentication Enabled** is disabled.

Set Up Authentication Service and Framework

Here you'll set up authentication service and CX industries framework.

Set Up Authentication Service

Here's how you set up authentication services for the ODA bot.

1. In the Digital Assistant, click **Settings > Authentication Services**.
2. Click **Add Service**.
3. Enter **IDCS_OAuthForFabric** as the name.
4. Enter the token endpoint URL as `https://<IDCS-Service-Instance>.identity.oraclecloud.com/oauth2/v1/token`
5. Enter the authorization endpoint URL as `https://%3cIDCS-Service-Instance%3e.identity.oraclecloud.com/oauth2/v1/authorize`
6. Enter the client ID and the client secret.

Note: You had recorded this when setting up the redirect URL in Oracle Identity Cloud Service. For more information, see step 7 of Set Up Redirect URL in Oracle Identity Cloud Service topic.

7. Add these scopes:
 - o `<Industries Framework URL>urn:opc:resource:consumer::all`
 - o `<Industries Framework URL>urn:opc:resource:consumer::SelfService`

Note: When you have multiple values for scopes, separate them by using space in between them.

8. Enter **sub** as the subject claim.

Set Up CX Industries Framework

For the digital assistant to be able to communicate with the Oracle CX instance, it needs to use the REST endpoint for that instance. That endpoint is specified in a custom parameter.

1. In the Digital Assistant, click **Development > Digital Assistants**.
2. Select the **DX4C Digital Assistant** digital assistant.
3. Go to the **Skills** tab.
4. Set the value of the `da.FabricEndpoint` parameter to `https://<fabric-host>/api/`.

12 Extend Care Experience

Extend Care Experience: Overview

You can configure the contact center application using the Oracle Visual Builder Studio application. Oracle Visual Builder Studio is an application development platform that helps you to develop an application extension and manage the entire development lifecycle, from creation to publication.

Here are the extension points available:

- **Dynamic Forms and Tables:** Enables extensions to add, remove, reorder, or change the rendering of fields.
- **Dynamic Containers:** Enables extensions to insert content and to add, remove, or reorder base application content.
- **Constants, Variables, and Types:** Extensions can override base application constants or read and write to variables made available by the base application. User-defined types can also be made available for use by extensions.
- **Events:** Enables extensions to trigger base application behaviors or to respond to events initiated by the base application.
- **App UIs (New Flows):** Extensions can define new app UIs in which they can create new UI flows that are either linked from or embedded within existing pages.

Embed Third-Party Payment Vendor Page in Checkout Workflow

You can extend care checkout flow to initiate a third-party payment page beyond the care application.

You can embed third-party payment vendor pages in checkout process flow. You can do this by creating a new template and adding to the existing dynamic container rule set for the cart checkout.

Create and Publish an App Extension

Here's how you can create and publish an app extension:

1. Open the Settings and Actions menu by clicking your user image or name in the global header.
2. Click **Edit Pages** in Visual Builder to open the page in the VB Designer in Oracle Visual Builder Studio. VB Designer opens in a new browser tab in the context of the Fusion Applications page.
3. If the Visual Builder detects only one available app extension project and workplace, it will auto select the project and workspace during the process. If there are multiple options available then you must select the appropriate project and workspace.

Note: The navigator lists the apps extensible dynamic UIs and pages. By default, the filter displays extensible artifacts only.

Duplicate Dynamic Container for Adding New Payment Gateway Template

Here's how you can duplicate dynamic container:

1. In the Application Extensions, select **Contact Center > Application > Flows > Main Flows > Cart > Cart-Checkout** where you can integrate payment gateway.
2. Click **Dynamic Container > Container Rule set 1 > Layout for Cart Checkout** from dynamic components.
3. Duplicate the built-in template **Case 1** as **Case 1 (Copy)**.
4. Click **Add** icon in the section and select **New Template**.
5. In the Create Template dialog box, enter the ID and title for the new template such as `paymentGateway`.
6. Click **Code**.
7. In the new template, here's the code to enter:

```
<!-- Dynamic Container Templates -->
<template id="paymentGateway">
<oj-bind-if test="[[ $base.flow.variables.enablePaymentOptions &&
  $functions.enablePaymentOptions($base.variables.placeOrder,
  $base.variables.isConfigured, $base.variables.commitmentCartItem,
  $base.flow.variables.enablePaymentOptions) === false]]">
<div class="oj-flex oj-sm-12 oj-sm-margin-3x-top oj-sm-padding-3x-horizontal">
<!-- Payment Options -->
<div class="oj-flex-item oj-flex oj-sm-8 oj-sm-padding-4x-bottom oj-sm-padding-2x-end">
<div role="list" data-oj-context="true" class="oj-sm-12 oj-cxi-cart">
<oj-sp-expandable-list-item class="oj-flex-item"
item-title="Payment Options"
item-subtitle="Enter a valid payment method"
icon.class="oj-ux-ico-deposits"
icon.alt-text="Payment Options"
badge="[[{'text': !$base.variables.isConfigured.paymentInfoConfigured ? 'Required' : 'Configured',
  'status':
  $base.variables.isConfigured.paymentInfoConfigured ? 'success' : 'info'}]]"
expanded="{ { $base.flow.variables.cartCheckoutExpandObj['payment-options'] } }"
on-sp-before-detail-collapse="[[ $listeners.paymentOptionsSpBeforeDetailCollapse]]"
id="payment-options" on-sp-before-detail-expand="[[ $listeners.paymentOptionsSpBeforeDetailExpand]]">
<div id='paymentContent'>
<div class="oj-sm-padding-4x">
<h2 id="paypalHeading" value="Paypal container"></h2>
<div id="paypal-button-container"></div>
</div>
</div>
</oj-sp-expandable-list-item>
</div>
</div>
</div>
</oj-bind-if>
</template>
```

Implement PayPal Buttons

Here's how you can implement PayPal buttons:

1. Click **Javascript** and enter the following code.
2. Use the CLIENT_ID of PayPal application.

```
define(['https://www.paypal.com/sdk/js?client-id=CLIENT_ID'], function() {
  'use strict';
  var eventHelper;
  var shoppingCartPrice = '0.00';
  var PageModule = function PageModule(context) {
    eventHelper = context.getEventHelper();
```



```
};
// jQuery(document).ready(checkPaypal);
function checkPaypal () {
if($('#paypal-button-container').is(':visible')) {
var FUNDING_SOURCES = [
paypal.FUNDING.CREDIT,
paypal.FUNDING.CARD
];
FUNDING_SOURCES.forEach(function(fundingSource) {
// Initialize the buttons
var button = paypal.Buttons({
fundingSource: fundingSource,
createOrder: function(data, actions) {
return actions.order.create({
purchase_units: [{
amount: {
value: shoppingCartPrice
}
}]
});
},
// Finalize the transaction
onApprove: function(data, actions) {
return actions.order.capture().then(function(details) {
// Show a success message to the buyer
if (details.intent === 'CAPTURE' && details.status === 'COMPLETED') {
eventHelper.fireCustomEvent('/page:assignPaymentDetails', { "details": { 'id' :
details.purchase_units[0].payments.captures[0].id } });
}
});
}
});
// Check if the button is eligible
if (button.isEligible() && document.getElementsByClassName('paypal-buttons-context-iframe').length ===0)
{
// Render the standalone button for that funding source
button.render('#paypal-button-container');
}
} else {
setTimeout(checkPaypal, 50);
}
}
/**
 * @param {String} arg1
 * @return {String}
 */
PageModule.prototype.setTotalPrice = function (cart) {
var totalPrice = 0;
cart.forEach(cartPrice => {
if (cartPrice.priceType === 'oneTime') {
totalPrice += cartPrice.price.taxIncludedAmount.value;
}
});
shoppingCartPrice = totalPrice.toFixed(2);
console.log("shoppingCartPrice: "+shoppingCartPrice);
};
PageModule.prototype.enablePaypal = function () {
checkPaypal();
};
PageModule.prototype.enablePaymentOptions = function (placeOrder, isConfigured, commitmentCartItem,
paymentOptions) {
let disablePaymentOptions;
if(!placeOrder && isConfigured.contactInfoConfigured && isConfigured.shippingInfoConfigured) {
if (Object.keys(commitmentCartItem).length > 0 && !isConfigured.commitmentTermsConfigured) {
```

```
disablePaymentOptions = true;
} else if (paymentOptions && isConfigured.paymentInfoConfigured) {
disablePaymentOptions = true;
} else {
disablePaymentOptions = false;
if (!document.getElementById('paypal-button-container') || (document.getElementById('paypal-button-
container') && document.getElementsByClassName('paypal-buttons-context-iframe').length ===0)) {
checkPaypal();
}
}
} else {
disablePaymentOptions = true;
}
return disablePaymentOptions;
};
/**
 *
 * @param {String} arg1
 * @return {String}
 */
PageModule.prototype.updateExpandCollapseObj = function (action, expandObj, itemKey) {
Object.keys(expandObj).forEach(expandObjKey => {
if(action === 'expand') {
expandObj[expandObjKey] = expandObjKey === itemKey? true : false;
} else if(action === 'collapse') {
expandObj[expandObjKey] = false;
}
});
return expandObj;
};
/**
 * Scroll/Focus to the expanded section
 * @param element id to focus/scroll to view
 * @return true
 */
PageModule.prototype.expandListItemScrollIntoView = function (itemKey) {
var element = document.getElementById(itemKey);
element.scrollIntoView();
return true;
};
return PageModule;
});
```

Set Shopping Cart Price Required for PayPal

Here's how you can set the shopping cart price required for PayPal:

1. Create new `EventListener` ON `vbEnter` and click **Next**.
2. Create new page action chain as `setTotalPrice`.
3. Go to action chain `setTotalPrice` and add new step as `General - Call` function.
4. Select function as `setTotalPrice` and pass the `$base.flow.variables.cartTotalPrice` parameter value.
5. Click **Page Designer** and go to HTML code of `paymentGateway`, the dynamic container template.
6. Click **Components > Get Components**.
7. Search for `oj-sp-expandable-list-item` and install it.
8. Click **Events** tab of `Expandable List Items`.
9. Click **New Event > New Custom Event**. Expand **Expandable List Item Events**.
10. Select `spBeforeDetailCollapse` and select `New` `actionChain`.
11. In the action chain, add variables `itemKey` and `pageType`, and set to enabled.
12. Add `Call` function to the action chain. Select `updateExpandCollapseObj` function.
13. Pass parameters

```
[
  "collapse",
  "{{ $base.flow.variables.cartCheckoutExpandObj }}",
  "{{ $variables.itemKey }}"
]
```

14. Add **Assign Variables**, select `$base.flow.variables.cartCheckoutExpandObj` as target and source as `$chain.results.callFunctionUpdateExpandCollapseObj`
15. Go to HTML code, assign input parameters to new event.

```
{
  "itemKey": "{{ $event.target.id }}",
  "pageType": "checkout"
}
```

16. Repeat steps 8 to 11 for the `spBeforeDetailExpand` event.
17. Add Call function to the action chain, select `updateExpandCollapseObj` function.
18. Pass parameters

```
[
  "expand",
  "{{ $base.flow.variables.cartCheckoutExpandObj }}",
  "{{ $variables.itemKey }}"
]
```

19. Add **Assign Variables**, select `$base.flow.variables.cartCheckoutExpandObj` as target, and source as `$chain.results.callFunctionUpdateExpandCollapseObj`
20. Add Call function and select `expandListItemScrollIntoView` function.
21. Pass parameters

```
[
  "{{ $variables.itemKey }}"
]
```

22. Go to HTML code, assign input parameters to new event.

```
{
  "itemKey": "{{ $event.target.id }}",
  "pageType": "checkout"
}
```

Here's the code to enter:

```
{
  "description": "",
  "variables": {},
  "types": {},
  "eventListeners": {
    "paymentOptionsSpBeforeDetailCollapse": {
      "chains": [
        {
          "chainId": "ExpandableListItemSpBeforeDetailCollapseChain",
          "parameters": {
            "itemKey": "{{ $event.target.id }}",
            "pageType": "checkout"
          }
        }
      ]
    },
    "paymentOptionsSpBeforeDetailExpand": {
      "chains": [
```

```

{
  "chainId": "ExpandableListItemSpBeforeDetailExpandChain",
  "parameters": {
    "itemKey": "{{ $event.target.id }}",
    "pageType": "checkout"
  }
}
],
},
"vbEnter": {
  "chains": [
    {
      "chainId": "setTotalPrice",
      "parameters": {}
    }
  ]
},
"events": {},
"imports": {},
"chains": {
  "ExpandableListItemSpBeforeDetailCollapseChain": {
    "description": "",
    "root": "callFunctionUpdateExpandCollapseObj",
    "actions": {
      "callFunctionUpdateExpandCollapseObj": {
        "module": "vb/action/builtin/callModuleFunctionAction",
        "parameters": {
          "module": "[[ $functions ]]",
          "functionName": "updateExpandCollapseObj",
          "params": [
            "collapse",
            "{{ $base.flow.variables.cartCheckoutExpandObj }}"
          ],
          "source": "{{ $variables.itemKey }}"
        ]
      }
    },
    "outcomes": {
      "success": "assignVariables"
    }
  },
  "assignVariables": {
    "module": "vb/action/builtin/assignVariablesAction",
    "parameters": {
      "$base.flow.variables.cartCheckoutExpandObj": {
        "source": "{{ $chain.results.callFunctionUpdateExpandCollapseObj }}"
      }
    },
    "auto": "always"
  }
},
"variables": {
  "itemKey": {
    "type": "string",
    "input": "fromCaller"
  },
  "pageType": {
    "type": "string",
    "input": "fromCaller"
  }
},
"ExpandableListItemSpBeforeDetailExpandChain": {
  "description": "",
  "root": "callFunctionUpdateExpandCollapseObj",
  "actions": {
    "callFunctionUpdateExpandCollapseObj": {

```

```

"module": "vb/action/builtin/callModuleFunctionAction",
"parameters": {
"module": "[[ $functions ]]",
"functionName": "updateExpandCollapseObj",
"params": [
"expand",
"{{ $base.flow.variables.cartCheckoutExpandObj }}",
"{{ $variables.itemKey }}"
]
},
"outcomes": {
"success": "assignVariablesCartCheckoutExpandObj"
}
},
"assignVariablesCartCheckoutExpandObj": {
"module": "vb/action/builtin/assignVariablesAction",
"parameters": {
"$base.flow.variables.cartCheckoutExpandObj": {
"source": "{{ $chain.results.callFunctionUpdateExpandCollapseObj }}",
"auto": "always"
}
},
"outcomes": {
"success": "callFunctionExpandListItemScrollIntoView"
}
},
"callFunctionExpandListItemScrollIntoView": {
"module": "vb/action/builtin/callModuleFunctionAction",
"parameters": {
"module": "[[ $functions ]]",
"functionName": "expandListItemScrollIntoView",
"params": [
"{{ $variables.itemKey }}"
]
}
},
"variables": {
"itemKey": {
"type": "string",
"input": "fromCaller"
},
"pageType": {
"type": "string",
"input": "fromCaller"
}
}
},
"setTotalPrice": {
"root": "callFunctionSetTotalPrice",
"description": "",
"variables": {},
"actions": {
"callFunctionSetTotalPrice": {
"module": "vb/action/builtin/callModuleFunctionAction",
"parameters": {
"module": "[[ $functions ]]",
"functionName": "setTotalPrice",
"params": [
"{{ $base.flow.variables.cartTotalPrice }}"
]
}
}
}
}
},

```

```

"addLayouts": {
  "containerLayout1-rule1": {
    "expression": "case1"
  }
},
"addSubLayouts": {
  "containerLayout1": {
    "case1": {
      "layoutType": "container",
      "label": "Case 1 (Copy)",
      "layout": {
        "displayProperties": [
          "section2",
          "section1",
          "paymentGateway"
        ],
        "sectionTemplateMap": {
          "section1": "/contentPane",
          "section2": "/headerTemplate",
          "paymentGateway": "paymentGateway"
        }
      }
    }
  },
  "chainRules": {
    "containerLayout1": {
      "rules": [
        "containerLayout1-rule1"
      ]
    }
  },
  "addTemplates": {
    "paymentGateway": {
      "title": "Payment Gateway",
      "description": "",
      "extensible": "byReference",
      "@dt": {
        "type": "section",
        "layout": "containerLayout1"
      }
    }
  },
  "dependencies": [
    "oj-sp/expandable-list-item/loader"
  ]
}
}
}

```

13 Manage Tenant Configuration

Configure Tenant

Tenant configuration is a REST service available to manage business configuration for the care application.

1. To view existing configuration:
 - a. Request URL: `<fabric-host>/admin/tenantConfigurations`
 - b. Operation: `GET`
 - c. Authorization: `OAuth2.0`

Use bearer token generated from `<FA-Host>/fscmRestApi/tokenrelay?scope=<Fabric-Host>`

2. To edit the configuration, get the response using GET call and update the required configuration and do a PUT operation to the same endpoint with the whole object as payload.
3. Here are the business configurations available by default:

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	assets	visible	true/false	"true"	Controls if asset tiles are rendered on the dashboard
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	assets	inActiveTimePer	No of months	"3"	
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	billUnitBalance	visible	true/false	"true"	Controls if bill unit tiles are rendered on the dashboard
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	billUnitBalance	count	a valid positive number	"6"	Controls number of bill unit tiles that are rendered on the dashboard
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	serviceRequests	visible	true/false	"true"	Controls if service request tiles are rendered on the dashboard inside the filmstrip

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	serviceRequests	count	a valid positive number	"6"	Controls number of service request tiles that are rendered on the dashboard inside the filmstrip
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	orders	visible	true/false	"true"	Controls if order tiles are rendered on the dashboard inside the filmstrip
unspecifiedDashb	Controls how tiles are rendered on the unspecified dashboard for an agent	orders	count	a valid positive number	"6"	Controls number of order tiles that are rendered on the dashboard inside the filmstrip
billingDashboard	Controls how tiles are rendered on the customer billing dashboard for an agent	billHistory	limit	a valid positive number	"6"	Controls number of months considered for displaying bill history on billing dashboard
billingDashboard	Controls how tiles are rendered on the customer billing dashboard for an agent	paymentHistory	limit	a valid positive number	"6"	Controls number of months considered for displaying payment history on billing dashboard
billingDashboard	Controls how tiles are rendered on the customer billing dashboard for an agent	bills	visible	true/false	"true"	Controls if bill tiles are rendered on the billing dashboard
billingDashboard	Controls how tiles are rendered on the customer billing dashboard for an agent	serviceRequests	visible	true/false	"true"	Controls if service request tiles are rendered on the billing dashboard
billingDashboard	Controls how tiles are rendered on the customer billing dashboard for an agent	serviceRequests	count	a valid positive number	"6"	Controls number of service request tiles that are rendered on the billing dashboard inside the filmstrip
billingDashboard	Controls how tiles are rendered on the customer	accountReceivab	visible	true/false	"true"	Controls if A/R tiles are rendered

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
	billing dashboard for an agent					on the billing dashboard
billingDashboard	Controls how tiles are rendered on the customer billing dashboard for an agent	accountReceivab	count	a valid positive number	"6"	Controls number of adjustment tiles that are rendered on the billing dashboard inside the filmstrip
dashboardSpotlig	To enable/disable churn propensity	churnPropensity	visible	false/true	false	
dashboardSpotlig	To enable/disable offer recommendations	offerRecommend	visible	false/true	false	
dashboardSpotlig	To enable/disable offer recommendations	offerRecommend	limit	a valid positive number	3	
targetUrls	Controls navigation targets for link clicks on UI	serviceRequestL	target	A valid Service Request List page URL with host value or placeholder	"https://{{host}}/fscmUI/faces/deepLink?objType=SVC_SERVICE_REQUEST"	Controls Service Request List page navigation
targetUrls	Controls navigation targets for link clicks on UI	contactDetailPa	target	A valid Contact detail page URL with host value and id value or placeholders	"https://{{host}}/crmUI/faces/FuseOverview?fndGlobalItemNoFOUNDATIONPARTI CONTACTS_CRM_CARD&fndTaskItemNodeFOUNDATIONPARTI CONTACTS_CRM&fnd=;subTabName%253BContactPar	Controls Contact Detail page navigation
targetUrls	Controls navigation targets for link clicks on UI	serviceRequestE	target	A valid Service Request edit page URL with host value and id value or placeholders	"https://{{host}}/fscmUI/faces/deepLink?objType=SVC_SERVICE_REQUEST&objKey=IN_TAB"	Controls Service Request Edit page navigation
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property	currencyThresho	positiveThresho	A valid positive amount	1	Adjustment requires manager approval if positive adjustment

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
	is a business configuration					exceeds this amount
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property is a business configuration	currencyThresho	negativeThresho	A valid negative number	-1	
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property is a business configuration	Data	positiveThresho	A valid positive number	1	
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property is a business configuration	Data	negativeThresho	A valid negative number	-1	
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property is a business configuration	SMS	positiveThresho	A valid positive number	1	
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property is a business configuration	SMS	negativeThresho	A valid negative number	-1	
adjustmentThresh	Controls agent thresholds for adjustments made in application. This property is a business configuration	Talk	positiveThresho	A valid positive number	1	
adjustmentThresh	Controls agent thresholds for adjustments made in application.	Talk	negativeThresho	A valid negative number	-1	

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
	This property is a business configuration					
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	adjustmentReason	ORA_ATC_NOT_SATISFIED_SERVICE	A valid lookup value in billing system	1	
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	adjustmentReason	ORA_ATC_CHARGE_UNAWARE	A valid lookup value in billing system	2	
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	adjustmentReason	ORA_ATC_DEBIT_MISTAKE	A valid lookup value in billing system	3	
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	adjustmentReason	ORA_ATC_SUPPORT_CHARGES	A valid lookup value in billing system	4	
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	adjustmentReason	ORA_ATC_SERVICE_CHARGES	A valid lookup value in billing system		
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	disputeReasons	ORA_ATC_NOT_SATISFIED_SERVICE	A valid lookup value in billing system		
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	disputeReasons	ORA_ATC_CHARGE_UNAWARE	A valid lookup value in billing system		
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	disputeReasons	ORA_ATC_DEBIT_MISTAKE	A valid lookup value in billing system		

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	disputeReasons	ORA_ATC_SUPPORT_CHARGES	A valid lookup value in billing system		
brmConfiguration	Mapping between adjustment reason lookup value in oracle sales cloud and billing system	disputeReasons	ORA_ATC_SERVICE_CHARGES	A valid lookup value in billing system		
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	cancelSubscript	effectivity	immediate/ endOfBillingCyc	immediate	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	cancelSubscript	numberOfMonths	4		Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	startType	ORA_ATC_IMMEDIATE_EFFECTIVITY / ORA_ATC_DATE_EFFECTIVITY / ORA_ATC_NEXTCYCLE_EFFECTIVITY	ORA_ATC_IMMEDIATE_EFFECTIVITY	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	endType	ORA_ATC_END_FIXED_PERIOD / ORA_ATC_END_SPECIFIC_DATE	ORA_ATC_END_FIXED_PERIOD	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	reason	ORA_ATC_SERVICE_ON_HOLD /ORA_ATC_NOT_USING_SERVICE / ORA_ATC_ON_VACATION /ORA_ATC_OTHER_REASON	ORA_ATC_SERVICE_ON_HOLD	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	defaultPeriod	a valid positive number	1	Controls the effectivity for cancel/suspend/resume subscriptions.

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	minPeriod	a valid positive number	1	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	maxPeriod	a valid positive number	6	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	suspendSubscrip	defaultUnits	ORA_ATC_END_UOM_MONTHS / ORA_ATC_END_UOM_DAYS	ORA_ATC_END_UOM_MONTHS	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	resumeSubscrip	startType	ORA_ATC_IMMEDIATE_EFFECTIVITY / ORA_ATC_DATE_EFFECTIVITY / ORA_ATC_NEXTCYCLE_EFFECTIVITY	ORA_ATC_IMMEDIATE_EFFECTIVITY	Controls the effectivity for cancel/suspend/resume subscriptions.
subscriptionCare	Controls the effectivity for cancel/suspend/resume subscriptions.	resumeSubscrip	reason	ORA_ATC_BACK_FROM_VACATION / ORA_ATC_CHANGED_MIND / ORA_ATC_OTHER_REASON	ORA_ATC_CHANGED_MIND	Controls the effectivity for cancel/suspend/resume subscriptions.
orderCareDashboa	Controls the visibility, Billing and order function for orderActivity , Recent orders.	orderActivity	visible	true/false	true	
orderCareDashboa	Controls the visibility, Billing and order function for orderActivity , Recent orders.	orderActivity	limit	a valid positive number	"30"	

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
orderCareDashboa	Controls the visibility, Billing and order function for orderActivity , Recent orders.	recentOrders	visible	true/false	true	
orderCareDashboa	Controls the visibility, Billing and order function for orderActivity , Recent orders.	recentOrders	count	a valid positive number	"6"	
orderCareSpotlig	Controls the days limit for which orders to be shown.	orders	limit	a valid positive number	"30"	
contactManagemen	Controls how many records are displayed in each section in contact management page. If more records are present, user need to click View All link to see full set of records.	phones	rowLimit	a valid positive number	5	
contactManagemen	Controls how many records are displayed in each section in contact management page. If more records are present, user need to click View All link to see full set of records.	emails	rowLimit	a valid positive number	5	

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
contactManagement	Controls how many records are displayed in each section in contact management page. If more records are present, user need to click View All link to see full set of records.	addresses	rowLimit	a valid positive number	5	
contactManagement	Controls how many records are displayed in each section in contact management page. If more records are present, user need to click View All link to see full set of records.	connectedAccount	rowLimit	a valid positive number	5	
contactManagement	Controls what phone type lov's are supported in Account and contact management and its mapping	phoneType	MOBILE	mobilePhoneNumber	mobilePhoneNumber	
contactManagement	Controls what phone type lov's are supported in Account and contact management and its mapping	phoneType	WORK	workPhoneNumber	workPhoneNumber	
contactManagement	Controls what phone type lov's are supported in Account and contact management and its mapping	phoneType	HOME	homePhoneNumber	homePhoneNumber	

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
generalSettings		billingPeriod	numberOfYears	a valid positive number	"4"	
generalSettings		currencySymbol	placement	before/after	before	Controls if currency symbol need to be placed before or after the number for currency amounts.
generalSettings		serviceSpec	Mobile	TextPS,VoicePS		
generalSettings		serviceSpec	TV	DigitalTVPS		
generalSettings		serviceSpec	TVExtension	HDBoxPS		
generalSettings		useFusionAppsUs	dateTimeFormat	true/false	"true"	Controls if date fields to be displayed as formatted in user preference date format set in oracle sales cloud.
generalSettings		useFusionAppsUs	numberFormat	true/false	"false"	Controls if number fields to be displayed as formatted in user preference number format set in oracle sales cloud.
buyingConfigurat	Gets the phone category based on the customerType	phoneCategory	Residential	Smart%20Phone		
buyingConfigurat	Gets the phone category based on the customerType	phoneCategory	SMB	Smart%20Phone		
buyingConfigurat	Gets the phone category based on the customerType	phoneCategory	Business	Smart%20Phone		
buyingConfigurat	Gets the phone category based on the customerType	phoneCategory	MDU	Smart%20Phone		
buyingConfigurat	Gets the tv category based on the customerType	tvCategory	Residential	TV%20Packages		

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
buyingConfigurat	Gets the tv category based on the customerType	tvCategory	SMB	TV%20Packages		
buyingConfigurat	Gets the tv category based on the customerType	tvCategory	Business	TV%20Packages		
buyingConfigurat	Gets the tv category based on the customerType	tvCategory	MDU	TV%20Packages		
buyingConfigurat	Gets the product offerings having this priceList	priceList	Residential	DX4C%20NA%20Pricelist		
buyingConfigurat	Gets the product offerings having this priceList	priceList	SMB	DX4C%20NA%20Pricelist		
buyingConfigurat	Gets the product offerings having this priceList	priceList	Enterprise	DX4C%20EURO%20Pricelist		
buyingConfigurat	Gets the product offerings having this priceList	priceList	MDU	DX4C%20NA%20Pricelist		
buyingConfigurat	Gets the product offerings having this priceList	priceList	priceListName	DX4C%20NA%20Pricelist	DX4C%20NA%20Pricelist	
buyingConfigurat		maxMobileLines	Residential		5	
buyingConfigurat		maxMobileLines	MDU		1000	
buyingConfigurat		maxMobileLines	SMB		100	
buyingConfigurat		maxMobileLines	Business		5000	
buyingConfigurat	Category name to identify service of the package	mobileCategory	Residential	Mobile	Mobile	
buyingConfigurat	Category name to identify service of the package	mobileCategory	Business	Mobile	Mobile	
buyingConfigurat	Category name to identify service of the package	mobileCategory	MDU	Mobile	Mobile	

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
buyingConfigurat	Category name to identify service of the package	mobileCategory	SMB	Mobile	Mobile	
unspecifiedDashb		orders	limit	30		
orderCareDashboa		orders	limit	30		
AddressVerificat	To enable verification of address entered in ui.	verify	enable		false	
salesCatalog		CustomerType	RES		Residential	
salesCatalog		CustomerType	SMB		SMB	
salesCatalog		CustomerType	ENT		Enterprise	
salesCatalog		CustomerType	MDU		MDU	
salesCatalog		OffersList	limit		20	
salesCatalog		Channel	CC		CH-10010	
salesCatalog		Channel	Online		CH-10001	
salesCatalog		Channel	Retail		CH-10001	
salesCatalog	To give business unit.	salesCatalog	BU		202	
salesCatalog	To give paypal agency code.	salesCatalog	PaypalAgencyId		1	
salesCatalog	To enable/disable in-store pickup.	inStorePickup	enable	false/true	false	
salesCatalog	Check for stores within this mile range.	inStorePickup	mileRangeList	list of valid positive numbers	5,10,20,200	
salesCatalog	Range unit symbol in	inStorePickup	mileRangeUnit	KM/M	M	

Area	Comments	Object	Configuration Key	Configuration Value	Default Value	Comments
	Order Broker system (api).					
salesCatalog	Range unit	inStorePickup	M/Km	Miles/Km	Miles/Km	
salesCatalog	Requesting Location in Order Broker.	inStorePickup	requestingLocat	DX4CCare	DX4CCare	
salesCatalog	Query parameters (type=service, package, device and limit) can be defined as a tenant configuration.	productOfferingTypeParameters		comma separated Offer types like package, device, service and so on.	"service, package, device, accessory"	
			limit	Valid positive number	50	
aggregate	To enable/disable caching of dashboard data.	caching	enable	false/true	false	
serviceRequest	status code meaning mapping	statusCodeMeani	acknowledged	New		
serviceRequest	status code meaning mapping	statusCodeMeani	inProgress	In%20Progress		
serviceRequest	status code meaning mapping	statusCodeMeani	pending	Waiting		
serviceRequest	status code meaning mapping	statusCodeMeani	resolved	Resolved		
serviceRequest	status code meaning mapping	statusCodeMeani	closed	Closed		
InputAddressComp	Gets the usability mode for Input Address Component.	usabilityMode	type	auto, manual	auto	

