Oracle Mobile Sales Assistant User Guide for BlackBerry

Version 2.0

July 2009

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1 About Oracle Mobile Sales Assistant

The Oracle Mobile Sales Assistant application allows you to complete frequent tasks and collaborate with other users. Oracle Mobile Sales Assistant runs on supported BlackBerry devices from Research In Motion, Ltd. (RIM). This guide describes how you can use Oracle Mobile Sales Assistant to be more productive and effective in your everyday tasks.

Optimized for sales professionals, Oracle Mobile Sales Assistant is designed to help you collaborate with your colleagues and customers, complete your frequent tasks, and quickly close business deals while on the road. Oracle Mobile Sales Assistant contains innovative features that provide you with access to both Personal Information Manager (PIM) and Customer Relationship Management (CRM) information, and enables you to work more effectively and collaboratively.

Oracle Mobile Sales Assistant allows you to spend more time away from the office and be closer to your customers. It overcomes the key challenges while you are working remotely, including:

- Limited access to contact and account data
- Insufficient time to complete manual tasks

Oracle Mobile Sales Assistant is ideal for sales representatives whose access is limited to their BlackBerry device while traveling to a meeting or in the field with a customer.

Oracle Mobile Sales Assistant is designed to maximize the following:

- **Usability.** Oracle Mobile Sales Assistant is designed for sales users and is optimized to support frequent tasks in the sales cycle.
- **Mobile technology.** As a smart client, Oracle Mobile Sales Assistant uses Web services to communicate with the Oracle CRM ON Demand Server and contains a cache to maintain data persistence, minimizing interruptions or lost work.
- **Productivity.** Oracle Mobile Sales Assistant maximizes productivity by enabling you to easily find the relevant information at a glance, and quickly complete important activities with fewer clicks.
- **Collaboration.** Use Oracle Mobile Sales Assistant to pass contact and lead information to other contacts, employees, or account team members. Additionally, you can schedule meetings and calls with contacts, employees, account team members, and even account customers, while you are travelling.

2 Installing Oracle Mobile Sales Assistant

This chapter describes how to download and install Oracle Mobile Sales Assistant on your BlackBerry device. It includes the following topics:

Supported BlackBerry Devices

Oracle Mobile Sales Assistant supports the following BlackBerry devices running BlackBerry OS 4.2, 4.3, 4.5, 4.6, and 4.7:

- BlackBerry models 8700, 8700c, 8700g, 8700r, 8703e, 8705g, 8707g, 8800, 8820, and 8830
- BlackBerry Bold model 9000
- BlackBerry Curve models 8300, 8310, 8320, and 8330
- BlackBerry Pearl models 8100, 8110, 8120, 8130, and 8220
- BlackBerry Storm model 9530

Oracle Mobile Sales Assistant accesses data from the following sources:

- Native Personal Information Manager (PIM) data; that is, the contact, calendar, and task data on your BlackBerry device
- Oracle CRM On Demand, Release 15 or later

Requirements for Using Oracle Mobile Sales Assistant

The following are the minimum requirements for using Oracle Mobile Sales Assistant:

- A supported BlackBerry device with the Tasks application installed
- An active data plan for the device

  NOTE: Oracle is not responsible for any data, telephone, or text-messaging charges associated with the active data plan for the BlackBerry device.

For Oracle Mobile Sales Assistant to communicate with Oracle CRM On Demand, you must have the following:

- An Oracle CRM On Demand account

- Web services enabled for your Oracle CRM On Demand installation

  Contact your Oracle CRM On Demand Customer Care representative to set up the Oracle CRM On Demand Web services integration capability for your company. For more information see the topic on setting up Web services for Oracle CRM On Demand in *Oracle Web Services On Demand Guide*. You can access this guide from the Documentation button in the Web Services Administration page in the Oracle CRM On Demand application.

The BlackBerry Maps application is recommended but not required. More information on BlackBerry Maps is at:

http://maps.blackberry.com/

Installing Oracle Mobile Sales Assistant

Complete the steps in the following procedure to install Oracle Mobile Sales Assistant on your BlackBerry device. For a list of the supported devices, see Supported BlackBerry Devices on page 7. Back up your device data before you install Oracle Mobile Sales Assistant.

CAUTION: Do not install Oracle Mobile Sales Assistant on unsupported devices.

To install Oracle Mobile Sales Assistant

1. Open the Web browser on your BlackBerry device and navigate to

   http://mobile.sales.com/

   NOTE: Oracle Mobile Sales Assistant supports only the BlackBerry browser. Do not use third-party Web browsers when installing Oracle Mobile Sales Assistant.

   The Web browser displays the Oracle Mobile Sales Assistant End User License Agreement.

2. Read the Oracle Mobile Sales Assistant End User License Agreement, and select the check box to accept it.
3. Click Next.

   The Web browser displays the download page.

4. Click Install to BlackBerry.
5. Follow the instructions that appear on the device to complete the installation.

   Oracle Mobile Sales Assistant automatically checks for updates. You are prompted to upgrade if a newer version is available.

6. (Optional.) To force a manual check for a newer version, choose Check for newer version from the menu on the Oracle Mobile Sales Assistant Home screen and follow the prompts.

3 Using Oracle Mobile Sales Assistant

This chapter describes how to use the features of Oracle Mobile Sales Assistant. It includes the following topics:

Signing On to Oracle Mobile Sales Assistant

Oracle Mobile Sales Assistant is an application on your BlackBerry device that exchanges data with Oracle CRM On Demand. To access the data stored in Oracle CRM On Demand you must have an account on Oracle CRM On Demand and must sign on using your user ID and password. When you start Oracle Mobile Sales Assistant you are prompted for this authentication information.

The connection from the BlackBerry device to Oracle CRM On Demand can be by Mobile Data Service (MDS), BlackBerry Internet Service, or direct. You can specify one of those methods or choose Automatic, which tries each method in the order listed previously. If you are unsure what type of connection is available on your BlackBerry device, select Automatic, or seek assistance from your BlackBerry administrator.

To sign on to Oracle Mobile Sales Assistant

1. From the Home screen of your BlackBerry device, choose the Oracle Mobile Sales Assistant icon from the menu.

   To display the full list of applications, click the Menu button. The Oracle Mobile Sales Assistant icon may be in the Downloads folder.

2. Enter your Oracle CRM On Demand user name (for example, MyCompany/MyUserId) and password.

   You have to insert a slash (/) between the company name and the user ID.

   NOTE: Initially, the security questions typically required to sign on to Oracle CRM On Demand do not appear on the BlackBerry device. If you have not set up the required security questions, you cannot sign on to Oracle CRM On Demand from the BlackBerry device. In this case, sign on to Oracle CRM On Demand, using a Web browser on your personal computer or laptop computer, and set up the security questions.

3. In the Connect menu, choose a connection method: Automatic, Mobile Data Service (MDS), BlackBerry Internet Service, or Direct.

4. (Optional) You can select Remember My Password so that in future the Sign-On screen does not appear, and you are automatically signed on to Oracle CRM On Demand.

   Oracle Mobile Sales Assistant configures the sign on as a one-time set up.

   To display the Sign-On screen again, return to the Oracle Mobile Sales Assistant Home screen, press Menu, and click Settings.

   To remove a previously stored password or cached data, open the Sign-On screen, press Menu, and then click Reset.

   NOTE: Oracle Mobile Sales Assistant does not support single sign-on (SSO) to Oracle CRM On Demand.

Scenario for Using Oracle Mobile Sales Assistant

Oracle Mobile Sales Assistant can assist you with many of your work tasks. A major design feature of Oracle Mobile Sales Assistant is its ability to drill down on related information and its integration with native BlackBerry capabilities. For example, if you are displaying a customer's information (such as name, address, phone number, and so on) you can call the customer by selecting the phone number, send an email by selecting the email address, or get a map by selecting the address.

The user interface of Oracle Mobile Sales Assistant has been designed around the tasks you perform on a daily basis. In this scenario, you are out of town on a sales trip. After breakfast you use Oracle Mobile Sales Assistant and start with the Today screen. After reviewing the list of today's appointments and tasks, you read a note from your regional supervisor asking you to get purchase estimates from your larger customers.

Returning to the list of today's appointments, you select the first event on the list to display its details (purpose of the appointment, contacts, and so on). This appointment is a phone call with a client in another city to take place in 5 minutes. You select the contact's name to display her details. To make sure you are prepared for the call, you scroll down to the contact's detail listing, select the Activities icon, and browse the activities you have listed for this contact. Next, you return to the Contact screen, select the Notes icon, and read through your notes on this contact, such as the members of her project team and the name of her supervisor. You are ready for the call. You return to the Contact screen, select her phone number, and call her.

When the call is over, Oracle Mobile Sales Assistant prompts you to add new tasks or activities as a follow up to the call.

That done, you return to the Today screen to display your next appointment. You select the appointment item and display its details. The appointment is with a customer in this city. You select the contact's name to display his details. As before, you review your notes and activities associated with this contact. You select his phone number to call him and verify the appointment. After verifying the appointment, you return to the Contact screen, select his work address, and then get the map showing his location. You can then get directions from your current location to his office.

This scenario illustrates some of the links between functions in Oracle Mobile Sales Assistant.

Navigation Features in Oracle Mobile Sales Assistant

Oracle Mobile Sales Assistant works with a variety of BlackBerry devices. The navigation methods vary by device. These navigation methods can be categorized. The categories are based on how the device moves the pointer on the BlackBerry screen:

- Trackwheel (8700 series)
- Trackball (8800 series, Bold, Curve, Pearl)
- Touch screen (Storm)

Table 1 lists the common navigation actions and how to accomplish them using your BlackBerry device.

Table 1. Navigation Methods for BlackBerry Devices

Action	Trackwheel	Trackball	Touch
Move the pointer	For vertical motion, move the trackwheel up or down. For horizontal motion, hold down Alt, and move the trackwheel up or down.	Press the trackball	Drag your finger on the touch screen.
Check or clear a selected check box	Press the trackwheel, or press Enter.	Press the trackball.	Click the check box.

Table 1. Navigation Methods for BlackBerry Devices

Action	Trackwheel	Trackball	Touch
Press a selected button	Press the trackwheel.	Press the trackball.	Click the button.
Move back one screen	Press Escape	Press Escape	Press Escape
Display a menu	Press the trackwheel.	Press Menu	Press Menu
Scroll display	Press the trackwheel	Press the trackball.	Slide your finger up or down the screen.

There are two ways to navigate to a function in Oracle Mobile Sales Assistant: drill down on a field, or use the Shortcut bar. Drilling down on a field refers to activating a link from one function to another. For example, while viewing an appointment you can select a contact's name and display that contact's full information. The Shortcut bar is at the bottom of the Today screen. It contains links to each of the major functions within Oracle Mobile Sales Assistant. For more information on the Shortcut bar, see Accessing Today's Items on page 12.

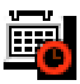
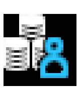
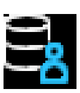
Accessing Today's Items

To display the Today screen, press Escape until the Today screen appears. If you have not yet started Oracle Mobile Sales Assistant, see Signing On to Oracle Mobile Sales Assistant on page 9. The Today screen displays appointments and tasks scheduled for today and their associated contacts. Specifically, the Today list displays the following:

- **Today's Appointments.** Shows appointments that are scheduled for today.
- **Today's Tasks.** Shows incomplete tasks that are due or overdue today.
- **Today's Contacts.** Shows all contacts and users included as participants in today's appointments and tasks.
- **Recent Lookups.** Shows the five most recently viewed records (accounts, contacts, leads, opportunities, or users). This category provides a fast way to return to a record that you were working on previously.

The Today screen includes the Shortcut bar. Table 2 lists the icons in the order in which they appear (left to right) in the Shortcut bar.

Table 2. Shortcut Bar Icons

Icon	Function	Description
	Contacts	Contacts are individuals with whom your company currently conducts business or expects to conduct business with in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. A contact is generally associated with an account, and often, an account record includes links to information about several different contacts at that company. You can display contacts stored in your BlackBerry device, or from Oracle CRM On Demand, or both. For more information, see "Accessing Contacts" on page 14.
	Appointments	Displays your appointments or events. For more information, see "Using Appointments and Calendar" on page 15.
	Tasks	Displays a list of tasks sorted in chronological order by the due date. For more information, see "Tracking Tasks" on page 17.
	Accounts	Accounts are generally companies that you do business with, but you can also track partners, competitors, affiliates, and so on as accounts. For more information, see "Accessing Accounts" on page 18.
	Opportunities	Opportunities are sales deals that, at some point, might be included in revenue forecasting. For more information, see "Accessing Opportunities" on page 19.
	Leads	A lead is a person who has indicated an interest in your products or services. For more information, see "Accessing Leads" on page 20.
	Users	Users are coworkers and partners who are assisting you with your accounts and opportunities. For more information, see "Accessing Users" on page 20.
	Notes	Displays notes and messages. Notes are your notes that are associated with contacts or accounts. Messages are communications transferred through Oracle CRM On Demand between you and your users. For more information, see "Using Notes and the Message Center" on page 21.

Accessing Contacts

To display the Contacts list, drill down on contact information displayed on your screen, or return to the Today screen, and select the Contacts icon from the Shortcut bar.

To find a contact you can use any of the following methods:

- Scroll through the list.
- Use the Search field at the top to display matching contacts. For more information, see Searching for Contacts on page 15.

To display the details of a contact, select the contact’s entry. The details include:

- Name
- Job title
- Account
- Phone numbers (They can include work and mobile.)
- Addresses (They can contact address and account address.)
- Email address

You can do the following actions:

- To call a phone number, select the phone number.
- To display an address on a map, select the address.
- To send an email, select the email address.
- To make changes to a displayed contact, press Menu, and choose Edit.
- To add a contact from the Contact list, press Menu, and choose New.

When adding or editing a contact, you complete the fields in Table 3.

Table 3. Contacts Fields

Field	Method of Entering Data	Comments
First Name and Last Name	Keyboard	The contact’s first and last names.
Account	Account List	Select an existing account from the list.
Job Title	Keyboard	The contact’s job title.
Email Addresses	Keyboard	Enter email address.
Phone Numbers	Keyboard	Enter work or mobile phone number.
Addresses	Keyboard	Edit address. You can edit the contact address when displaying the contact record, but you cannot add addresses.

In addition, the Contact Detail screen has links and buttons, which you can use to display more information:

- **Notes.** Links to a list of notes associated with the contact. You can drill down on each note to get more information.
- **Log a Call.** Select this button to log a call with this contact.
- **Addresses**. Searches Oracle CRM On Demand for additional addresses for this contact.
- **Activities.** Links to a list of activities associated with the contact. You can drill down on each activity to get more information.
- **Share.** Select this button to send this contact's information with others. You can send the information by email or SMS (text message).

Searching for Contacts

When you open the Contacts screen, Oracle Mobile Sales Assistant displays a combined list of up to 100 contacts from Oracle CRM On Demand and contacts from the Contacts application on the BlackBerry device. The icon to the left of the name indicates if the contact name is Remote (a contact from Oracle CRM On Demand) or Local (a contact from the Contacts application on the BlackBerry device).

As you type in the Search field, Oracle Mobile Sales Assistant filters the display to show matching entries. For example, typing *Jo* shows all contacts whose name begins with *Jo*, such as *Joanne, Joe, John,* and *Jordan.*

If the contact you are searching for is not one of the 100 remote contacts on your mobile device, you can connect to Oracle CRM On Demand and search it. To search Oracle CRM On Demand, make sure the cursor is in the Search field and then press Enter. Oracle Mobile Sales Assistant searches Oracle CRM On Demand and returns any matching contacts whom you do not have already on your mobile device. If you do not have Internet access, Oracle Mobile Sales Assistant cannot successfully contact Oracle CRM On Demand and cannot retrieve any additional contacts.

Using Appointments and Calendar

To display your appointments and calendar, return to the Today screen, and select the Appointments icon from the Shortcut bar.

The Calendar screen has two views: List view and Day view. The List view shows your appointments as a continuous list sorted in chronological order and is not limited to just one day's appointments. The Day view resembles a traditional day planner and shows appointments only for the selected day. You can change the selected day by using the left and right arrows on either side of the displayed date.

To view the details of an appointment, select the appointment in either the List or Day view. The details of an appointment include:

- Appointment name
- Location

- Date
- Start time
- End time
- List of participants

If appointment records are deleted from Oracle CRM On Demand outside of Oracle Mobile Sales Assistant, the deleted records continue to be shown until the next time that the data is synchronized.

While viewing an appointment, you can select a participant's name to get more details about the participant, such as phone numbers, address, email address, notes, and so on. For more information on displaying a contact's information, see Accessing Contacts on page 14. You can do the following:

- To make changes to the appointment information, press Menu then choose Edit.
- To add an appointment, press Menu then choose New.
- To save your changes or new record, press Menu and choose Save.

When adding or editing an appointment, complete the fields shown in Table 4.

Table 4. Appointment Fields

Field	Method of Entering Data	Comments
Subject	Keyboard	This field shows the appointment name that appears in the List and Day views
Type	Menu	The menu choices are synchronized with Oracle CRM On Demand.
Location	Keyboard	This field appears in the List and Day view under the Appointment Name
Date	Date/Time Picker	The start date must be before the end date. For more information, see About Appointment Dates on page 17.
Start Time	Menu	The Start time must be before the End time.
End Time	Menu	The End time must be after the Start time.
Participants	Contact List	Each appointment automatically includes you as a participant. For information on adding or deleting participants, see Working with Participants on page 17.
Description	Keyboard	A description of the opportunity and anything else of interest.

NOTE: Oracle Mobile Sales Assistant sends modified appointments to Oracle CRM On Demand when a network connection is available.

To delete an appointment, open the appointment, and press Menu, and then choose Delete.

Working with Participants

To add more participants, select the Participants button, press Menu, click Add Participant, and choose from Account Team, Contacts, Account Contact, or Users. From the list of contacts, select a record.

To delete a participant, edit the appointment record, select Participants, highlight a participant from the list, and choose Delete Participant from the menu.

About Appointment Dates

When Oracle Mobile Sales Assistant synchronizes appointments with Oracle CRM On Demand it filters the appointments that appear on the mobile device. The result is that the mobile device shows appointments ranging from 14 days before the current date to 28 days from the current date. Oracle CRM On Demand keeps a record of all appointments, regardless of their dates.

If you create an appointment on your mobile device that is outside the date filtering range, it remains on your device until you synchronize with Oracle CRM On Demand. When you synchronize data, the date filter is applied, and the appointment is temporarily removed from your mobile device. In future synchronizations, if the appointment is within the date filtering range, it reappears on your mobile device.

Tracking Tasks

To display the Tasks list, drill down on Tasks information displayed on your screen, or return to the Today screen, and select the Tasks icon from the Shortcut bar.

The Task list displays your tasks in chronological order. The order is based on the due date. To view the details of a task, select it. The details of a task include:

- Task name
- Task type
- Due date
- Completed flag
- Assigned to
- Primary contact
- Account name
- Opportunity name
- Description

While viewing a task you can select the contact or account name to get more details, such as the phone numbers, address, email address, notes, and so on. For more information on displaying a contact's information, see Accessing Contacts on page 14. You can do the following:

- To make changes to the task information, press Menu then choose Edit.

- To add a task, press Menu then choose New.
- To save your changes or new record, press Menu and choose Save.

When adding or editing a task, complete the fields in Table 5.

Table 5. Task Fields

Field	Method of Entering Data	Comments
Subject	Keyboard	The name of the task.
Type	Menu	The type of task.
Due	Date Editor	The date when the task is due. For more information, see About Task Event Dates on page 18.
Completed Flag	Check Button	Displayed on the Date Editor. Select either the Complete or Incomplete button.
Assigned To	User List	Tasks are assigned to the person who creates them or you can assign them to another user.
Primary Contact	Contact List	Select the Primary Contact field to display your list of contacts. Choose one contact.
Account	Account List	Select the Account field to display your list of accounts. Choose one account.
Opportunity	Opportunity List	Select the Opportunity field to display your list of opportunities. Choose one opportunity.
Description	Keyboard	Optional text for your own notes.

About Task Event Dates

When Oracle Mobile Sales Assistant synchronizes tasks with Oracle CRM On Demand it filters the tasks that appear on the mobile device. The mobile device does not store tasks older than 28 days from the current date. There is no filtering on future task dates. Oracle CRM On Demand keeps a record of all tasks, regardless of their dates.

Accessing Accounts

To display the Accounts list, drill down on contact information displayed on your screen, or return to the Today screen, and select the Accounts icon from the Shortcut bar.

You cannot add or edit an account in Oracle Mobile Sales Assistant.

To find an account you can use any of the following methods:

- Scroll through the list.

- Use the Search field at the top to filter matching accounts.
- Search Oracle CRM On Demand.

To search Oracle CRM On Demand, you must have Internet access. Start by selecting the Search field. As you type, the locally cached data is filtered and displayed. If none of the locally cached records meets your criteria, press Enter. Oracle Mobile Sales Assistant queries Oracle CRM On Demand for matching entries that you have permission to view.

To display the details of an account, select the account's entry. The details include:

- Account name
- Location
- Phone numbers
- Addresses

You can the following actions:

- To call a phone number, select the phone number.
- To display an address on a map, select the address.
- To send an email, select the email address.

In addition, the Account Detail screen has links that you can use to display more information:

- **Notes.** Displays notes related to this account. You can drill down on each note to get more information.
- **Log a Call.** Select this button to log a call with this account.
- **Addresses**. Searches Oracle CRM On Demand for additional addresses for this account.
- **Activities.** Displays activities that are related to this account. You can drill down on each activity to get more information.
- **Contacts.** Displays a list of contacts associated with the account. You can drill down on each contact to get more information.
- **Account Team.** Displays a list of users who are on the account team. You can drill down on each user to get more information.
- **Share.** Select this button to send this account's information with others. You can send the information by email (in vcard format) or SMS (text message).

Accessing Opportunities

To display the Opportunities list, drill down on opportunity information displayed on your screen, or return to the Today screen, and select the Opportunities icon from the Shortcut bar.

The Opportunities list displays more than just opportunity names. It also displays the projected revenue and probability. You can sort the list using any of those three pieces of information. To switch the sort method, press Menu, and choose Change Sort Order.

To find an opportunity you can search for the name of the opportunity (using the Search field on the left), or for the account name (using the Search field on the right).

To display the details of an opportunity, select its entry.

You can edit and delete opportunities, but you cannot add them. To make changes to an opportunity, display the opportunity's details, press Menu, and then choose Edit.

When editing a contact, complete the fields in Table 6.

Table 6. Opportunity Fields

Field	Method of Entering Data	Comments
Name	Keyboard	The opportunity's name.
Revenue	Number Keyboard	The projected revenue for the opportunity.
Account	Account List	Select an existing account from the list.
Close Date	Date Editor	The date you expect to close the deal.
Sales Stage	Read-Only	Indicates the Sales Stage for the opportunity. This information is read-only and cannot be edited.
Probability	Number Keyboard	The probability that the deal closes as expected.
Forecast	Yes/No	Indicates if the account should be included in the forecast.
Next Step	Keyboard	A note for your reference about the next step in the process.
Description	Keyboard	A description of the opportunity and anything else of interest.

Accessing Leads

To display the Leads list, drill down on the lead information displayed on your screen, or return to the Today screen, and select the Lead icon from the Shortcut bar.

Leads are similar to contacts. For more information on contacts and how to access contact information, see Accessing Contacts on page 14.

Accessing Users

To display the Users list, drill down on user information displayed on your screen, or return to the Today screen, and select the User icon from the Shortcut bar.

Users are similar to contacts, except that the user list is restricted to other users of Oracle CRM On Demand. For more information on contacts and how to access contact information, see Accessing Contacts on page 14.

Using Notes and the Message Center

To display the Note list, drill down on the user note displayed on your screen, or return to the Today screen, and select the Note icon from the Shortcut bar.

Notes can appear in two places in Oracle CRM On Demand: either in the Message Center, or attached to an object, such as an account, contact, or opportunity. Notes that are attached to an object are generally visible to other users who can see the parent object.

The Message Center displays your notes in chronological order, with the most recent notes at the top. To read a note, select its entry. To create a new note, press Menu and choose New.

The first line of the note is its title (maximum of 30 characters). The remaining lines are free-form text (maximum of 4095 characters). To save a note, press Menu and choose Save. You can attach notes to accounts, contacts, and opportunities.

Completing After-Call or Email Activities

When you use Oracle Mobile Sales Assistant to call a contact or user, you can return to Oracle Mobile Sales Assistant by pressing the Escape key. Oracle Mobile Sales Assistant then displays the After Call screen that provides links to the activities appropriate after a call. Table 7 lists these activities.

Table 7. After-Call Activities

Activity	Links to	More Information	Comments
Log Call	Task Edit screen	Tracking Tasks on page 17	Oracle Mobile Sales Assistant creates a new task and fills some of the fields for you automatically, such as the Due date, Assigned to, Primary Contact, Account, and Opportunity. The difference between Log Call and Add Task activity is that the Completed check box is selected when you use Log Call.
Add Task	Task Edit screen	Tracking Tasks on page 17	
Add Appointment	Appointment Edit screen	Using Appointments and Calendar on page 15	Oracle Mobile Sales Assistant creates a new appointment and fills some of the fields automatically, such as Date and Participants fields.
Add Contact	Contact Edit screen	Accessing Contacts on page 14	Oracle Mobile Sales Assistant creates a new contact and fills some of the fields automatically, such as Account.

When you use Oracle Mobile Sales Assistant to email a contact or user, you can return to Oracle Mobile Sales Assistant by pressing the Escape key. Oracle Mobile Sales Assistant then prompts you to log the email. If you accept the prompt Oracle Mobile Sales Assistant creates a new task with the email details and fills some of the fields for you automatically, such as the Due date, Assigned to, Primary Contact, Account, and Opportunity.

About Data Retrieval

Oracle Mobile Sales Assistant works with data from different data sources. It can retrieve data from:

- Oracle CRM On Demand
- Appointments application on the BlackBerry device
- Contacts application on the BlackBerry device
- Tasks application on the BlackBerry device

This topic describes how Oracle Mobile Sales Assistant handles the following data from the sources.

Account Lookup

When you open the Accounts screen, Oracle Mobile Sales Assistant displays a list of up to 100 accounts from Oracle CRM On Demand:

- As you type in the Search field, the account list is filtered. The filter is based on the search term that you enter. Only accounts with a name matching the search term are displayed. This list shows only accounts stored in the local data cache.
- You can select the Search button on the keyboard to search for any matching accounts in Oracle CRM On Demand.

Call Notes

When you create call notes, Oracle Mobile Sales Assistant stores the data only on Oracle CRM On Demand.

Contact Data Edit

When you edit and save a contact record that is stored in both your BlackBerry device and Oracle CRM On Demand, Oracle Mobile Sales Assistant automatically saves the data in both sources.

Contacts Lookup

When you open the Contacts screen, Oracle Mobile Sales Assistant displays a combined list of up to 100 contacts from Oracle CRM On Demand and contacts from the Contacts application on the BlackBerry device:

- To display only contacts from Oracle CRM On Demand, select the CRM button.

- To display only contacts from the Contacts application on the BlackBerry device, select the Local button.
- As you type in the Search field, the contact list is filtered. The filter is based on the search term that you enter. Only contacts with a first name or last name matching the search term are displayed. This list shows only contacts stored in the local data cache and the Contacts application on the BlackBerry device.
- You can press Enter on the keyboard to search for any matching contacts in Oracle CRM On Demand.

Custom Fields

Custom fields are not supported by Oracle Mobile Sales Assistant. You cannot change the fields that are displayed by Oracle Mobile Sales Assistant. If you rename a field in Oracle CRM On Demand, Oracle Mobile Sales Assistant does not show the custom field name.

Opportunity Data

Oracle Mobile Sales Assistant does not support adding opportunities. It Does allow editing of opportunity data, but not the opportunity sales stage.

Tasks or Appointment Data

When you create a task or appointment, Oracle Mobile Sales Assistant automatically saves the data to your BlackBerry device, and prompts you to save the data to Oracle CRM On Demand.

When you view a task or appointment:

- Oracle Mobile Sales Assistant uses the Due Date, Subject and Description when checking if two tasks are the same.
- Oracle Mobile Sales Assistant uses Start Time, End Time, Location and Subject when checking if two appointments are the same.

User Data

Oracle Mobile Sales Assistant does not support adding to or editing user data.

User Lookup

When you use Oracle Mobile Sales Assistant to search for a user, it searches only data in Oracle CRM On Demand.

About Data Caching

Oracle Mobile Sales Assistant maintains a cache of data downloaded from Oracle CRM On Demand. This cache is limited to accounts, appointments, contacts, leads, message center notes, opportunities, tasks, and users retrieved from Oracle CRM On Demand. The purpose of the cache is to let you work with the existing data when a network connection is not available. All cached information is deleted when you remove the Oracle Mobile Sales Assistant application from the mobile device.

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