

# Oracle® Field Sales/Laptop

Implementation Guide

Release 11i

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**Part No. A87538-02**

This Implementation Guide provides information and instructions to help you implement Oracle Field Sales/Laptop, Release 11i.

This preface explains how the guide is organized and introduces other sources of information that can help you.

## Intended Audience

This guide describes how to set up and configure Oracle Field Sales/Laptop. The intended audience includes system administrators and Oracle implementation consultants. This is not meant to be a user's guide.

- [Related Documentation and Resources](#)

## Related Documentation and Resources

The following documents provide additional information on installing and implementing Oracle CRM products.

### Reference Documentation

#### Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

#### Oracle Applications User's Guide

This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the graphical user interface (GUI) available with Oracle Applications Release 11i.

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## **Oracle CRM Gateway for Mobile Devices Implementation Guide**

This document provides information and instructions to help you install Oracle CRM Gateway for Mobile Devices effectively.

## **Oracles Sales Online Implementation Guide**

This document provides the information necessary to implement Oracle Sales Online.

## **Additional Product-Related Documentation**

### **Oracle CRM Foundation Implementation Guide**

This guide describes set up and configuration tasks for all the foundation components.

## **Documentation Accessibility**

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- [Overview of Field Sales/Laptop Functionality](#)

## **Overview of Field Sales/Laptop Functionality**

Oracle Field Sales/Laptop is an HTML-based application for use by field sales representatives. The Oracle Field Sales/Laptop architecture is built around two basic components from Oracle's Mobile & Embedded Products division; Web to Go and Oracle 8i Lite.

Oracle Field Sales/Laptop functionality includes the following:

### **Customer and Contact Management**

Oracle Field Sales/Laptop provides field sales representatives with a complete customer overview at each stage of the sales process, in both Business to Business and Business to Customer environments. Before contacting a customer, a sales representative can review customer

information including: products installed, outstanding service requests, payment history, key contacts, open opportunities, and specific sales team members assigned to the customer account. Comprehensive customer information allows sales representatives to better manage their customer accounts and to plan each customer interaction more efficiently.

## **Opportunity Management**

Account managers, sales managers, and territory managers can use Oracle Field Sales/Laptop to manage their opportunities.

## **Tasks**

You can manage your tasks from the Activity tab.

## **Home Page**

From the home page you can view the synchronization changes, new opportunities, or customers. Additionally, the synchronization start and end time are displayed.

## **Application Architecture**

The application architecture for Oracle Field Sales/Laptop is as follows:

### **Technology Stack**

Oracle 8i Lite 4.0.0.5.0

Oracle Web to Go 1.3.1.2.0

Oracle Consolidator 4.0.0.3.7

Oracle Business Component for Java (BC4J) 3.2.974

- [Link to Hardware Requirements](#)

## **Hardware Requirements**

Oracle Field Sales/Laptop has the following minimum computer hardware requirements for mobile laptop users:

- Pentium III processor operating at 550 Mhz speed
- 128 MB RAM
- 300 MB of free hard disk memory
- Windows 95, 98 Second Edition, or NT 4.0 (Service Pack 4) operating systems

[Link to Dependencies](#)

## Dependencies

Oracle Field Sales/Laptop requires the following related products and components to be installed and implemented:

- Oracle Sales Online
- Oracle CRM Gateway for Mobile Devices

[Link to Related Products and Components](#)

## Related Products and Components

Oracle Field Sales/Laptop provides functional integration with the following Oracle applications:

- Oracle Marketing Online
- Oracle Sales Online
- Oracle Service
- Oracle TeleSales

## Setting Up Field Sales/Laptop

### Overview

The following sections of this document describe the steps necessary to implement Field Sales/Laptop.

- [Implementation Steps](#)
- [Installing the Application on a Laptop](#)
- [System Administrator and Mobile User Notes](#)

## Implementation Steps

The table below summarizes the necessary steps to successfully implement Field Sales/Laptop. Further information detailing the implementation procedures is provided in the sections following the table.

### Prerequisites

Completion of installation and implementation steps as outlined in the following documents:

- Oracle System Administrator's Guide
- Implementing CRM Applications Release 11i
- Oracle Sales Online Implementation Guide

The following table outlines the implementation steps for Field Sales/Laptop.

**Implementation Steps Summary Table**

<b>Mandatory</b>	<b>Step Number</b>	<b>Oracle Field Sales/Laptop Implementation Steps</b>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 1	Install Oracle Sales Online Release 11i (version 11.5.5) (ARU #1809318) and verify that Sales Online and its prerequisite products and dependencies were properly installed. Reference: <i>Oracle Sales Online Implementation Guide</i>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 2	Check post installation steps on the Applications Database. <ul style="list-style-type: none"> <li>a. Ensure Advanced Replication is installed</li> <li>b. Check for Advanced Queues</li> <li>c. Verify the Unique Global Name</li> <li>d. Modify Oracle Applications Database Parameters</li> <li>e. Run Snapshot Log Creation Scripts</li> <li>f. Set System Profile Option Values</li> </ul> Reference: <i>Oracle CRM Gateway for Mobile Devices Implementation Guide Release 11i</i>

<b>Mandatory</b>	<b>Step Number</b>	<b>Oracle Field Sales/Laptop Implementation Steps</b>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 3	<p>Install the Mobile Device Gateway Database</p> <ol style="list-style-type: none"> <li>a. Create Oracle 8i (8.1.6.1.2) Database for MDG</li> <li>b. Set <code>init.ora</code> parameters</li> <li>c. Create an ADMIN user and tablespaces</li> <li>d. Copy the <code>asgmtran.jar</code> file from the applications file system in the enterprise machine into the MDG database</li> <li>e. Configure Net 8</li> <li>f. Verify Unique Global Name</li> </ol> <p>Reference: <i>Oracle CRM Gateway for Mobile Devices Implementation Guide</i></p>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 4	<p>Install MDG Patches for Gateway on the Applications Database</p> <ol style="list-style-type: none"> <li>a. Download the latest Gateway patches MDG RUP4 (1718256) and patch 1806994</li> <li>b. Install the latest Gateway patches</li> </ol> <p>Reference: <a href="http://www.oracle.com/support/metalink">www.oracle.com/support/metalink</a></p>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 5	<p>Install Oracle 8i Lite Synchronization Server</p> <ol style="list-style-type: none"> <li>a. Install Oracle 8i Lite Synchronization Server (Version 4.0.0.3.0)</li> <li>b. Install Oracle 8i Lite patch (Version 4.0.0.5.0)</li> </ol> <p>Reference: <a href="http://www.oracle.com/support/metalink">www.oracle.com/support/metalink</a></p> <ol style="list-style-type: none"> <li>c. Configure Oracle 8i Lite Message Generating Process (MGP)</li> <li>d. Start the Synchronization Server</li> </ol> <p>Reference: <i>Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i</i></p>

Mandatory	Step Number	Oracle Field Sales/Laptop Implementation Steps
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 6	<p>Download Oracle Field Sales/Laptop ARU #1793488 and extract into a directory in the mid-tier NT machine</p> <ul style="list-style-type: none"> <li>a. Download Oracle Field Sales/Laptop zip file</li> <li>b. Extract the zip file onto the middle-tier machine in the directory ASL_HOME</li> <li>c. Publish the application to the MDG server</li> </ul> <p>Reference: <i>Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i</i></p>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 7	<p>Administer the Mobile Device Gateway</p> <ul style="list-style-type: none"> <li>a. Set MDG System Profile Option Values</li> <li>b. Create Oracle Application User MDG Web Administration Console</li> <li>c. Set up Mobile Users</li> <li>d. Schedule Concurrent Programs</li> <li>e. Monitor the Refresh and Queue Jobs on the Gateway Database</li> </ul> <p><b>Note:</b> When setting up Mobile Device Gateway, please make sure you select the Installed field Field Sales/Laptop check box if you do not have Service application running.</p> <p>Reference: <i>Oracle CRM Gateway for Mobile Devices Implementation Guide</i></p>
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 8	Publish Oracle Field Sales/Laptop Application
<input type="checkbox"/> Yes	<input type="checkbox"/> Step 9	Set up Mobile Users

## Step 1: Installing Oracle Sales Online

Install Oracle Sales Online Release 11i (ARU# 1809318) and verify that the its prerequisite products and dependencies are properly installed. Refer to the *Oracle Sales Online Implementation Guide* for more information.

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## Step 2: Checking Post Installation Steps

Check for the following post installation steps on the Applications Database necessary for the Gateway.

- Ensure Advanced Replication is installed
- Check for Advanced Queues
- Verify the Unique Global Name
- Modify Oracle Applications Database Parameters
- Run snapshot log creation scripts
- Set System Profile Option Values

Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide*

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## Step 3: Installing the Gateway Database

The Oracle CRM Gateway for Mobile Devices is also referred to as MDG or Gateway throughout this document. For further details about installing MDG, please refer to the *Oracle CRM Gateway for Mobile Devices Implementation Guide*.

- Create the Oracle 8i (8.1.6.1.2) Database for MDG
- Set `init.ora` parameters
- Create ADMIN user and tablespaces
- Load the `asgmttran.jar` file from the applications file system in the enterprise machine to the MDG database
- Configure Net8
- Verify Unique Global Name

## Step 4: Downloading and Installing Patches for Gateway

Please download and install the latest Gateway patches. Patches are available on Oracle's website at [www.oracle.com/support/metalink](http://www.oracle.com/support/metalink).

- Download the latest Gateway patches from [www.oracle.com/support/metalink](http://www.oracle.com/support/metalink)
  1. MDG RUP4 (1718256)
  2. Patch 1806994
- Install the latest Gateway patches

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## Step 5: Installing Oracle 8i Lite Synchronization Server

Refer to the *Oracle CRM Gateway for Mobile Devices Implementation Guide* to find more detailed procedures.

- Install Oracle 8i Lite Synchronization Server (Version 4.0.0.5.0)
- Install the Oracle 8i Lite patch (Version 4.0.0.4.0)
- Configure Oracle 8i Lite Message Generating Process (MGP)
- Start the Synchronization Server

This installation is the middle-tier or CRM Gateway for Mobile Devices.

**Note:** Patches are available at [www.oracle.com/support/metalink](http://www.oracle.com/support/metalink)

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## Step 6: Downloading Oracle Field Sales/Laptop

- Download Oracle Field Sales/Laptop ARU #1793488 and extract into a directory in the mid-tier NT machine from [www.oracle.com/support/metalink](http://www.oracle.com/support/metalink)
- Extract ARU # 1793488 into a directory onto the middle-tier machine in directory ASL\_HOME
- Publish the application to the MDG server

Reference: *Oracle CRM Gateway for Mobile Devices Implementation Guide, Release 11i*

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## Step 7: Administering Mobile Device Gateway

Refer to the *Oracle CRM Gateway for Mobile Devices Implementation Guide* to find more detailed procedures.

- Set MDG System Profile Option Values
- Create Oracle Application User for MDG Web Administration Console
- Set up Mobile Users
- Schedule Concurrent Programs
- Monitor the Refresh and Queue Jobs on the Gateway Database

**Note:** When setting up Mobile Device Gateway, make sure that you select the Installed field Field Sales/Laptop check box if you do not have the Service application running.

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## Step 8: Publishing Field Sales/Laptop Application

- From the directory where ARU # 1793488 was unzipped, run the command `wsh-c ASL.ini mobileadmin/manager@MDGSID` to publish the Oracle Field Sales/Laptop application to Gateway/Web to Go server.

**Note:** `Setup.ini` also includes one batch file: `aslsetup.bat`. This is a convenient tool with which the end user can run the Field Sales/Laptop application.

**Note:** MDGSID refers to the server ID of the MDG server database.

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## Step 9: Setting Up Mobile Users

Before creating a mobile user on the Gateway, you must define the user in Oracle Applications as an Oracle Sales Online User and Oracle Mobile Field Sales User.

Reference: *Oracle Applications System Administrator's Guide (A75396-01)*, Managing Oracle Applications Security, Users Window, Responsibilities Block.

1. Login as `asgadm`
2. Click the Mobile Server tab
3. Select Create

**Note:** In order to create a mobile user, the System Administrator must create a Web to Go and Gateway user. The user names and passwords for Web to Go and Gateway must be the same.

4. When selecting a user, make sure the user has a Field Sales role.
5. Send each mobile user the IP address of the Gateway server and user name and password through email.

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## Installing the Application on a Laptop

### Administrator Tasks

The System Administrator sends an email to the laptop user with the Web to Go URL (Universal Resource Locator) and the login username and password.

The URL should be:

<http://WTGSERVER/setup/setup.exe?ini=webtogo.ini>

### Mobile User Tasks

1. While online, navigate to the URL given to you by the system administrator.
2. Download and run `setup.exe`.  
This installs OracleLite and Web to Go and brings up the login page.
3. Enter your username and password.
4. Click the **Logon** button.
5. Click the **Go Offline** tab.
6. Shutdown the Web to Go server by right clicking on the Web to Go icon located on the Taskbar and selecting **Exit**.
7. Download consolidator client `http:\\WTGSERVER/setup`. Run `setup.exe` (install in the same directory as Oracle Lite and Web to Go).
8. Run the consolidator client found in the `YOURDRIVE:\orant\bin` directory.
9. Enter your username, password, and IP address for the server.
10. Click the **Sync** button. (This will take a few minutes.)
11. Click the Cancel button when the synchronization finishes with a success message.
12. Restart the Web to Go server from the taskbar:  
Start > Programs > Oracle for Windows NT > Web to Go  
OR  
Right click over the Web to Go icon and select **Open URL**.
13. Your internet browser will open to the log in page. Use the same username and password.
14. Click **Field Sales Laptop**.

## System Administrator and Mobile User Notes

All items listed below, with the exception of Step 1, are performed by the mobile user.

1. System Administrator sends the Web to Go/Consolidator's username and password, as well as the URL, to the laptop user. The URL is: <http://WTGSERVER/setup/setup.exe?ini=webtogo.ini> (the WTGSERVER is the machine where the Web to Go server is installed).

After the email is sent to the mobile user by the System Administrator with the link to the Gateway server setup screen, login, and password information, the mobile user should follow these steps.

2. Download and run `setup.exe`
3. Set proxy in the browser; Add the machine name in the "Exceptions" list for the proxy.
4. To open the URL, right click on the Web to Go icon in the lower right corner of your screen.
5. Log in with your user name and password.
6. Click **Go Offline** to download the application.  
Wait until the synchronization is complete. You will see the login page.
7. Close your web browser.
8. Right click on the Web to Go icon located on the lower right of your screen. Choose Exit to quit Web to Go.
9. Download consolidator setup (setup.exe) from <http://WTGSERVER/setup>
10. Run setup.exe.
11. Create an icon from the consolidator client. The client program is located in the /bin directory where the consolidator was installed.
12. Click the consolidator client icon.
13. Enter your user name and password.
14. Click **Apply**.
15. Click **Sync**.  
The message "Synchronization Success" appears.
16. Click Start > Programs > Oracle for Windows 95/98/NT > Click **Web to Go**.
17. Login using your user name and password.

18. Right click on the Web to Go icon from the task bar in the lower right of your screen.
19. Choose **Open URL**.

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