Oracle® Sales Offline

User Guide

Release 11*i* (11.5.9)

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This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult Oracle*Metalink* for relevant product patches and documentation.

1 Introduction

As a field sales representative, you are often out of the office working with prospects and customers on sales opportunities and customer issues. It is important for you to be well-informed of the activities and issues of each customer with which you meet. Oracle provides Oracle Sales Offline to help you manage your work while away from the office.

Sales Offline is a mobile application that imports and exports (synchronizes) information from an Oracle enterprise database. This application enables you to view and/or update your sales information remotely via your laptop computer.

This guide describes how to setup and use Sales Offline, and contains these topics:

- Getting Started
- Navigating within Sales Offline
- Synchronizing Data
- Conflict Resolution
- Tasks
- Lead

- Opportunity
- Quote
- Forecast
- Customer
- Implementing Sales Offline

2 Getting Started

This section describes how to download Sales Offline and includes troubleshooting tips for the download.

> **Note:** If you are a DBA or the technical administrator, please complete the procedure in "Implementing Sales Offline" before continuing.

2.1 Downloading the Sales Offline Application

If you are a first-time-user, you must download Sales Offline from Oracle Sales Online before proceeding.

To download Sales Offline:

1. Login to Oracle Sales Online.
2. Click the Mobile tab.
3. Create a new folder in your directory.
4. Download Sales Offline by clicking the Download Sales Offline Template link.
5. Navigate to the downloaded file SalesOffline.zip in your directory.
6. Unzip the file into your folder.
7. Run Sales Offline by double-clicking the file SalesOffline.xls.
8. Enable macros when prompted.
9. Click the Sync icon.
10. Enter the requested user information and then click **Sync**. The synchronization preferences will display the first time you Sync.
11. Enter the download criteria by choosing either the Sales Team Driven download or Forecast Driven download.

    The Sales Team Driven download will result in records based on your sales team access. If you are on the sales team of an Oracle business object (for example, organization, lead, or opportunity) these records will be downloaded to Sales Offline.

The Forecast Driven download of data is based on the opportunities that are open within the forecast range selected. Customer organizations and contacts that are associated with the opportunities are downloaded.

You can further filter your data using the Sync preference filters. These preferences can be saved for use in future synchronizations. The Sync preference filters:

- **Lead Preferences** - can be filtered by Status, Channel, Lead Rank, Budget Status, Time Frame, or Number of Records
- **Opportunity Preferences** - can be filtered by Status, Sales Stage, Sales Channel, Win Probability (from/to)
- **Quote Preferences** - can be filtered by Inventory Category Set (Default Category Set, or the Sales and Marketing Category Set), Inventory Category, Price List

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Note: You must select items (from the Default Category Set, the Sales and Marketing Category Set, or the Price List) for download. You can select items from multiple categories. Multiple items can be selected by highlighting a row and using the Ctrl or Shift functions.

- **Forecast Preferences** - can be filtered by Period Type, Category, Start Period and End Period, Credit Type
- **Organization Preferences** - can be filtered by Customer Category, Country, State

2.2 Troubleshooting Tips

This section describes the most common problems that can occur when attempting to download Sales Offline.

2.2.1 Sales Offline Fails at the Macros

If Sales Offline fails at the macros, check to ensure that the macros security is set at medium or low level. You can do this by navigating to Tools > Macro > Security in Excel 2000.

3 Navigating within Sales Offline

In Sales Offline, tabs indicate the first layer of information and subtabs show further details. Links enable you to access detailed information about specific items.

The following table describes navigation features and fields:

Item	How it works
Tab	Enable you to navigate among the areas of functionality in the application.
Subtab	Enable you to access further functionality under a tab.
Link or hyperlink	Enable you to navigate to further levels of detail under the subtab.
Asterisks	Designate required fields. These fields have a white background. Fields with a white background and no asterisk are optional. Fields with a grey background are read-only.
Column headings	Enable you to sort rows of information. Clicking on a column heading will sort rows in ascending or descending order based on the information in the selected column.
Go button	Enables searches for a list of values.
Ctrl F	Enables you to search for a specific value.

4 Synchronizing Data

The Sales Offline synchronization process uploads changes or additions to the server and downloads changed or added records back to the laptop. You do not have to login to Oracle Sales Online to upload and download data. The sync function handles this process within the application.

Complete the following steps to synchronize data:

1. In Sales Offline, click the Sync icon.
2. Enter the proper information in any blank fields.
3. Click **Sync** to start the synchronization process. A status bar will appear giving you information on the synchronization progress.
4. You will receive a message at the end of the synchronization process informing you that the synchronization was successful or if there were errors.

a. If you receive conflict errors (usually noted as a stale data message), navigate to the Home tab and click the Conflict Resolution subtab to resolve the conflicts in the Conflict Resolution screens (see "Conflict Resolution").

b. If you receive a server not found and not available error, please contact your administrator for assistance.

4.1 Changing Data Download Criteria

Follow these steps if you want to change the data download preference criteria:

1. In Sales Offline, click the Profile icon.
2. Update appropriate information.
3. Click **Save** to save changes or **Sync** to start the synchronization process (which will save changes on completion).

5 Home Tab

The Home tab is the first screen you see when you invoke Sales Offline. The Home tab lists new items or items that have changed since the last time Sales Offline was synchronized.

Initially, the Home tab will show no records listed. New or changed items will be listed as the result of subsequent synchronizations. Records will be listed in the appropriate tables, depending on the source of the record. You can click on the hyperlink for the listed record to learn more about it.

6 Conflict Resolution

Using a remote application that synchronizes information with a master database can result in data conflicts. Conflict resolution is critical to using a remote application successfully, and it is important that up-to-date and accurate information is written to the master database. It is important to note that the server record will always override your Sales Offline client record. If the same server and client record has been changed in between synchronization processes, a conflict will occur, and the server record will override your client record. The conflict can be resolved in the Home tab, using the Conflict Resolution subtab.

To resolve conflicts between the Oracle Sales Online database and Sales Offline:

1. Open Sales Offline.
2. Click the Conflict Resolution subtab in the Home tab.

3. In the Conflict Resolution screen, you will see tables of conflicts that occurred during synchronization.
4. Click the link to see details of the conflicted record and make the necessary updates before deciding to apply the changes or discard them.

   On the left side of the form is your local Sales Offline record. On the right side of the form is the Oracle Sales Online server record. The fields that caused the conflict are shown in red.

   If you choose Reapply, the Sales Offline record will override the Oracle Sales Online record. You must perform a synchronization for your record to be applied to the database. If you choose Discard, your Sales Offline changes will not be applied to the Oracle Sales Online server. If you discard the conflicts you do not need to perform a synchronization.
5. From the main Conflict Resolution screen you can select groups of conflicted records to Reapply or Discard. Select the checkbox by the record(s) you want to reapply or discard. If you want to reapply your changes to the server, click **Reapply**. If you want to discard the conflict, click **Discard**.

7 Tasks

Use the Tasks tab to view, create and edit tasks. Tasks are your day-to-day activities related to customers, leads, and other sales-cycle events. Also, the Calendar button enables you to access a Daily Task summary, which lists your tasks occurring between specified start and end dates.

The Task tab displays all of your tasks, or tasks that have been assigned to you. These task details are displayed:

- Task number (hyperlinks to Task Details screen)
- Task name
- Start date and end date
- Task type
- Status
- Category
- Priority
- Source
- Source Name (hyperlink to further information about the named source)

Tasks can be sorted by time or date, in ascending or descending order.

7.1 Creating a Task

To create a task:

1. In the Task tab, click **Create**.

   The Create Task form opens.

   You can also create tasks directly from the source object. Navigate to the source object, open the details user form, and click the Task tab in the details form. Click **Create** while in the task tab to create a new task for that source object.

2. Select a task type for the task.
3. Enter a task name and the appropriate required data.
4. Complete any other optional fields and click **Create** to create a task.

7.2 Customer Frame in the Task Details User Form

If you create a new task from the Task summary sheet, the Customer frame will not automatically populate information. You may add an existing Organization (party) or Contact (relationship) to the Customer frame. In the type menu select either Organization (party) or Contact (relationship). In the Name field, place in the appropriate Organization or Contact and click **Go**. Select the item you wish to add from the list of values. Certain information, if applicable, will populate in the other fields of the Customer frame depending on the item you selected.

If you create a task from a source, i.e., Organization or Opportunity, the Customer frame will automatically populate certain information. For example, if you create a new task from the Organization user form (using Create Task in the Task tab of the Organization user form), the Organization name and associated information, if applicable, will automatically populate into the Customer frame.

If you create a task from a lead, opportunity or quote, the Customer frame will automatically populate the Party (for example, Organization) and associated information, if applicable, into the Customer frame

7.3 References Tab in the Task Details User From

The references tab in the Task detail user form allows you to add reference information to the Task. You may add additional Organization, Opportunity, Lead or Quote information to the existing Task. Highlight the appropriate reference from the Reference Type menu, and place in the appropriate Organization, Opportunity, Lead or Quote name and click **Go**. Select the item you wish to add from the list of values.

You may also remove any reference rows by selecting the associated remove checkbox and clicking **Save** or **Apply**.

Note: The References tab in Sales Offline will not automatically populate reference rows. Upon syncing the newly created task, the reference rows will automatically be created in the online sales application, and the appropriate reference rows will be synchronized to the Sales Offline task record. You may add additional rows in Sales Offline if you choose to do so.

7.4 Assignments Tab in the Task Details User From

The assignments tab in the Task detail user form allows you to add assignee's to a particular task. You may add additional persons to assign the task. In the Assignments tab of the Task detail user from, click the add an assignment menu, select the person to assign the task, and click **Add**.

You may also remove an assignment rows (except the "owner" row) by selecting the associated remove checkbox and clicking **Save** or **Apply**.

Note: The Assignments tab in Sales Offline will not automatically populate any assignment rows. Upon syncing the newly created task, the assignments "owner" row will be automatically created in the online sales application, and the "owner" row will be synchronized to the Sales Offline task record. The "owner" of the task will be the Sales Offline user who created the task. You may add additional assignee rows in Sales Offline if you choose to do so.

7.5 Contacts Tab in the Task Details User From

The contacts tab in the Task detail user form allows you to add Contacts to a task. In the Contacts tab of the Task detail user from, place in the contacts name you wish to add, click **Go**, and select the contact from the list of values. In order to select the primary contact for a Task, highlight and select the primary radio button next to the contact you wish to mark as primary.

You may remove any contact rows by selecting the associated remove checkbox and clicking **Save** or **Apply**.

Note: The contacts (party relationships) available in the Contacts tab of the Task details form is dependent upon the information in the Customer Frame of the Task details tab. Only contacts associated (i.e. which have relationships to the Organization) with the Organization in the Customer Frame will be available to choose form in the Contacts tab.

7.6 Updating a Task

To update an existing task:

1. In the Task tab, click the task number. The Task Details form opens.
2. Complete any appropriate updates.
3. Click **Apply** to apply changes as you continue to make changes, or click **Save** when you have completed your changes.

7.7 Accessing the Daily Task Summary

Click **Calendar** to access a Daily Task Summary. This summary displays all of the tasks that have a start date of a specified day, or within a date range. The task summary displays this task information:

- Task name
- Status
- Start date and end date

Note: Sales Offline supports a pop-up date chooser for the Task Module. In order for the date chooser to work properly, you must install the file Microsoft Windows Common Controls-2 6.0 (Mscomct2.ocx). This file may already be installed on your computer. Contact your system administrator for assistance.

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8 Lead

Use the Lead tab to view and manage leads. Leads are intended to capture the initial contact with potential customers, gathering information to indicate to a sales organization whether or not there is sufficient interest on the part of the buyer. When a lead is entered into the system, it can be ranked and assigned to the appropriate sales resource.

Once enough key information has been gathered, a lead can be qualified by a sales representative.

Leads can be generated through different sources:

- Marketing campaigns and trade shows can generate leads that can be imported into the system through the Lead Import process.
- TeleSales agents record lead information from phone calls into the system.
- Field Sales representatives record lead information from the field into a sales application.

You can perform the following functions from the lead tab:

- Create leads
- Update leads, which includes maintaining:
  - Contacts
  - Sales Teams
  - Purchase Items
  - Notes

> **Note:** There is Flexfield support for the Lead module. If Flexfield functionality has been implemented for a lead, the Flexfield name, field, and Flexfield will appear in the appropriate user form section.

8.1 Creating a Lead

To create a lead:

1. In the Lead tab, click **Create**.

   The Create Lead form opens. Certain fields will automatically populate based on data and profile preferences established in your Online Sales applications.

   Select the appropriate customer from the customer menu. If the customer does not exist, click **New** to create a new customer. See Customer for details on creating a new customer.

   Select an address by clicking **Add** or **Change** next to the address field. A list of customer addresses displays in the Select an Address form. Click the radio button next to the appropriate address and click **Select**.

2. Enter a lead name and the appropriate required data.

3. Click the Purchase Items tab to add purchase items as needed, specifying Product Category, quantity, amount, and source name. You can add one or multiple purchase items. Click **Save** to add the items.
4. Complete any other optional fields and click **Save** to create a lead.
5. Click the Notes tab to add notes to the lead.

   If needed, click **Cancel** to cancel creation of the lead.

8.2 Updating a Lead

To update an existing lead:

1. In the Lead tab, click the name of the lead. The Lead Details form opens.
2. Complete any appropriate updates.
3. Click the Contacts tab to add new contacts as needed. Only contacts associated with the header organization are available.
4. Click the Sales Team tab to add or remove sales team members.
5. Click the Notes tab to add notes to the lead.
6. Click **Save** when you have completed your changes.

   If needed, click **Cancel** to cancel update of the lead.

9 Opportunity

An opportunity is a potential sale. This process begins with the initial customer contact and ends when the sales representative makes or loses the sale.

You can perform the following functions from the opportunity tab:

- Create opportunities
- Update opportunities, which includes maintaining:
  - Purchase Items
  - Contacts
  - Win/Loss
  - Sales Team
  - Notes

Once opportunities are identified, you can perform the following tasks:

- Identify how the opportunity came about

- Enter information on items to be purchased
- Track the likelihood of closing the sale
- Allocate credit toward sales quotas after closing a sale
- Create a quote from the opportunity

Sales representatives can manage existing opportunities, assigned to them manually or automatically through Territory Assignment, or they can enter new opportunities.

By default, the sales representative who created the opportunity has full access to the opportunity. Full access to the opportunity means that the sales representative who created the opportunity can add other sales team members, assign sales credits, and rate the likelihood that the opportunity will succeed.

Note: There is Flexfield support for the Opportunity module. If Flexfield functionality has been implemented for an opportunity, the Flexfield name, field, and Flexfield button will appear in the appropriate user form section.

9.1 Creating an Opportunity

Complete the following steps to create an opportunity:

1. In the Opportunity tab, click **Create**.

   The Create Opportunity form opens.

   Select the appropriate customer from the customer menu. If the customer does not exist, click **New** to create a new customer. See Customer for details on creating a new customer.

   Select an address by clicking **Add** or **Change** next to the address field. A list of customer addresses displays in the Select an Address form. Click the radio button next to the appropriate address and click **Select**.

2. Enter an opportunity name and the appropriate required data.
3. Complete any other optional fields.
4. Click the Purchase Items tab to add purchase items as needed. You must specify the product category. Enter the quantity and amount where necessary.
5. Click the Notes tab to add notes to the opportunity.

   If needed, click **Cancel** to cancel creation of the opportunity.

9.2 Updating an Opportunity

To update an existing opportunity:

1. In the Opportunity tab, click the name of the opportunity. The Opportunity Detail form opens.
2. Complete any appropriate changes.
3. Click the Purchase Items tab to add purchase items as needed. You must specify the product category.

   In order to view or edit the Opportunity Sales Credits, click **Split**. Add or edit the appropriate sales credit items.
4. Click the Contacts tab to add or remove contacts as needed. Only contacts associated with the header organization are available.
5. Click the Win/Loss tab to close an opportunity with the appropriate status.
6. Click the Sales Team tab to add or remove sales team members.
7. Click the Notes tab to add notes to the opportunity.
8. Click **Save** when you have completed your changes.
9. Click **Create Quote** to flow the opportunity information into a new quote. A new quote can be created based on certain information carried over from an existing opportunity. Only purchase item rows with a specified inventory item numbers will be carried over to the new quote.

   If needed, click **Cancel** to cancel the update of an opportunity.

9.3 Opportunity to Quote Business Flow

To create a quote from an opportunity:

In the Opportunity user form, click **Create Quote**.

Certain information will flow from the opportunity to the new quote. The opportunity information that will go into the new quote (provided the information exists in the opportunity) is:

- Opportunity Name
- Customer Name
- Address
- Sales Channel
- Opportunity Purchase Items (if they have specific inventory items on the purchase item line)

Note: In the 11i9 release, you may not change the Quote Name (carried over from the Opportunity in the Opportunity to Quote business flow) nor the Quantity amounts. These items may be changed after a successful synchronization has occurred.

10 Quote

A quote is the communication of pricing and discounts for a particular sale. When the customer is ready to order a particular product they are notified of this available pricing and discount information through a quote.

Note: You must select specific items from the Profile: Sync Preferences: Quote Tab to be used in the quoting module Only those items downloaded to Sales Offline can be used to add new products to the quote.

You can perform the following functions from the quote tab:

- Create quotes
- Update quotes, which includes maintaining:
  - Lines
  - Addresses
  - Sales Teams
  - Sales Credits
  - Notes

Note: There is Flexfield support for the quote module. If Flexfield functionality has been implemented for a quote, the Flexfield name, field, and Flexfield button will appear in the appropriate user form section.

10.1 Creating a Quote

To create a quote:

1. In the Quote tab, click **Create**.

   The Create Quote form opens.

2. Enter a quote name.

3. Enter a customer. Place the appropriate customer name in the customer field and click Go. The list of customers will display. You can select a customer from this list, or search for another customer.
4. Enter a contact. Enter the appropriate contact name in the contact fields and click Go. The list of contacts will display. You can select a contact, or search for another contact.
5. Complete the other required fields and any appropriate optional fields and click **Save** or **Apply** to create a quote.
6. Click the Lines tab to add product lines. Click **Add New Product** to search and select products for the quote.
7. Click the Addresses tab to add shipping and billing addresses, and manage payment terms.
8. Click the Sales Team tab to add new members to the sales team.
9. Click the Sales Credits tab to give credits for the appropriate sales representative.
10. Click the Notes tab to add notes to the quote.
11. Click Apply to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.
12. Click **Save** when you have completed your changes.

    If needed, click **Cancel** to cancel the creation of the quote.

10.2 Updating a Quote

To update an existing quote:

1. In the quote tab, click the name of the quote. The Quote Details form opens.
2. In the Main Details tab, complete any appropriate changes.
3. Click the Lines tab to add or remove product lines.
4. Click the Addresses tab to add shipping and billing addresses, and manage payment terms.
5. Click the Sales Team tab to add or remove sales team members.
6. Click the Sales Credits tab to give credits for the appropriate sales group.
7. Click the Notes tab to add notes to the quote.
8. Click Apply to commit changes and calculate values. You can modify values and then click **Apply** to recalculate values dynamically.

9. Click **Save** when you have completed your changes.

   If needed, click **Cancel** to cancel the update of the quote.

10.3 Quote Approvals

If you have approvals established for the Quoting application, the Initiate Approvals button will appear in the Approvals tab of the Quote details user form. If the status transition is to get an Approval, the user can hit the Initiate Approvals button for the approvals process to take place. The Quote must be synchronized for the approvals process to begin. No approval rows will be displayed in the Approvals tab of the Sales Offline, Quote details user form.

10.4 Place Order

The Place Order button will highlight on the Sales Offline, Quote Details user form if the Place Order status transition is established in the Quoting application.

11 Forecast

Forecasting is a quantitative tool used to predict the amount of sales for a specified time period. Forecasting can be used by managers and sales team members to commit to the amount of sales that they will close by the end of the forecasting period. You can forecast at two levels:

- Product Category: Forecasting at the Product Category level provides sales team members with an easy way to forecast their sales at the product level by rolling up opportunity lines into product groupings.
- Opportunity: Forecasting at the Opportunity level provides a tool for sales team members to create their own view and commitment of the opportunities that they or their sales representatives are working on.

Perform the following functions from the Forecast tab:

- Generate forecasts and submit forecasts
- View opportunity level worksheets
- View product category worksheets
- View generate forecast values

11.1 Opportunity Worksheet

Opportunity Level Forecasting provides a tool for sales team members to view their opportunities being forecasted. Worksheets are submitted with the generated forecasts chosen for submission.

To view opportunity worksheets:

1. From the Forecast tab, click the Opportunity subtab.

   The Opportunity Worksheet page opens.

2. From the drop down list select the Sales Group, for which you want to view forecast.
3. Select the Period Name from the drop down list.
4. The forecast numbers will reflect the opportunity forecast data available in Sales Offline.

Pipeline defaults use the following criteria:

- Worst Case: Total Won Amount = Sum of all won opportunities
- Forecast: Weighted pipeline = Weighted sum of open opportunity amount multiplied by their win probability
- Best Case: Total sum of all forecast opportunities

5. You can edit the forecast values by highlighting the Best Case, Forecast, or Worst Case cell and adding in the value.
6. Click **Save** to save your Opportunity worksheet.

11.2 Product Category Worksheet

Forecasting at Product Category level gives sales team members an easy way to view their pipeline aggregated into product groupings. Worksheets are submitted with the generated forecasts chosen for submission.

Viewing Product Level Forecasts Using Product Category Worksheets

To view product level forecasts using product category worksheets:

1. From the Forecast tab, click the Product Category subtab.

   The Product Category Worksheet page opens.

2. From the drop down list select the Sales Group, for which you want to forecast.
3. Select the Period Name from the drop down list.
4. The forecast numbers will reflect the opportunity forecast data available in Sales Offline.

5. You can edit the forecast values by highlighting the Best Case, Forecast, or Worst Case cell and adding in the value.

Pipeline defaults use the following criteria:

- Worst Case: Total Won Amount = Sum of all won opportunities
- Forecast: Weighted pipeline = Weighted sum of open opportunity amount multiplied by their win probability
- Best Case: Total sum of all open opportunities

6. Click **Save** to save your Product Category worksheet.

11.3 Generating Forecasts

Under the Forecast tab, you will find the Generate Forecast subtab. Sales representatives can generate individual forecasts for multiple periods from this page. Forecasts are generated based on their current downloaded pipeline values. Users can forecast based on their default currency.

To generate a forecast:

1. From the Sales Group section, select a sales group from the drop down list.
2. From the Forecast section, select the Period Type from the drop down list.
3. Select the "From Period" and "To Period" from the drop down lists.
4. Select the Forecast Category from the drop down list.
5. Click **View**.
6. Displays the values that will be generated for your forecast.
7. Select all periods for which you want to generate forecasts by selecting the check box.
8. Click **Submit**.

The forecast is now ready to be submitted when you synchronize. Only the most recent submission is accepted. You can not submit more than one forecast per synchronization.

11.4 View and Submit Forecasts

To view Forecasts:

1. From the Forecast tab, click the Forecast subtab.
2. Select the Sales Group from the drop-down list.

3. Select the Period Name from the drop down list.
4. The forecast numbers will reflect the opportunity forecast data available in Sales Offline.
5. You can edit the forecast values by highlighting the Best Case, Forecast, or Worst Case cell and adding in the value.
6. Click **Submit**.

   The forecast is now ready to be submitted when you synchronize. Only the most recent submission is accepted. You can not submit more than one forecast per synchronization.

12 Customer

The Customer tab is comprised of two subtabs, Organization and Contact. By default, the Customer tab opens to the Organization page. Click the Contact subtab to open the Contact page.

Use the Customer tab to create and maintain the following:

- Organizations
- Contacts

> **Note:** There is Flexfield support for the customer module. If Flexfield functionality has been implemented for an organization or contact, the Flexfield name, field, and Flexfield button will appear in the appropriate user form section.

12.1 Organization Subtab

From the Organization subtab, you can perform the following functions:

- Create organizations
- Maintain organization details
- Create and maintain notes
- Create and maintain sales team members
- Create and maintain address details

12.1.1 Creating a Customer - Organization

To create an organization:

1. In the Customer tab, Organization subtab, click **Create**. The Create Organization form opens.

2. Enter the organization name and any other required fields in the Main Details form.
3. Optionally, complete any non-required fields.
4. Click the Addresses tab to manage addresses for the organization.
5. Click **Create Address** to add a new address. Enter the required fields (an address type) and click **Save** to save the address information.
6. Click the Notes tab to add notes to the customer information.
7. Click **Save** to create a new organization.

   If needed, click **Cancel** to cancel the customer information.

12.1.2 Updating a Customer - Organization

To update information for an organization:

1. In the Customer tab, Organization subtab, click the name of the organization.
2. The Organization Detail form opens.
3. Complete any appropriate changes.
4. Click the Addresses tab to manage addresses for the organization.
5. Click **Create Address** to add a new address. Enter the required fields (an address type) and click **Save** to save the address information.

   To edit an existing address, click the address hyperlink. Complete any appropriate changes and click **Save** to save your changes, or click **Cancel** to cancel the update.
6. Click the Sales Team tab to add new members to the sales team.
7. Click the Notes tab to add notes to the customer information.
8. Click **Save** to commit your changes.

   If needed, click **Cancel** to cancel the update of the customer information.

12.2 Contact Subtab

You can use the Contact subtab to perform the following tasks:

- Create a contact
- Maintain contact details
- Add and maintain contact address information
- Create and maintain notes

12.2.1 Creating a Customer - Contact

To create a contact:

1. In the Customer tab, Contact subtab, click **Create**.

   The Create Contact form opens.

2. Select a Contact. You can select an existing contact from the list of contact names in the Contact Name drop-down menu, or specify a new Contact name by clicking New.

   To create a new contact, click New, and then enter the contact's name and other required fields. Click Create to create the new contact. The newly created contact is now available for you to add to an existing organization.

3. Select Organization.

   If the organization is new, click **New** next to the organization field to create new organization. Refer to "Organization Subtab" for details on creating an organization.

4. Select a relationship type in the Relationship Details section.

5. Complete any appropriate optional fields.

6. Click **Add an Address** in the Addresses tab to add new addresses for the contact. A list of addresses associated with the organization will appear. Choose an address and click **Select**.

7. Click the Notes tab to add notes to the contact.

8. Click **Save** to create a new contact.

   If needed, click **Cancel** to cancel the creation of the contact.

12.2.2 Updating a Customer - Contact

To update information for a contact:

1. In the Customer Tab, Contact subtab, click a contact name. The Contact detail form opens.

2. Complete any appropriate optional fields.

3. Click the Addresses tab to add new addresses for the contact.

4. Click the Notes tab to add notes to the contact.

5. Click **Save** to commit your changes.

   If needed, click **Cancel** to cancel the update of the contact.

13 Implementing Sales Offline

This section is meant for the DBA or the technical administrator.

13.1 System Administration Tasks

To implement Sales Offline:

1. Ensure that the customer has fully implemented Oracle Sales Online.
2. Ensure that the customer has licensed Oracle Mobile Field Sales Laptop (ASL) and applied Sales Offline patches using ADpatch.
3. After applying the patches, clear the Jserv cache.
4. If implementing Flexfields, refer to Section 13.4.
5. Restart the application server.

13.2 Configuring Tab Display

Use the ASL_XLS_MAIN_MENU file to control the display of tabs in Sales Offline. This step is only necessary if you want to customize the tab display in Sales Offline.

1. Using System Administrator responsibility, launch the Menus form and navigate to the ASL_XLS_MAIN_MENU menu.
2. Edit the tab display as desired.
   - To change the label of a tab, edit the Prompt field of the corresponding menu entry.
   - To change the order of tabs, recreate the menu entries with the correct sequence (determined by the Seq field).
   - To remove a tab, clear out the Prompt field of the corresponding menu entry.
   - To customize the subtabs, refer to the Submenu name under the parent menu and find that menu. Then modify as described for tabs. For example, to customize the subtabs under the Home tab, find the menu ASL_XLS_HOME and edit its menu entries.

Note: ASL_XLS_MAIN_MENU and its submenus are not associated with any existing responsibility. As a result, changes to these menus affect all Sales Offline users. Menu and function exclusion defined at Responsibility level are not considered when rendering tabs in Sales Offline. An exception is the ASL_EXCEL_MENU menu, which is used for the Mobile tab (accessible from Oracle Sales Online).

13.3 Setting System Profile Options for Sales Offline

This section describes the system profile options used by Sales Offline. The procedure for setting and changing system profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

The profiles described are:

- General System Profiles
- User Preference Profiles
- Sync Time Profile
- Field Sales/Laptop Profiles
- Downloaded Online Application Profiles
- Quote Profiles
- Forecasting Profiles

13.3.1 General System Profiles

These are the system profile options you can set:

- ASL: Campaign Code Download Threshold - Determines the number of campaign (source/offer) codes to download.
- ASL: Excel Debug - if set to Yes, debug option is turned on and the application will create logs on the server. The log file will be created in a directory of the middle tier. The location of that directory is specified by the Jserv parameter "service.Logging.common.filename". The format of the file name is ASL_[username]_[sessionname].log.
- ASL: Download Service Items - set profile to N if you do not implement the Service Contract module.

13.3.2 User Preference Profiles

These profiles are used for storing user's preference specified in Sync Preferences UI. No setup is required. Do not attempt to manually change these values.

- ASL: Excel Budget Status
- ASL: Excel Customer Category
- ASL: Excel End Period
- ASL: Excel Forecast Category
- ASL: Excel Forecast Credit

- ASL: Excel From Win Probability
- ASL: Excel Lead Channel
- ASL: Excel Lead Max
- ASL: Excel Lead Rank
- ASL: Excel Lead Status
- ASL: Excel Opportunity Status
- ASL: Excel Organization Country
- ASL: Excel Organization State
- ASL: Excel Period Type
- ASL: Excel Sales Channel
- ASL: Excel Sales Stage ID
- ASL: Excel Start Period
- ASL: Excel Timeframe
- ASL: Excel To Win Probability

13.3.3 Sync Time Profile

This system profile option is used for storing user's last sync time. Please do not change.

- ASL_EXCEL_LAST_SYNC_TIME

13.3.4 Field Sales/Laptop Profiles

These system profile options are used in Field Sales/Laptop. They are obsolete, and not required for use in Sales Offline. They are listed here for your information:

- ASL: ACCESS_CALLOUTS
- ASL: Conflict Flag
- ASL: Default MTL Organization ID for Field Sales/Laptop
- ASL: Enable Attachment
- ASL: Enable Configurator
- ASL: Enable Encyclopedia
- ASL: Enable Selective Download
- ASL_WRAPPER_DEBUG

13.3.5 Downloaded Online Application Profiles

Sales Offline will download and use these profiles if they are established in the online applications. Refer to the appropriate online application implementation guide for further details on these profiles:

- ASO: Default Currency Code
- ASO: Default Order Type
- ASO: Default Ordered Quantity in OC UI
- ASO: Default Quote Status
- ASO: Default Sales Channel
- ASO: Quote Duration
- ASO: Validate Salesrep
- BNE Servlet Path (see section 13.4 for more details)
- IES: Organization Id
- OS: Address Required for Opportunity
- OS: Address Required for Organization
- OS: Address Required for Person
- OS: Address Required for Sales Lead
- OS: Decision time frame required
- OS: Default Budget Status for Leads
- OS: Default Channel for Leads
- OS: Default Close Date Days
- OS: Default Decision Timeframe for Leads
- OS: Default Lead Contact Role
- OS: Default Opportunity Sales Stage
- OS: Default Opportunity Status
- OS: Default Opportunity Win Probability
- OS: Default Sales Channel
- OS: Forecast Sales Credit Type
- OS: Opportunity Probability Link
- OS: Sales Methodology
- OS: Source Code Mandatory for Leads

- OS: Source Code Required for Opportunity
- OSO: Default Country
- OSO: Default Forecast Currency
- OSO: Forecast Max Generate Months

13.3.6 Quote Profiles

These Quote profiles are supported:

- JTF_PROFILE_DEFAULT_CURRENCY
- ASO: Enable Approvals
- ASO: Allow Skip Approvers
- ASO: Default Currency Code
- ASO: Default Ordered Qty in OC UI
- ASO: Default Quote Status
- ASO: Default Sales Channel
- ASO: Enable Line Flexfields in HTML UI
- ASO: Default Order Type
- ASO: Quote Duration
- ASO: Enable Security Check
- ASO: Enable Submit Button
- ASO: Status Override
- ASO: Validate Salesrep

13.3.7 Forecasting Profiles

If you are implementing Forecasting for the 11.5.8 or 11.5.9 release, use these profiles:

- OSO: Allow Opportunity Forecast By Product Category = No
- OSO: Enable Opportunity Worksheet Threshold = No
- OSO: Opportunity Worksheet Threshold Amount = Empty

13.4 Descriptive Flexfield Support

Sales Offline leverages several flexfield application setups from Oracle Sales, Oracle Order Capture, and Oracle Receivables.

If you implement Descriptive Flexfields for the online applications and use them in Sales Offline you must set the this profile:

BNE Servlet Path = the servlet path that Servlet Engine specifies

(this path should be specified in zone properties file in Apache configuration).

13.4.1 Sales Offline Opportunity and Lead Flexfields

These opportunity and lead flexfields are supported by Sales Offline:

- Application: Oracle Sales
- Title: Opportunities
- Title: Sales Leads
- Title: Opportunity Lines
- Title: Sales Lead Lines

13.4.2 Sales Offline Organization and Contact Flexfields

These customer organization flexfields are supported by Sales Offline:

- Application: Oracle Receivables
- Title: Party Information
- Title: Organization Contact Information

13.4.3 Sales Offline Quoting Flexfields

These quoting flexfields are supported by Sales Offline:

- Application: Oracle Order Capture
- Title: Header: Additional Information
- Title: Lines: Additional information

13.4.4 Sales Offline Task Flexfields

This task flexfield is supported by Sales Offline:

- Application: CRM Foundation
- Title: Tasks additional information