Oracle® Field Sales/Palm Devices

Concepts and Procedures

Release 11*i* for Palm OS 3.5 or 4.0

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Overview

Field Sales / Palm Devices provides all the data you need on your hand-held devices to perform sales tasks while away from the office. To be effective, the data residing on the Palm needs to be regularly updated with Oracle E-Business Suite, and data that you entered into your Palm device needs to be transferred to Oracle E-Business Suite. This process of transferring data to and from your Palm device is known as synchronization.

This document covers the following topics:

- The Mobile Device Gateway
- Synchronizing the Palm Device
- Changing Your Password
- Downloading Organizations and Persons
- Managing Organizations
- Managing Persons
- Using Sales Tasks
- Managing Your Opportunities

The Mobile Device Gateway

The CRM Gateway for Mobile Devices consists of a mobile client and a central application. It provides data transport between the Oracle CRM enterprise database and the Oracle mobile client database. The CRM Gateway for Mobile Devices sends correct data to each sales representative. It only transports changed, new, or missing data because it knows what data resides on each device. The CRM Gateway for Mobile Devices also acts as the communication server. This is an economical way to manage wireless communication.

Synchronizing the Palm Device

Before you start the Field Sales / Palm Devices application, you must synchronize to obtain your sales information from the Oracle Sales Online database. You must frequently synchronize your Palm Device with Oracle Sales Online to make your updated information available to others and to keep your Palm up to date. Use this procedure to manually synchronize your Palm Device sales data with Oracle Sales Online through the CRM Gateway for Mobile Devices.

Each Palm user must be assigned an account on the Mobile Device Gateway before data can be synchronized. Refer to the *Oracle CRM Gateway for Mobile Devices Concepts and Procedures* for more information.

1. Tap t he **Applications** icon on the Palm Device to display the application picker.
2. Tap the **OL Sync** icon from the application launcher.
3. Tap **Sync.**

Changing Your Password

Use the following procedure to change your password.

1. Tap the **Applications** icon on the Palm device to display the application picker.
2. Tap the **OL Sync** icon from the application launcher.
3. Tap **New password**.
4. Enter your new password.
5. Tap **OK**.
6. Synchronize.

Downloading Organizations and Persons

Oracle Sales Online (OSO) has a Mobile tab that you use to interface with Field Sales / Palm Devices. This tab enables you to selectively download organizations or persons to your Palm device. Downloading organizations or persons is a twofold process. First, you login to OSO and specify what you want to download and then you login to Field Sales / Palm Devices to accept the download.

Complete the following steps to download organizations or persons to your Palm device:

1. Login to OSO.
2. Select the Mobile tab.
3. Select the Organization subtab.

   You may use any of your saved queries to display organizations.
4. Use the columns on the left to select or deselect the organizations you want to download.

   Optionally, tap **Select All** to select all organizations or **Deselect All** to deselect all organizations.
5. Tap **Update**.

   OSO saves your selections.
6. Logon to Field Sales / Palm Devices and perform a synchronization.

   The organizations you selected in OSO are downloaded on your Palm device.
7. Repeat this procedure, tapping the Persons subtab instead of the Organization subtab, to download persons.

Managing Organizations

You can view and update organization information as well as add new organizations and add notes for an organization using the following procedure.

1. Select **Organizations** from the **Home** menu.
2. Scroll up and down through the list using the up and down tap arrows or the hard scroll buttons.

   If an organization name has a lock icon beside it, then it is read only.

   If an organization name has a Note icon beside it, then you can tap the icon to view related notes. A preference setting controls whether or not you see the note icon. Turning the icon off speeds the scrolling process. To change this preference, perform the following steps:

   a. Tap **Menu** > **Options** > **Preferences.**
   b. Select **Show note icons in list.**
   c. Tap **OK.**
3. If you want to search for an organization, then enter the first letters of the organization name on the **Go to** line (either using the graffiti

writing area or by calling up the keyboard). The organizations whose names begin with the letters are displayed.

4. Tap the name of the organization to see organization details.

   Tap **Notes** if you want to read notes related to the organization. Tap the partial note text to view the full note text. You can browse through all notes for an organization by tapping the arrow keys. Tap **Done** to return to the detail page.

5. If you want to edit information for an organization, then perform the following steps. Records displaying the lock icon are locked and not editable because you are not on the sales team.

   a. Tap **Edit.**

   b. Enter the new information. Pick lists are available for country and state.

   c. Tap **Done.**

   d. If you want to edit the phone number, then tap the phone icon, enter the new number, and tap **Done.**

6. If you want to add a note for the organization, then tap the **Notes** button while viewing the organization detail, or tap the Note icon beside the organization name in the list of organizations to view the Notes screen. You can add notes whether or not the organization displays the lock icon. Then perform the following steps:

   a. Tap **New.**

   b. Enter notes text.

   c. Tap **Type** and associate a note type with the new note.

   d. Tap **Create** to save your note.

7. If you want to add a new organization, then perform the following steps:

   a. On the Organizations list screen, tap **New**.

   b. Enter the new organization name.

   c. Enter web site, address, and other organization information.

   d. Tap **Create**.

   e. Tap **Done.**

Managing Persons

You can view and update information about people as well as add new people and add notes for a person using the following procedure:

1. Select **Persons** from the **Home** menu.

   Initially, only the persons associated with the last organization you accessed appear. The application will remember the last five sites accessed.

2. If you want to select persons associated with a specific organization, then select **By Organization...** from the drop down list and tap the name of the organization.

3. If you want to view all your persons, then select **All** from the drop down list at the top of your screen.

4. Scroll up and down through the list using the up and down tap arrows or the hard scroll buttons.

   If a person has a lock icon beside it, then it is read only.

   If a person has a Note icon beside it, then you can tap the icon to view related notes. A preference setting controls whether or not you see the note icon. Turning the icon off speeds the scrolling process. To change this preference, perform the following steps:

   a. Tap **Menu** > **Options** > **Preferences.**

   b. Select **Show note icons in list.**

   c. Tap **OK.**

5. If you want to search for a person, then enter the first letters of the person's name on the **Go to** line (either using the graffiti writing area or by calling up the keyboard). The persons whose names begin with the letters are displayed.

6. Tap the name of the person to see detail information.

   Tap **Notes** if you want to read notes related to the person. Tap the partial note text to view the full note text. You can browse through all notes for an organization by tapping the arrow keys. Tap **Done** to return to the detail page.

7. If you want to edit detail information for persons, then perform the following steps. Records displaying the lock icon are locked and not editable because you are not on the sales team.

   a. Tap **Edit** or tap the field you want to edit.

   b. Enter the new information.

c. Tap **Done.**

d. To edit phone and e-mail information, tap the relevant icon on the detail screen and edit the record. You cannot delete any phone numbers from a person's phone book but you can update phone information. You can add up to four phone numbers for a person.

e. Tap **Done.**

8. If you want to add a note for the person, then tap the **Notes** button while viewing the person detail, or tap the Note icon beside the person’s name in the list of persons to view the Notes screen. You can add notes whether or not the person displays the lock icon. Then perform the following steps:

   a. Tap **New.**

   b. Enter notes text.

   c. Tap **Type** and associate a note type with the new note.

   d. Tap **Create** to save your note.

9. If you want to add a new person, then perform the following steps:

   a. On the persons list screen, tap **New**.

   b. Choose the Relationship Type from the drop down menu.

   c. Choose the organization this person is associated with.

   d. Enter the detail information.

   e. Tap **Create**.

Using Sales Tasks

A sales task is a reminder which does not have a scheduled start or end time as opposed to an event kept in the Sales Date Book. Tasks can be associated with an organization, a person, or an opportunity or they can stand alone. You can view and update task information as well as add new tasks using the following procedure:

1. Select **Tasks** from the **Home** menu.

   Initially, only the tasks associated with the last site you accessed appear.

2. If you want to select tasks associated with a specific organization, then select **By Organization...** from the drop down list and tap the name of the organization.

3. If you want to view all your tasks, then select **All** from the drop down list at the top of your screen.

4. Scroll up and down through the list using the up and down tap arrows or the hard scroll buttons.
5. If you want to edit the information displayed in the task list, then highlight the task and perform the following steps:
   a. Tap Details**.**
   b. Edit the appropriate field.
   c. Tap **Done.**
6. If you want to add a new task, then perform the following steps:
   a. Tap **New**.
   b. Enter your task name, relate to, priority, due date, type, and status
   c. If you want to add a detailed task description, then tap the second page icon and enter the task description. Or, you can get to the task description by tapping the note icon on the task menu screen.
   d. Tap **Done** to create the task.
7. If you want to view, edit, or add details for a task, then place the cursor on the task and tap **Details.** You can perform any of the following edits:
   a. Tap the Relate To drop down menu for Person, Organization, or Opportunity and make your choice from the displayed lists.
   b. Choose Priority.
   c. Tap the Due Date field to view the following choices: Today, Tomorrow, One week later, No date, or Choose date. Choose date will take you to a calendar.
   d. Tap the Type drop down menu to choose an activity such as appointment or meeting.
   e. If you want to delete the task, then tap **Remove** and then tap **OK.**
   f. Tap **Done** to save your work.
8. If you want to change your task display preferences, then from the task list choose **Options > Preferences.** You can make the following choices:
   - Sort the tasks by priority and then by due date, or by due date and then by priority.
   - Show or hide tasks marked as completed.
   - Show only tasks with a due date of today or earlier or with no due date, or show all tasks.
   - Show or hide the due dates, priorities, and note icons (note icon refers to task description).

- Show or hide completed tasks.

Managing Your Opportunities

A sales opportunity, also known as a lead or a potential sale, is the first step in the sales process. It starts with the first contact with a potential customer and ends when the sales representative turns it into a sale, the opportunity is lost to a competitor, or for other reasons.

You can view and update opportunities as well as add new opportunities and add lines and notes for an opportunity using the following procedure:

1. Select **Opportunities** from the **Home** menu.
2. If you want to see opportunities for a particular organization, then choose By Organization from the Organization menu.
3. Sort your opportunities by date, amount, or name.
4. Scroll up and down through the list using the up and down tap arrows or the hard scroll buttons.

   If an opportunity name has a lock icon beside it, then it is read only.

   If an opportunity name has a Note icon beside it, then you can tap the icon to view related notes. A preference setting controls whether or not you see the note icon. Turning the icon off speeds the scrolling process. You can also set a preference to display or not display closed opportunities. To change these preferences, perform the following steps:

   a. Tap **Menu > Options > Preferences.**

   b. Select or deselect **Show note icons in list.**

   c. Select or deselect **Show closed opportunities.**

   d. Tap **OK.**
5. Tap the name of the opportunity to see opportunity details.

   Tap **Notes** if you want to read notes related to the opportunity. Tap **Lines** if you want to view lines associated with an opportunity. Tap the partial text to view the full note or line text. You can browse through all notes or lines for an opportunity by tapping the up and down arrows. Tap **Done** to return to the opportunity detail.
6. If you want to edit information for opportunities, then perform the following steps from the opportunity detail screen. Records displaying the lock icon are locked and not editable because you are not on the sales team.

   a. Tap the field you want to edit.

b. Enter the new information.

c. Tap **Done.**

d. To edit opportunity lines, find the appropriate opportunity.

e. Tap **Lines.**

f. Find the correct line and tap it.

g. Edit the information.

h. Tap **Done.**

7. If you want to add a note or a line for the opportunity, then tap the **Notes** or **Lines** button while viewing the opportunity detail, or tap the Note icon beside the opportunity name in the list of opportunities. You can add notes for opportunities displaying the lock icon. Then perform the following steps:

   a. Tap **New.**

   b. Enter notes or lines information.

   c. Tap **Create** to save your changes.

8. If you want to add a new opportunity, then perform the following steps:

   a. On the opportunity list screen, tap **New**.

   b. Choose whether the opportunity relates to an organization or a person.

   c. Find and select the organization or person and tap **OK.**

   d. Enter the opportunity name.

   e. Choose the status, close date, sales stage, win probability, channel, close reason (if applicable), and currency.

   f. Tap **Create**.

   g. If you want to add a note or line, then do step 7.

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