Oracle Mobile Sales Assistant User Guide for iPhone

Version 1.0, (November, 2008)

The Oracle Mobile Sales Assistant for Apple iPhone application allows you to complete frequent tasks and collaborate with other users. Oracle Mobile Sales Assistant runs on iPhone devices from Apple Inc. This guide describes how you can use Oracle Mobile Sales Assistant to be more productive and effective in your everyday tasks.

This guide includes the following topics:

About Oracle Mobile Sales Assistant for iPhone

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 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.

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

- Limited access to CRM 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 mobile device while traveling to a meeting or at a customer location.

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 small cache to maintain data persistence, minimizing interruptions or lost work.
- **Productivity.** Oracle Mobile Sales Assistant contains a rich, yet simple, task-focused interface. It maximizes productivity by enabling you to easily find relevant information at a glance, and quickly complete important activities with fewer clicks.
- **Collaboration.** Using Oracle Mobile Sales Assistant you can 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 away from the office.

Deploying Oracle Mobile Sales Assistant

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

- Supported iPhone Devices
- Requirements for Using Oracle Mobile Sales Assistant
- Installing Oracle Mobile Sales Assistant

Supported iPhone Devices

Oracle Mobile Sales Assistant supports the Apple iPhone and Apple iPhone 3G running iPhone OS 2.0 or later.

Requirements for Using Oracle Mobile Sales Assistant

The following are the minimum requirements to use Oracle Mobile Sales Assistant:

- A supported iPhone
- 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 iPhone.

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. See the topic on setting up Web services for Oracle CRM On Demand in *Oracle Web Services On Demand Guide* for more information. You can access this guidefrom the Documentation button in the Web Services Administration page in the Oracle CRM On Demand application.

Installing Oracle Mobile Sales Assistant

For a list of the supported devices, see Supported iPhone Devices. Back up your personal device data before you install Oracle Mobile Sales Assistant.

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

You can download and install the Oracle Mobile Sales Assistant client from the Apple App Store. In the iTunes application, navigate to the App Store, search for Oracle Mobile Sales Assistant, and then download it as you would any other purchased application.

Signing On to Oracle Mobile Sales Assistant

To sign on to Oracle Mobile Sales Assistant on the iPhone, tap the Sales icon. Oracle Mobile Sales Assistant loads and then displays its sign-on screen. Enter your Oracle CRM On Demand user name (for example, MyCompany/MyUserId) and password.

The user name entry is a combination of your company name and user account name. It follows this format: AccountName/FirstName

For example: PatLee/Pat

After entering your user name and password, tap Login.

> **NOTE:** The security questions typically required to initially sign on to Oracle CRM On Demand do not appear on the iPhone device. If you have not set up the required security questions, you cannot sign on to Oracle CRM On Demand from the iPhone. 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.

The first time you sign on to Oracle Mobile Sales Assistant (or if you change user names), the initial data download process begins automatically. This process downloads an initial set of accounts, appointments, contacts, leads, message center notes, opportunities, tasks, and users. The initial data download process must be completed before using the other features in Oracle Mobile Sales Assistant.

For convenience, you can store your user name and password by navigating to the Settings screen, and then the Sales screen. When your credentials are stored in the Settings screen, you can access Oracle Mobile Sales Assistant quickly by tapping the Sales icon, without having to enter your user name or password.

After you have signed on, Oracle Mobile Sales Assistant connects to Oracle CRM On Demand and downloads the latest information. It displays the Today screen (for more information on the Today screen, see Using the Today List). Oracle Mobile Sales Assistant retrieves current information from Oracle CRM On Demand and displays information, such as your appointments, today's contacts, tasks, and messages.

Navigation Features in Oracle Mobile Sales Assistant

If you are familiar with navigating other iPhone applications you will find Oracle Mobile Sales Assistant is similar. The following interface elements are present in Oracle Mobile Sales Assistant's implementation:

- A navigation bar is at the top of most screens. This bar displays the current screen's name and when appropriate has buttons either for saving a record or navigating to another screen or record.
- A tab bar is present at the bottom of most screens. This bar contains quick-access buttons to your favorite screens in Oracle Mobile Sales Assistant. You can configure the contents of the Tab bar. For more information, see Customizing the Tab Bar.
- Drilling down on a record in a list displays the detail screen for that record. For example, in a list of contacts you can tap a specific contact record and Oracle Mobile Sales Assistant displays the information for the selected contact.
- Tapping a phone number activates the phone and calls the selected number.
- Tapping an address activates Apple's Maps application to display the address. You can use the Maps application to locate your current position and get directions to the selected address.

Using the Today List

To display the Today list, tap its tab in the Tab bar at the bottom of the screen. If the Today list is not in the Tab bar, tap the More tab and then tap Today.

The Today list displays appointments and tasks scheduled for today and their associated contacts. Specifically the Today list displays:

- **Appointments.** Shows appointments that are scheduled for today.
- **Contacts.** Shows all contacts included as participants in today's appointments and tasks.
- **Tasks.** Shows incomplete tasks that are due or overdue today.
- **Message Center.** Shows the five most recently modified messages in the Oracle CRM On Demand message center.
- **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.

Each category in the Today list might have a number in its title to indicate the quantity of records available. For example, *Message Center (1)* indicates that you have one message.

You can customize the contents of the Today list and the order in which the items appear. To change the Today list, tap the Edit button in the Navigation bar at the top. Oracle Mobile Sales Assistant displays the available categories.

To remove a category from the Today list, drag its switch to the Off position. To re-enable it, drag its switch to the On position.

To change the order of the categories, drag them up or down within the list by using the drag icon (three gray parallel lines) to the right of each category.

When you are finished, tap the Done button in the Navigation bar. Oracle Mobile Sales Assistant displays the Today list with your changes.

Using Appointments and Calendar

To display your appointments and calendar, tap the Calendar tab in the Tab bar at the bottom of the screen. If the calendar is not in the Tab bar, tap the More tab, and then tap Calendar.

NOTE: Oracle Mobile Sales Forecast's calendar is separate from the iPhone's Calendar application. The two calendars do not share information or have any data connectivity between them. Both perform similar functions in similar ways to be consistent.

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 tapping the left and right arrows on either side of the displayed date.

To view the details of an appointment, tap 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 data refresh.

While viewing an appointment you can tap 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.

To make changes to the appointment information, tap Edit.

To add an appointment, tap the plus button () or in Day view, tap any open area.

When adding or editing an appointment, you complete the following fields:

Field	Method of Entering Data	Comments
Subject	Text Keyboard	This is the appointment name that appears in the List and Day views
Location	Text Keyboard	Appears in the List and Day view under the Appointment Name
Start Date	Date/Time Picker	The start date must be before the end date
End Date	Date/Time Picker	The end date must be after the start date
Description	Text Keyboard	Optional text for your own notes.
Participants	Contact List	Each appointment automatically includes yourself as a participant. For information on adding or deleting participants, see Working with Participants.

When you are finished adding or editing an appointment, tap Save.

NOTE: Oracle Mobile Sales Assistant sends modified appointments to Oracle CRM On Demand when a network connection is available. It displays newly created appointments immediately, but you cannot edit these appointments until they are sent to Oracle CRM On Demand.

To delete an appointment, edit the appointment, and tap Delete.

Working with Participants

To add more participants, tap the Participants button, choose from Account Team, Contacts, Customer Contact List, or Users. From the list of contacts, select a record.

To delete a participant, edit the appointment record, tap Participants, tap the minus button, and then tap Delete.

Tracking Tasks

To display the Tasks list, tap its tab in the Tab bar at the bottom of the screen. If the Tasks list is not in the Tab bar, tap the More tab, and then tap Tasks.

The Task list displays your tasks in chronological order, based on their due date. To view the details of a task, tap 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 tap 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.

To make changes to the task information, tap Edit.

To add a task, tap the plus button ( ).

When adding or editing a task, you complete the following fields:

Field	Method of Entering Data	Comments
Subject	Text Keyboard	The name of the task.
Type	Text Keyboard	The type of task.
Due Date	Date Picker	The date when the task is due.
Completed Flag	Check Button	Located on the Date Picker, tap either the Complete or Incomplete button.
Assigned To	Not Editable	Tasks are assigned to the person who creates them.
Primary Contact	Contact List	Tap the Primary Contact field to display your list of contacts. Choose one contact.
Account	Account List	Tap the Account field to display your list of accounts. Choose one account.
Opportunity	Opportunity List	Tap the Opportunity field to display your list of opportunities. Choose one opportunity.
Description	Text Keyboard	Optional text for your own notes.

When you are finished adding or editing a task, tap Save.

Accessing Contacts

To display the Contacts list, tap its tab in the Tab bar at the bottom of the screen. If the Contacts list is not in the Tab bar, tap the More tab, and then tap Contacts.

The top of the Contacts screen has buttons for CRM, Local, and All contacts. To display only the contacts from Oracle CRM On Demand, click CRM. To display only the contacts from the iPhone Contacts application, click Local. To display all contacts, regardless of the source, click All.

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

- Scroll through the list
- Tap a quick access letter on the right to jump to the last names that begin with the selected letter
- Use the Search field at the top to display matching contacts.
- Search Oracle CRM On Demand.

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

To display the details of a contact, tap the contact's entry. The details include:

- Name
- Job title
- Account
- Phone numbers
- Addresses
- Email addresses

These details are active links: tap a phone number to call it. Tap an address and it is displayed in the Map application. Tap an email address and a new email opens with the selected address already entered.

To make changes to a contact, tap Edit.

To add a contact, tap the plus button ( ).

When adding or editing a contact, you complete the following fields:

Field	**Method of Entering Data**	**Comments**
Name	Text Keyboard	The contact's first and last names.
Job Title	Text Keyboard	The contact's job title.
Account	Account List	Select an existing account from the list.
Phone Numbers	Number Keyboard	Enter one or more phone numbers, such as work, mobile, home, and so on.
Addresses	Text Keyboard	Enter one or more addresses, such as work, home, and so on.
Email Addresses	Email Keyboard	Enter one or more email addresses, such as work, mobile, home, and so on.

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

- **Activities link.** Links to a list of activities associated with the contact. You can drill down on each activity to get more information.
- **Notes link.** Links to a list of notes associated with the contact. You can drill down on each note to get more information.
- **Log a Call button.** Tap this button to log a call with this contact.
- **Share button.** Tap this button to share this contact with another user. Pick the user from the user list.
- **Network button.** Tap this button to get a list of social networks (Facebook, Linked In, Naymz, and Spoke) to search for this contact. The search opens in Safari (the iPhone Web browser). Some social networking sites require that you have an account with them before you can search.

Accessing Accounts

To display the Accounts list, tap its tab in the Tab bar at the bottom of the screen. If the Accounts list is not in the Tab bar, tap the More tab, and then tap Accounts.

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

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

- Scroll through the list.
- Use the Search field at the top to display matching accounts.
- Search Oracle CRM On Demand.

To search Oracle CRM On Demand, you must have Internet access. Start by tapping the Search field to display the keyboard. As you type, the locally cached data is filtered and displayed. If none of the locally cached records meets your criteria, tap the Search button. 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, tap the account’s entry. The details include:

- Phone numbers
- Addresses
- Email addresses

These details are active links: tap a phone number to call it. Tap an address and it is displayed in the Map application. Tap an email address and a new email opens with the selected address already entered.

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

- **Contacts link.** Links to a list of contacts associated with the account. You can drill down on each contact to get more information.
- **Account Team link.** Links to a list of users who are on the account team. You can drill down on each user to get more information.

- **Activities.** Links to activities that are related to this account. You can drill down on each activity to get more information.
- **Notes.** Links to notes related to this account. You can drill down on each note to get more information.

Accessing Users

To display the User list, tap its tab in the Tab bar at the bottom of the screen. If the Users list is not in the Tab bar, tap the More tab, and then tap Users.

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.

Accessing Leads

To display the Leads list, tap its tab in the Tab bar at the bottom of the screen. If the Leads list is not in the Tab bar, tap the More tab, and then tap Leads.

Leads are similar to contacts, except that leads are associated with opportunities. For more information on contacts and how to access contact information, see Accessing Contacts.

Accessing Opportunities

To display the Opportunities list, tap its tab in the Tab bar at the bottom of the screen. If the Opportunities list is not in the Tab bar, tap the More tab, and then tap Opportunities.

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, tap the Sort button.

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

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

You can edit and delete opportunities, but you cannot add them. To make changes to an opportunity, tap Edit.

When editing a contact, complete the following fields:

Field	Method of Entering Data	Comments
Name	Text Keyboard	The opportunity's name.
Account	Account List	Select an existing account from the list.
Revenue	Number Keyboard	The projected revenue for the opportunity.
Close Date	Date Picker	The date you expect to close the deal.
Probability	Number Keyboard	The probability that the deal closes as expected.
Next Step	Text Keyboard	A note for your reference about the next step in the process.
Forecast	Switch	Indicate if the account should be included in the forecast.
Description	Text Keyboard	A description of the opportunity and anything else of interest.
Participants	User List	Select the existing users who are participating in working on this opportunity.

Managing Messages and Notes

To display the Message Center (notes), tap the Notes tab in the Tab bar at the bottom of the screen. If the Message Center is not in the Tab bar, tap the More tab, and then tap Notes.

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, tap its entry. To create a new note, tap the plus button ( ).

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, tap Save.

You can attach notes to accounts, contacts, and opportunities.

Customizing the Tab Bar

You can customize which four features appear on the Tab bar at the bottom of the screen. All remaining features are accessible through the More tab. To customize the Tab bar, tap the More tab, and then tap Edit. The Configure screen appears. To replace an existing tab bar selection with a different feature, drag its icon from the top down to the one of the four available tabs. The icons on the top do not move or disappear, they are for permanent reference.

The features available are:

- Accounts
- Calendar
- Contacts
- Leads
- Notes
- Opportunities
- Tasks
- Today
- Users

About Data Retrieval

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

- Oracle CRM On Demand
- The iPhone Contacts application

This topic describes how Oracle Mobile Sales Assistant handles the following data from the two 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 iPhone Contacts application.

  - To display only contacts from Oracle CRM On Demand, tap the CRM button.
  - To display only contacts from the iPhone Contacts application, tap the Local button.
  - As you type in the Search field, the contact list is filtered based on the search term 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 iPhone contacts application.
- You can tap the Search button on the keyboard to search for any matching contacts in Oracle CRM On Demand.

- 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 based on the search term 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 tap the Search button on the keyboard to search for any matching accounts in Oracle CRM On Demand.

- User lookup

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

- Contact data edit

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

- Opportunity or user data edit

  Oracle Mobile Sales Assistant does not support adding or editing of user data. It allows editing of opportunity data (but not the opportunity sales stage), but not adding opportunities.

- Tasks or appointment data

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

  When you view a task or appointment:

  - Use the Due Date, Subject and Description when checking if two tasks are the same.
  - Use Start Time, End Time, Location and Subject when checking if two appointments are the same.

- Call notes

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

- 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 reflect the new field name.
- Description fields are limited to 1998 characters for task, appointment, and opportunity records. You cannot edit records with a description field of 1999 or more characters within Oracle Mobile Sales Assistant.

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 queried 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.

Copyright