

Oracle Mobile Sales Forecast User Guide for iPhone

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The Oracle Mobile Sales Forecast application displays your active opportunities and the relevant data about those opportunities. Oracle Mobile Sales Forecast runs on Apple iPhone and iPod Touch devices. This guide describes how you can use Oracle Mobile Sales Forecast to be more productive and effective in your everyday tasks.

This guide includes the following topics:

- [About Oracle Mobile Sales Forecast for iPhone](#)
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About Oracle Mobile Sales Forecast for iPhone

Optimized for sales professionals, Oracle Mobile Sales Forecast is a utility application designed to do one important job: show you your sales pipeline. With Oracle Mobile Sales Forecast you can display:

- Your active opportunities
- The expected revenue for each opportunity
- The close probability for each opportunity
- The close date for each opportunity
- The total revenue for all your opportunities
- Your expected revenue (the total of revenue multiplied by close probability for each opportunity)

In addition, you can use a variety of conditions to filter which opportunities you display. You can filter:

- Close Date
- Probability
- Revenue

Oracle Mobile Sales Forecast has only two screens:

- **Forecast screen.** Displays your opportunities (for more information, see [Using the Forecast Screen](#))

- **Preferences screen.** Where you set your options and preferences (for more information, see [Setting Options on the Preferences Screen](#))

Deploying Oracle Mobile Sales Forecast

This topic describes how to download and install Oracle Mobile Sales Forecast on your iPhone.

Devices Supported by iPhone OS

Oracle Mobile Sales Forecast supports the Apple iPhone, Apple iPhone 3G, and Apple iPod Touch devices running iPhone OS 2.0 or later.

Requirements for Using Oracle Mobile Sales Forecast

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

- A supported iPhone or iPod Touch
- 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 Forecast 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 guide from the Documentation button in the Web Services Administration page in the Oracle CRM On Demand application.

Installing Oracle Mobile Sales Forecast

For a list of the supported devices, see [Devices Supported by iPhone OS](#). You should back up your device data before you install Oracle Mobile Sales Forecast.

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

The Oracle Mobile Sales Forecast client is available for downloading and installing from the Apple App Store. In the iTunes application, navigate to the App Store, search for Oracle Mobile Sales Forecast, and then download as normal.

The first time you run Oracle Mobile Sales Forecast after an installation you are prompted to agree to an end user license agreement. If you reject the agreement, the application does not proceed and it prompts you to close it. If you accept the agreement, the application continues. You are not prompted again for this agreement unless you reinstall the application.

Signing On to Oracle Mobile Sales Forecast

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

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.

Oracle Mobile Sales Forecast refreshes the data when it launches if it has been more than an hour since the last download.

Using the Forecast Screen

The Forecast screen displays your opportunities according to the preferences set on the Preferences screen. It displays a lot of information in a compact space.

The Forecast screen contains the following elements from top-to-bottom, and left-to-right:

- **Checkboxes.** When checked, the opportunity's revenue is included in the revenue figures at the bottom of the screen.
- **Opportunity Name and Account Name.**
- **Opportunity Information button.** Oracle Mobile Sales Forecast tracks three pieces of information for each opportunity: the close date, revenue, and close probability. Two of the three are listed in the button. To change the order of the information, tap the button.
- **Total Revenue.** This is the sum of the revenue for all checked opportunities.
- **Expected Revenue.** This is the sum of the revenue for all checked opportunities, factoring in the close probability. Expected revenue is calculated as the total of the revenue multiplied by the close probability for each opportunity. This value is displayed as both a number, and as a bar graph, which is displayed as a percentage of the sales quota.
- **Sales Quota.** The sales quota that you entered on the Preferences screen.
- **Refresh button.** This button refreshes the forecast data by connecting to Oracle CRM On Demand and downloading the latest information. Oracle Mobile Sales Forecast refreshes the data when it

launches if it has been more than an hour since the last download. If you make any changes on the Preferences screen, Oracle Mobile Sales Forecast refreshes the data when you return to the Forecast screen.

- **Update Status.** Displays how long since you last refreshed the data.
- **Information Toggle.** Tap the *i* button to display the Preferences screen.

Setting Options on the Preferences Screen

To display the Preferences screen, tap the *i* button at the bottom right of the Forecast screen.

On the Preferences screen you can customize the following:

- [Setting Your User Name and Password](#)
- [Setting the Close Date Filter](#)
- [Setting the Revenue Filter](#)
- [Setting the Require Forecast Flag](#)
- [Setting the Probability Filter](#)
- [Setting the Sales Quota](#)
- [Choosing the Sort Order](#)
- [Choosing Which Opportunities to Show](#)

To return to the Forecast screen, tap the Done button. When you tap Done, Oracle Mobile Sales Forecast refreshes the opportunities listed in accordance with the changes that you made to the preferences. For example, if the minimum revenue was set to \$1,000,000 and you changed that setting to zero, then Oracle Mobile Sales Forecast refreshes the list of opportunities appropriately.

Setting Your User Name and Password

For convenience you can store your user name and password. When your credentials are stored, you can log in quickly by tapping the Forecast icon.

Storing your password is optional. To make the password saving feature available, slide the Password switch to On. For more information on the user name and password, see [Signing On to Oracle Mobile Sales Forecast](#).

Setting the Close Date Filter

The Close Date filter determines which opportunities are downloaded from Oracle CRM On Demand to your iPhone. The Close Date filter has a minimum date and maximum date. Opportunities that have a projected close date on or between those dates are downloaded and displayed.

To change either or both dates, tap the Close Date button on the Preferences screen, and Oracle Mobile Sales Forecast displays a date range picker. Neither date can be blank. The minimum date (earliest is January 1, 1900) must be before the maximum date (latest is December 31, 3000).

Suggestion: Set the date range to your current month, quarter, or sales quota period.

Setting the Revenue Filter

The revenue filter determines which opportunities are downloaded from Oracle CRM On Demand to your iPhone. The revenue filter has optional minimum and maximum settings. Opportunities that have a projected revenue at or between your minimum and maximum settings are downloaded and displayed.

To change the Revenue filter setting, tap the Revenue button on the Preferences screen, and Oracle Mobile Sales Forecast displays a numeric pad. Enter a minimum revenue (lowest is zero) and a maximum revenue (highest is \$9,999,999,999). If the Minimum Revenue field is blank, it is the same as zero. If the Maximum Revenue field is blank, then no restriction is applied.

Setting the Require Forecast Flag

The Require Forecast flag determines which opportunities are downloaded from Oracle CRM On Demand to your iPhone. When the Require Forecast Flag field is set to Yes, only opportunities that have the Forecast Flag set to TRUE are downloaded. When this field is set to No, the value of the Forecast Flag is not considered; opportunities are downloaded regardless of the value of their Forecast Flag.

To change this setting, display the Preferences screen, and tap either Yes or No in the Required Forecast flag field.

Setting the Probability Filter

The Probability filter determines which opportunities are downloaded from Oracle CRM On Demand to your iPhone.

To change this filter, display the Preferences screen and tap the Probability field. Oracle Mobile Sales Forecast displays the following list of choices:

- Show All
- Greater than 10%
- Greater than 20%
- Greater than 30%
- Greater than 40%
- Greater than 50%
- Greater than 60%

- Greater than 70%
- Greater than 80%
- Greater than 90%

Setting the Sales Quota

The sales quota that you set in the Preferences screen displays on the Forecast screen. The Forecast screen displays the sales quota as a numeric value and uses it to set the length of the Expected Revenue bar graph. For example, if the sales quota is \$10,000,000 and the expected revenue is \$5,000,000, then the bar graph is colored up to the half-way point.

To set the sales quota, display the Preferences screen and tap the Sales Quota field. Oracle Mobile Sales Forecast displays a numeric pad. Enter the quota as numbers only. Do not enter commas or decimal points. This value is not sent to Oracle CRM On Demand.

Choosing the Sort Order

The opportunities on the Forecast screen are sorted by one of the following fields:

- Account Name (alphabetically)
- Close Date (earliest date first)
- Opportunity Name (alphabetically)
- Probability (highest to lowest)
- Revenue (highest to lowest)

To change the sort order, display the Preferences screen, and tap the Sort Order field. Oracle Mobile Sales Forecast displays the list of choices.

Choosing Which Opportunities to Show

Similar to the Show filter in Oracle CRM On Demand, you can use the same Show filter to determine which opportunities are downloaded from Oracle CRM On Demand to your iPhone. You can choose between the following:

- All Opportunities
- My Opportunities
- Team Opportunities

As in Oracle CRM On Demand, you must have access to a record to be able to download it. For example, the All Opportunities setting does not download any records that you do not already have the rights to display.

To change the Show setting, display the Preferences screen and tap the Show field. Oracle Mobile Sales Forecast displays the list of choices.

Cumulative Effects of Filtering

When you refresh data on the Forecast screen, Oracle Mobile Sales Forecast requests opportunities from Oracle CRM On Demand. Your settings on the Preferences screen determine which opportunities are downloaded. To download an opportunity it must meet the criteria for all your filter settings. The filter settings are:

- **Close Date.** The opportunity's close date must be on or between the close dates that you set.
- **Revenue.** The opportunity's revenue must be above the minimum value that you set.
- **Require Forecast Flag.** If this flag is set to Yes, then the opportunity's Forecast Flag must be set to TRUE.
- **Probability.** The opportunity's probability must be equal to or more than the value that you set.
- **Show.** Downloads opportunities that match the categories of All Opportunities, My Opportunities, or Team Opportunities.

Because the effect of these filters is cumulative, if the restrictions that you set are too restrictive no opportunities can meet all the criteria and none are downloaded. One strategy is to remove all restrictions, then apply them one at a time until you isolate the opportunities that you want to focus on.

Data Caching

When you do not have a connection to Oracle CRM On Demand, Oracle Mobile Sales Forecast caches the data downloaded from your last connection. Every time you connect, Oracle Mobile Sales Forecast queries Oracle CRM On Demand using the settings for Close Date, Probability, Require Forecast Flag, and Revenue. Only the data that meets your specifications downloads to Oracle Mobile Sales Forecast. If you change the settings and do not have a connection, Oracle Mobile Sales Forecast cannot obtain and display any records other than the ones it already has.

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