

Oracle® Sales Offline

Implementation Guide

Release 11.5.9

February 2004

Part No. B12142-01

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 *OracleMetalink* for relevant product patches and documentation.

1 Introduction

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

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

- [Section 2, "Sales Offline Prerequisites"](#)
- [Section 3, "Downloading the Sales Offline Application"](#)
- [Section 4, "Version Identification"](#)
- [Section 5, "Status Bar Messages"](#)
- [Section 6, "Timing Log"](#)
- [Section 7, "Implementing Sales Offline"](#)
- [Section 8, "Documentation Accessibility"](#)

2 Sales Offline Prerequisites

These are the prerequisites for Oracle Sales Offline:

ORACLE®

Copyright © 2004, Oracle.
All Rights Reserved.

Oracle is a registered trademark and Oracle*Metalink* is a trademark or registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Oracle Applications

- Oracle Field Sales, minimum version required is 11.5.7 (also known as Oracle Sales Online)
- Oracle Quoting, minimum version required is 11.5.7 (if you will be using offline quoting)
- Oracle Web Applications Desktop Integrator

System Requirements

- Windows 95/NT/2000 operating system
- Microsoft Excel 2000
- Licensed copy of WinZip

System Recommendations

- 500 mHz or higher processor
- 256 mb RAM or higher

Oracle Field Sales Access

User should have access to Oracle Field Sales (Oracle Sales Online) in order to download the Oracle Sales Offline template. This requires the user to be set up as a Resource for Oracle Field Sales. See the *Oracle Field Sales Implementation Guide* for details on Resource set up.

Pop-up Date Chooser For Sales Offline Task Module

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 (Mscmct2.ocx). This file may already be installed on your computer. Contact your system administrator for assistance.

3 Downloading the Sales Offline Application

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

To download Sales Offline:

1. Login to Oracle Field Sales, with the Sales Online Administrator responsibility.
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 the Territory Driven, Sales Team Driven, or Forecast Driven download.

The Territory Driven download synchronizes sales records that reside in the user's sales territory. Sales territories are established using Territory Manager in conjunction with the Sales applications assignment process.

The Sales Team Driven download results in records based on the users sales team access. If the user is on the sales team of an Oracle business object (for example, organization, lead, or opportunity) these records are 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 are:

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

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
- **Customer Preferences** - can be filtered by Customer Category, Country, State

3.1 Troubleshooting Tips

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

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.

Suggestions for Reporting Users Reporting Problems

Please provide the following information to help expedite problem resolution:

- Provide an ASL Debug log. See [General System Profiles](#) for details on setting up an error log.
- Provide a screen capture or details from the Sync Details dialog box.
- Provide the error log from the client. See [Timing Log](#) for details on setting up detailed logging.

4 Version Identification

Sales Offline provides a version number that uniquely identifies the version of the client in use. This enables users to provide support personnel with a unique version number that identifies the implemented client version by navigating to Oracle > About Sales Offline.

4.1 Template Identification

Each downloaded Sales Offline template has a unique identifier that allows it to maintain separation from all other templates on the user's computer.

Multiple templates using the same server instance will no longer affect each other's functionality. This applies to all combinations of user names, server names and server ports.

For example, a user could download template version 11.5.9.12, and then later download template version 11.5.9.14. When the user opens the newer

template, the template will check the version numbers of all templates in use. If the template finds that the version has incremented to a higher version, it will then check the last update date in the registry keys, and will delete the registry key for the older version of the template.

5 Status Bar Messages

Status bar messages display during file open, synchronization, file save, and file close operations, so that the user knows what is occurring. Status bar messages are reported to the user as each processing phase occurs. For example, if the phase is 'save contacts', the message 'Saving Contacts' are displayed.

These are the same messages displayed in the Sync Console popup window. In this window, the user can click **Show** to expand the Sync Console and show synchronization processing messages. These messages are similar to a log file, or click **Hide** to hide the processing messages.

6 Timing Log

Timing functionality has been added to Sales Offline to provide timing statistics for these events:

- Opening a file
- Synchronizing data
- Saving a file

These statistics enable administrators to analyze Sales Offline's performance and identify issues that may arise when a volume of records are processed.

Enabling Detailed Logging

Steps

By default, the timing log is always enabled. You can choose to enable detailed logging.

1. Open SalesOffline.xls.
2. Select Oracle > Logging > Detailed

You can also choose Reset to restart the logging, so that the existing log file is deleted and a new one begun during your current session.

3. Exit the template.
4. Reopen the template.

The next time you synchronize your data, Sales Offline will write detailed logging information about your synchronization (either full or incremental) or opening or saving a file to the log file. The log file is located in the logs directory in the folder containing Sales Offline.

Note: Each time you open the Sales Offline template, the .log file is copied to a .bak file, and the .log file is cleared. To view the timing log, you must look at the log in the logs directory before you open the template (for example, aslerror.log).

Logging for a Full or Incremental Synchronization

Steps

The first synchronization of the Sales Offline data is a full synchronization. Subsequent synchronizations may be full or incremental.

1. Open SalesOffline.xls.
2. Perform a synchronization by selecting the Sync button and providing login information.
3. Exit the template.
4. View the resulting log file in the logs directory in your Sales Offline folder.

7 Implementing Sales Offline

This section contains implementation information meant for the system administrator maintaining Oracle Sales Offline.

7.1 System Administration Tasks

To implement Sales Offline:

1. Ensure that the user has fully implemented Oracle Field Sales.
2. Ensure that the user meets the prerequisites listed in [Sales Offline Prerequisites](#).
3. Ensure that the customer has licensed Oracle Mobile Field Sales Laptop (ASL) and applied Sales Offline patches using ADpatch.
4. After applying the patches, clear the Jserv cache.
5. If you are implementing Flexfields, refer to [Section 7.4, "Descriptive Flexfield Support"](#).
6. Restart the application server.

7. If SSL or a load balanced environment is used, the configuration for OA_MEDIA needs to be added to the configuration file jserv.properties.

To do this, you can:

- a. Apply TXK patch 2682076 and all its prerequisites
or
- b. Manually edit the configuration file jserv.properties to add this line:
wrapper.bin.parameters=-DOA_MEDIA=
<full path to OA_MEDIA directory>/

7.2 Configuring Tab Display (Optional)

Optionally, you can use the ASL_XLS_MAIN_MENU file to control the display of tabs 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 Field Sales).

7.3 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](#)
- [Price List Lines Profile](#)
- [Field Sales/Laptop Profiles](#)
- [Downloaded Online Application Profiles](#)
- [Quote Profiles](#)
- [Forecasting Profiles](#)
- [Improve Summary Sheet Load Time Profiles](#)
- [Synchronization Profile](#)
- [SSL Profiles and Set Up Test](#)

7.3.1 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 is 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 this profile to N if you do not implement the Service Contract module.
- **ASL: Excel Server Host** - Set this value if you need to override the server name defaulted in Sales Offline template.
- **ASL: Excel Server Port** - Set this value if you need to override the serverport defaulted in Sales Offline template.

7.3.2 User Preference Profiles

These profiles are used for storing user's preference specified in Sync Preferences window. 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

7.3.3 Sync Time Profile

This system profile option is used for storing user's last synchronization.

Note: Do not change this profile option.

- ASL_EXCEL_LAST_SYNC_TIME

7.3.4 Price List Lines Profile

This system profile is used to control the download of price lists to Sales Offline.

- ASL: Download ALL_ITEM Price List Lines

The default is null.

Blank indicates that no price lists will download.

Yes indicates to download price lists that have the Mobile Download checkbox selected and the Product Attribute is set to ALL_ITEMS.

No indicates to download price lists that have the Mobile Download checkbox selected, and to exclude price lists where the Product Attribute is set to ALL_ITEMS.

7.3.5 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

7.3.6 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

See the *Oracle Quoting Implementation Guide* for additional information.

- BNE Servlet Path (see [Section 7.4, "Descriptive Flexfield Support"](#) for 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

See the Oracle Field Sales or Telesales Implementation guides for additional information.

- OSO: Default Country
- OSO: Default Forecast Currency
- OSO: Forecast Max Generate Months

7.3.7 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
- ASO: New Quote Security

See the *Oracle Quoting Implementation Guide* for details.

7.3.8 Forecasting Profiles

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

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

See the *Oracle Field Sales Implementation Guide* for details.

7.3.9 Improve Summary Sheet Load Time Profiles

You can improve the loading speed of the summary sheets by activating the optimization profiles listed below. The profiles can be set at the site, application, responsibility, or user level.

- **ASL: Summary Hyperlink Optimisation**

Controls whether the summary sheet loading hyperlink optimization is activated. By default, this optimization is not activated.

If this profile is set to Yes, the hyperlink optimizations are enabled, and the display screen tip for each hyperlink are removed. A few generic hyperlinks are added to the summary sheets in its place:

- **Detail:** A Click for Details screen tip will appear if you roll your mouse over a hyperlink.
- **Website URL:** A Click to Open Browser screen tip will appear if you roll your mouse over the website hyperlink.
- **Email:** A Click Here to Send E-mail screen tip will appear if you roll your mouse over the E-mail hyperlink.

- **ASL: Summary Auto Fit Optimisation**

Controls whether the summary page loading column auto fit optimization is activated. By default, this optimization is not activated.

If this profile is set to Yes, the columns are set at predefined values selected to optimally accommodate the various data within the columns. The hyperlinks on each summary sheet will have a screen tip associated with it. Roll the mouse over the hyperlink and the values of the hyperlink will display in a screen tip text box. When you click on a cell with contents that have been truncated, a pop-up comment box appear. The pop-up comment box will display the entire contents of the cell. If you have a value that exceeds the predefined column width (primarily in the address column), single click on the cell and a pop-up comment box will appear with the values of that cell.

If the option is not enabled, the application will retain the auto-fit operation and certain columns will dynamically adjust to the widest cell.

7.3.10 Synchronization Profile

Sales Offline uses an asynchronous synchronization process. This asynchronous process enables the user to browse data during synchronization. The application goes into a locked, read-only mode when the user clicks Go Offline. While the user is able to browse the data in Sales Offline while the synchronization occurs, users cannot add, modify, or save data while Sales Offline is in locked, offline mode.

This profile that controls the asynchronous synchronization process.

- **ASL: Enable Sync Engine** - Set this value to Yes to allow data synchronization, and to check whether the current client template is compatible with the current version of the server. The default value is Yes.

This indicates whether synchronization engine is enabled. The synchronization engine performs the synchronization between Sales Offline and Oracle Field Sales. If the synchronization engine is disabled, then no users can perform synchronizations of their offline data to the online database.

This option should be set at the site level. On receiving a synchronization request the ASL Uploader will check this profile option and determine if synchronization is enabled.

If synchronization is not enabled, then the process will immediately return a FAILED status with an appropriate error message.

For example, a system administrator can disable data synchronization for all users during an upgrade by setting this profile value to No. The server checks this value before attempting to start the synchronization process.

This profile value also supports version checking for an incompatible client. In this release of Sales Offline, a numbering system for client version has been introduced, to enable control over which version of the client can synchronize with the server. The client version number will enable the server sync engine to decide if the client is compatible. The user is able to know the version of the client by clicking on the Oracle menu in the spreadsheet to uniquely identify the version of the client being used.

For example, during the upgrade process to the asynchronous Sales Offline template some users may attempt to synchronize using an older client, which does not support the asynchronous architecture. The client will still call the existing `asyProcessSync.jsp` file, however it will simply return a message indicating that the user should upgrade their client.

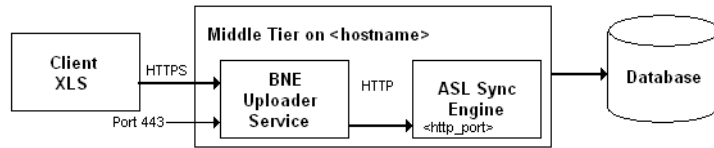
Also, the version checking functionality ensures that if your users are using an outdated version of Sales Offline, they are alerted to download the latest version. Users can check their version of Sales Offline by navigating to Oracle > About Sales Offline.

7.3.11 SSL Profiles and Set Up Test

To use Sales Offline in an environment that includes SSL, set these profiles, which support the Secure Socket layers. Enabling these profiles will allow you to send confidential information over the Internet.

- **ASL: Use Secured Server Connection** - Set this to Yes if SSL is used in your environment.
- **ASL: SSL HTTP Port Number** - Set this option to the value that represents your HTTP port. This value depends on your HTTP security configuration. This profile is applicable only if you use SSL in your environment. Use of this profile is illustrated in an implementation example in [Figure 1, "Sales Offline Synchronization in an SSL Environment"](#).

Figure 1 Sales Offline Synchronization in an SSL Environment



This implementation example features a secure HTTPS connection that is:

- Set up with the middle-tier from the Client XLS
- Uses the URL `https://<hostname>/<file>`. Therefore, the port 443 (the default SSL port) should be enabled on the `<hostname>`.
- Uses a `<hostname>` that is the name of the instance where Sales Offline has been implemented
- Has a `<file>` that is the servlet file path.

Once a secure connection is set up between the Client XLS and the middle tier, a second HTTP connection is initiated from the middle tier to the ASL Sync Engine on the same `<hostname>`. This HTTP connection uses the:

- URL `http://<hostname>:<http_port>/<file>`, where the value of the `<http_port>` is the same value specified for ASL: SSL HTTP port number profile.
- Servlet/JSP file path represented by `<file>`

With these connections, the second HTTP request can be initiated from the middle tier successfully to the `<hostname>` and `<http_port>` (port specified with the ASL: SSL HTTP port number profile).

There should not be any restrictions on making such an HTTP request from the middle tier.

Testing the Set Up of SSL Profiles

For example, if the client is using SSL and the HTTP port value is 443 and the `<hostname>` is `abc.us.oracle.com`, then the values of the following profiles should be set as shown below:

ASL: Use Secured Server Connection: Yes

ASL: SSL HTTP Port Number: 443

To test the network connection, telnet to `<hostname>` and log in. Enter this command:

```
$ telnet <hostname> <http_port>
```

Once connection is established, you should see the following:

```
$ telnet abc.us.oracle.com 443
Trying 111.111.111.111...
Connected to abc.us.oracle.com.
Escape character is '^]'.
```

If there is a restriction in initiating such an HTTP request, then output the system will wait to open a connection and fail eventually with an error message:

```
$ telnet abc.us.oracle.com 443
Trying 111.111.111.111...

telnet: connect to address 111.111.111.111: Connection refused
```

7.3.12 Defaulting Contact and Address Profile

The profile `ASL_DEFAULT_QUOTE_CONTACT` allows for the defaulting of contacts and addresses for quotes.

If this profile is set to 'Yes' at the site level, you can customize your user's quote contacts and addresses based upon the following defaulting logic.

If this profile is not set to Yes, the primary contact from the related opportunity will default; no other defaulting will occur.

Defaulting Business Rules

Sold To Contact

When the user creates the quote, Sales Offline will default the Sold To Contact from the quote header into the Ship To Contact field on the quote header.

Sold To Address

After the ship to contact is defaulted on the quote header, Sales Offline will default the ship to address for the quote header as follows.

If Ship To Party Type is Organization and Ship To Contact is specified, the defaulting sequence for finding the Ship To Address is based on these defaulting rules:

1. Primary Ship To Address type usage for the Ship To Contact that is active
2. Identifying address for the Ship To Contact
3. Primary Ship To Address type usage for the Ship To Customer that is

4. Identifying address for the Ship To Customer

Ship To Contact

When the user creates the quote, the system will default the Sold To Contact from the quote header into the Ship To Contact field on the quote header.

Ship To Address

After the Ship To Contact is defaulted on the quote header, the system will default the ship to address for the quote header as follows.

If Ship To Party Type is Organization and Ship To Contact is specified, the defaulting sequence for finding the Ship To address is based on these defaulting rules:

1. Primary Ship To address type usage for the Ship To Contact that is active
2. Identifying address for the Ship To Contact
3. Primary "Ship To" address type usage for the Ship To Customer that is active
4. Identifying address for the Ship To Customer

Bill To Contact

When the user creates the quote, the system will default the "Sold To Contact" from the quote header into the Bill To Contact field on the quote header.

Bill To Address

After the Bill To contact is defaulted on the quote header, default the Bill To Address for the quote header as follows.

If Bill To Party Type is Organization and Bill To Contact is specified, the defaulting sequence for finding the Bill To address is based on these defaulting rules:

1. Primary "Bill To" address type usage for the Bill To Contact that is active
2. Identifying address for the Bill To Contact
3. Primary "Bill To" address type usage for the Bill To Customer that is active
4. Identifying address for the Bill To Customer

7.4 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 want to 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 the Apache configuration).

7.4.1 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

7.4.2 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

7.4.3 Sales Offline Quoting Flexfields

These quoting flexfields are supported by Sales Offline:

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

7.4.4 Sales Offline Task Flexfields

This task flexfield is supported by Sales Offline:

- Application: CRM Foundation
- Title: Tasks additional information

7.5 Inventory Items Summary Table Synchronization Method

Sales Offline uses a synchronization method to load inventory items into a summarized table via a concurrent request run on the Enterprise database. Instead of running a real-time query (during synchronization) to gather inventory items across multiple tables, the inventory item summarization table is pre-loaded with the inventory items to help improve the synchronization time. This synchronization method useful if you have large sets of inventory items in your Inventory Category Sets.

Concurrent Request for Inventory Items

For large inventory categories, the System administrator should schedule the concurrent program to summarize the inventory items. There are two programs: one is ASL_INVIVC_SUMM (used to summarize categories under non-validated category sets) and the other is ASL_INVVVC_SUMM (used to summarize categories under validated category sets).

For inventory items under categories that have not been summarized (if you choose not to run the Inventory Item summarization concurrent request), the traditional real time download is executed.

Sales Offline Price List display uses the mobile price list flag

Price lists must be setup as "Mobile Download" enabled in order for them to be downloaded and displayed in the Sync Preferences - Quote tab of Sales Offline. In order to set up a price list as Mobile enabled, log in as either Manufacturing Management or Order Management responsibility, navigate to Pricing Manager -> Price Lists -> Price List Setup. Query the desired price list, and check the checkbox "Mobile Download". Save.

If you implement the 'ALL_ITEM' type price list lines, please have the profile ASL:Download ALL_ITEM Price List Lines set to 'Y'. If this profile is set to 'Y', Sales Offline will not download other price list lines, but it will assume that all the items will share the same price for a UOM code.

7.6 Access Records Summary Table Sync Method

Sales Offline uses a summary table synchronization method for downloading access records. These record include:

- Organizations
- Persons
- Opportunities
- Leads

This synchronization mechanism loads the user's access records into a summarized table via a concurrent request which runs on the Enterprise database. Instead of running a real-time query (during synchronization) to include the user's access data across multiple tables, the access summarization table is pre-loaded with each user's access data to improve synchronization time.

8 Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.