

Oracle® Sales Offline

Implementation Guide

Release 11*i*

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Send Us Your Comments

Oracle Sales Offline Implementation Guide, Release 11i

Part No. B14390-02

Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Sales Offline Implementation Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Sales Offline
- Oracle Field Sales (formerly known as Oracle Sales Online)
- Oracle Sales
- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the Oracle Applications User's Guide.

How To Use This Guide

This document contains the information you need to implement Oracle Sales Offline.

- Chapter 1 provides an introduction to Oracle Sales Offline and describes features of the interface, and discusses overall implementation tasks.
- Chapter 2 describes the implementation tasks for Oracle Sales Offline and lists the profile options.
- Appendix A describes the Upload MyChanges Synchronization.
- Appendix B describes the defaulting business rules for Oracle Sales Offline.
- Appendix C describes descriptive flexfield support.
- Appendix D describes synchronization methods.

See Related Documents on page viii for more Oracle Applications product information.

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Structure

- 1 Introduction**
- 2 Implementing Oracle Sales Offline**
 - A Upload MyChanges Synchronization**
 - B Defaulting Business Rules**
 - C Descriptive Flexfield Support**
 - D Synchronization Methods**

Related Documents

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Sales Offline. If this guide refers you to other Oracle Applications documentation, use only the Release 11i versions of those guides. Online Documentation All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink. Related Documentation Oracle Sales Offline shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Sales Offline. You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides. If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Sales Offline (and any other Oracle Applications products). This guide also includes information on setting user

profiles, as well as running and reviewing reports and concurrent processes. You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Sales Offline User Guide

This guide provides how to use Oracle Sales Offline.

Oracle Field Sales User's Guide

This guide explains Oracle Field Sales, an HTML-based application that provides sales managers, sales representatives, and sales executives with assistance in managing their business opportunities, customer, forecasting, incentive compensation, partners, and quotes.

Oracle Sales User Guide

This guide explains Oracle Sales, a comprehensive solution for planning, managing and optimizing activities across all sales channels. It allows automation of the entire sales cycle, including account and contact management, opportunity management, forecasting and pipeline analysis, and order management.

Oracle Quoting User Guide

This guide explains how to use Oracle Quoting to create and manage customer quotes across all sales and interaction channels. Oracle Quoting is used to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle. Users can publish and print quotes, and eventually convert quotes to orders.

Installation and System Administration Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i.

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 concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the Oracle Applications User Interface Standards for Forms-Based Products. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sales Offline implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support Training

Oracle offers training courses to help you and your staff master Oracle Sales Offline and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility. Support From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sales Offline working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

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by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Introduction

This chapter covers the following topics:

- Introduction
- Template Versioning and Upgrading Oracle Sales Offline Templates
- Oracle Field Sales Access
- Oracle Sales Access
- Pop-up Date Chooser For Oracle Sales Offline Task Module
- Common Product Catalog
- Multilanguage Support (MLS)
- Downloading the Oracle Sales Offline Application
- Troubleshooting Tips
- Version and Template Identification
- Status Bar Messages
- Timing Log
- Multiple Mid-Tier Instance

Introduction

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

Template Versioning and Upgrading Oracle Sales Offline Templates

Before you upgrade Oracle Sales Offline with the latest patch, be sure to inform the Oracle Sales Offline users that they must:

1. Synchronize Oracle Sales Offline to upload any outstanding changes in the template, and then resolve any outstanding Conflict, or Non-Validated records in Sales Offline. Perform another synchronization if necessary.
2. Download a new Oracle Sales Offline template after the patch has been applied.

If users do not do so, they will not be able to synchronize using an older template after the patch is applied.

Oracle Field Sales Access

Users 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.

Oracle Sales Access

Users should have access to Oracle Sales in order to download the Oracle Sales Offline template. This requires the user to have a valid Sales responsibility. See the *Oracle Sales Implementation Guide* for details.

Pop-up Date Chooser For Oracle Sales Offline Task Module

Sales Offline supports a pop-up date chooser for the Calendar. 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 user computers, so verify this first. the pop-up date chooser is only available on Microsoft Excel 2000.

Common Product Catalog

Oracle Sales Offline supports the common product catalog, which is used by all Sales applications. In the past, product categories were limited to interest type, primary codes, and secondary codes. Using the common product catalog, multiple levels of product categories are possible based on implementation needs. Product catalog security is inherited from the security set in Oracle Field Sales.

The common product catalog is part of Oracle Product Lifecycle Management and manages product hierarchy. The product catalog is set up in Oracle Product Lifecycle Management. A hierarchical catalog called Product is seeded for use by Sales and Marketing. Users can either use this seeded catalog or create a new product hierarchical catalog with Product Categories. See the *Oracle Product Lifecycle Management Administrators Guide* for details.

For information on setting up the product catalog, upgrading from a previous release, and mapping interest types, see the *Oracle Field Sales Implementation Guide*.

Multilanguage Support (MLS)

Oracle Sales Offline is MLS compliant. Multilanguage support includes:

- **Language Data Handling:** Support for characters from any language as data in the application.
- **Locale Formatting:** Support for local formats for date, time, number, address, and name.
- **Search and Sort:** Support for locale-specific searches and sorting.

Downloading the Oracle Sales Offline Application

Users must download Oracle Sales Offline from Oracle Field Sales or Oracle Sales before using the application for the first time.

When using Oracle Sales Offline in conjunction with Oracle Sales, the system administrator must perform the following manual post install steps in order to enable the Sales Offline Template Download page under the Oracle Sales, Preferences tab, where users can download the Oracle Sales Offline application:

- Add Sales Offline Preference Menu (ASL_PREFERENCE_MENU) as a submenu under Sales Dashboard Home Page Menu (ASN_HOME_MENU).
- After the submenu is saved, you must bounce the server in order for the new menu addition to appear. After this is done, users logging in using an Oracle Sales responsibility can click on the Preferences link and access the Oracle Sales Offline Template Download page.

To download Oracle Sales Offline:

1. Log into Oracle Field Sales, with a valid Sales user responsibility. If using Oracle Sales Offline in conjunction with Oracle Sales, log into Oracle Sales with the Oracle Sales User responsibility.
2. In Oracle Field Sales, click the Mobile tab. In Oracle Sales, click the Preferences tab.
3. Create a new folder in a directory.
4. In Oracle Field Sales, download Oracle Sales Offline by clicking the Download Sales Offline Template link. In Oracle Sales, click on the Sales Offline Template Download link, and then click on **Click here to download Sales Offline template**.
5. Navigate to the downloaded file SalesOffline.zip in the directory.
6. Unzip the file into a folder.
7. Run Oracle Sales Offline by double-clicking 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 users synchronize.
11. Enter the download criteria by choosing the Territory Driven, Sales Team Driven, or Forecast Driven download. Territory Driven download and Forecast Driven download are not available in Oracle Sales Offline when being used in conjunction with Oracle Sales.

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. This type of download is only available in the Oracle Sales Offline/Oracle Field Sales compatible version.

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 Oracle 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. This type of download is only available in the Oracle Sales Offline/Oracle Field Sales compatible version.

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

- **Forecast Preferences** (only available in the Oracles Sales Offline/Oracle Field Sales compatible version) - can be filtered by Period Type, Category, Start Period and End Period, Credit Type
- **Customer Preferences** - can be filtered by Customer Category, Country, State

Troubleshooting Tips

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

Oracle Sales Offline Fails at the Macros

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

Suggestions for Reporting Users Reporting Problems

Provide the following information to expedite problem resolution:

- ASL Debug log. See General System Profiles, page 2-2 for details on setting up an error log.
- Screen capture or details from the Sync Details dialog box.
- Error log from the client. See Timing Log, page 1-5 for details on setting up detailed logging.

Version and Template Identification

Oracle Sales Offline provides a version number that 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.

Each downloaded Oracle 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 do not 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 11.5.10.12, and then later download template version 11.5.10.14. 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.

Status Bar Messages

Status bar messages display during file open, synchronization, file save, and file close operations. 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' is displayed.

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

Timing Log

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

- Opening a file
- Synchronizing data
- Saving a file

These statistics enable you to analyze Oracle Sales Offline's performance and identify issues that may arise when records are processed.

Enabling Detailed Logging

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

Steps

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 the current session.

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

The next time the user synchronizes data, Oracle Sales Offline will write detailed logging information about the 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 Oracle Sales Offline. The timing log file is called aslclient.log.

Note: Each time a user open the Oracle Sales Offline template, the .log file is copied to a .bak file, and the .log file is cleared. To view the current timing log, you must look at the log file in the logs directory before the template is opened.

Logging for a Full or Incremental Synchronization

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

Steps

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

Multiple Mid-Tier Instance

If you have a multiple mid-tier instance, you must set two BNE profiles in order for Oracle Sales Offline to correctly synchronize the user's data files. To do this, follow these steps:

1. Create a shared directory for the multiple mid-tiers. Creating this shared directory will enable the Sales Offline synchronization architecture to properly find, and download each users data file(s).
2. Choose this shared directory in the two profiles: BNE Upload Staging Directory and BNE Upload Import Directory. These profiles will help the client locate the correct directory in order to download the users data file(s).

Implementing Oracle Sales Offline

This chapter covers the following topics:

- System Administration Tasks
- Configuring Tab Display (Optional)
- Setting System Profile Options for Oracle Sales Offline

System Administration Tasks

To implement Oracle Sales Offline:

1. Ensure that the user has fully implemented Oracle Field Sales or Oracle Sales.
2. Ensure that the customer has licensed Oracle Mobile Field Sales Laptop (ASL) and applied Oracle Sales Offline patches using ADpatch.
3. After applying the patches, clear the Jserv cache.
4. If you are implementing Flexfields, refer to Descriptive Flexfield Support, page C-1.
5. Restart the application server.
6. 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:

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

Configuring Tab Display (Optional)

Optionally, you can use the ASL_XLS_MAIN_MENU file to control the display of tabs in Oracle 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 in the desired sequence (determined by the Seq field).
- To remove a tab, clear 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 Oracle Sales Offline users. Menu and function exclusion defined at Responsibility level are not considered when rendering tabs in Oracle Sales Offline. An exception is the ASL_EXCEL_MENU menu, which is used for the Mobile tab (accessible from Oracle Field Sales).

Setting System Profile Options for Oracle Sales Offline

This section describes the system profile options used by Oracle 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, page 2-2
- User Preference Profiles, page 2-3
- Synchronization Time Profile, page 2-4
- Price List Lines Profile, page 2-4
- Field Sales/Laptop Profiles, page 2-4
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- SSO Profiles, page 2-12
- Defaulting Contact and Address Profile, page 2-12

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 a log file on the server when a user downloads a new Oracle Sales Offline template or performs a synchronization in Oracle Sales Offline. 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, along with a log type. The format of the file name is ASL_<username>_<log-type>_<sessionID>.log.

The <log-type> specifies whether the user downloaded a new Oracle Sales Offline template (specified with a log type of T) or performed a synchronization (specified with a log type of S).

For example:

ASL_LJONES_S_12223422222.log (performed a synchronization)

or

ASL_LJONES_T_1232345562.log (downloaded a new template)

With this logging enabled, the log file created during a synchronization is compressed into ServerLogs.zip and this file is copied into the client logs directory located where the Oracle Sales Offline template was downloaded.

- **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 Oracle Sales Offline template.
- **ASL: Excel Server Port** - Set this value if you need to override the serverport defaulted in Oracle Sales Offline template.
- **ASL: Turn On SQL Trace** - If set to Yes, a SQL trace file is created for each synchronization in Oracle Sales Offline.
- **ASL: Remove Upload My Changes Checkbox** - Set this profile to Yes if you do not use the Upload MyChanges functionality in Sales Offline. This will remove the 'Upload MyChanges' checkbox from the Sync Login pop up form of Oracle Sales Offline.

User Preference Profiles

These profiles are used for storing user preferences specified in the Sync Preferences window. No setup is required. Do not 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

Synchronization Time Profile

This system profile option is used for storing user's last synchronization. Do not change this profile option.

- ASL_EXCEL_LAST_SYNC_TIME

Price List Lines Profile

This system profile controls the download of price lists to Oracle 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.

Field Sales/Laptop Profiles

These system profile options are used in Field Sales/Laptop. They are obsolete, and not required for use in Oracle 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

Oracle Sales Offline/Oracle Sales Profiles

In order for Oracle Sales Offline to recognize that Oracle Sales has been properly established and turned on in the customer's instance, the profile OS: Activate Sales Interoperability must be set to Yes. When this profile is set to yes, the Forecast tab will not be available for mobile users in Oracle Sales Offline. Users also cannot submit forecast values at the Opportunity line level for any Opportunity. The Opportunity header forecast value is not available in Oracle Sales Offline.

The Task date type, which will appear on the Sales Offline Task detail and create forms corresponds to the date type setup in the profile, Task Manager : JTF Tasks default date selected. The date type rows that do not correspond to the date type in this profile above will be dynamically disabled in the Task detail and create forms, as well as, the Task conflict and non validated record forms. The Start Time and End Time components will be removed from the Task detail and create forms, as well as, the Task summary sheet and Calendar form.

Oracle Sales Offline does not support the existing Data Quality Management (DQM) features used in Oracle Sales. The following profile options allow customers to turn off the creation of Customers (Organizations, Persons and Contacts) in Oracle Sales Offline. If these profile options are turned on, the Create buttons for Organizations, Persons and Contacts will be disabled.

- ASL: Remove Organization Create Button

Example

When set to Yes, the Organization Create buttons will be removed in Oracle Sales Offline.

- ASL: Remove Person Create Button

Example

When set to Yes, the Person Create button will be removed in Oracle Sales Offline.

- ASL: Remove Contact Create Button

Example

When set to Yes, the Contact Create button will be removed in Oracle Sales Offline.

Additionally, Oracle Sales Offline and Oracle Sales have separate sets of profile options that do not affect the other application. Therefore, when a feature in Oracle Sales is dependent on a profile option, setting the Oracle Sales profile option will not affect Oracle Sales Offline. You must set the corresponding Oracle Sales Offline profile option separately.

Note: Corresponding profile options may have slightly different values. You should choose a value supported by both, if you want the behavior to be the same. Additionally, there may be Oracle Sales profile options for which there are no corresponding Oracle Sales Offline profile options. You should set these profile options to mimic Oracle Sales Offline behavior, or Oracle Sales should be personalized to mimic Oracle Sales Offline behavior.

Mapping of Oracle Sales Offline and Oracle Sales Profile Options

Profiles Used By Oracle Sales Offline	Oracle Sales Profile
OS: Default Opportunity Win Probability	ASN: Default Opportunity Win Probability
ASO: Default Sales Channel	ASN: Default Opportunity Sales Channel
OS: Default Opportunity Status	ASN: Default Opportunity Status
OS: Default Close Date Days	ASN: Default Close Date Days
OS: Default Win/Loss Status	ASN: Default Win/Loss Status
OS: Default Status for Leads	ASN: Default Lead Status

Setting Oracle Sales Offline Profiles

Additionally, some ASL profile options and lookups must be set in order to interoperate with Oracle Sales. If you do not set these profiles as suggested, you will not be able to use Oracle Sales with Oracle Sales Offline.

Profile Name	Value
OS: Activate Sales Interoperability	Yes or No - Must be set to Yes in order for Oracle Sales Offline to work with Oracle Sales.
Task Manager : JTF Tasks default date selected	Actual, Planned, or Scheduled
OS: Lead Link Status	Converted to Opportunity
ASL: Remove Organization Create Button	Yes or No
ASL: Remove Person Create Button	Yes or No
ASL: Remove Contact Create Button	Yes or No

Setting Oracle Sales Offline and Oracle Sales Lookups

The following table lists the lookup values that are applicable to Oracle Sales Offline. These lookup values must be mapped and matched to the corresponding Oracle Sales lookup values for the correct value sets to be displayed. In order for Oracle Sales Offline to recognize that Oracle Sales has been properly established and turned on, the profile OS: Activate Sales Interoperability must be set to Yes.

Oracle Sales Offline Lookup Used	Oracle Sales Lookup
CLOSE REASON	ASN_OPPTY_CLOSE_REASON
OPP_CONTRACT_ROLE and LEAD_CONTACT_ROLE	ASN_CONTACT_ROLE
OPP_STATUS	ASN_WIN_LOSS_STATUS
CLOSE REASON	ASN_LEAD_CLOSE_REASON

Downloaded Online Application Profiles

Oracle 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 (if this profile is set to any value other than Draft, Oracle Sales Offline will ignore this value when a quote conflict with the status Oracle Sales Offline Error is resolved and return the status Draft)
- ASO: Default Sales Channel
- ASO: Quote Duration
- ASO: Validate Salesrep
- See the *Oracle Quoting Implementation Guide* for additional information.
- BNE Servlet Path (see Descriptive Flexfield Support, page C-1 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
- OS: Lead Link Status
- OS: Activate Sales Interoperability

- Task Manager: JTF Tasks default date selected
- See the Oracle Field Sales or Telesales Implementation guides for additional information.
- OSO: Default Country
- OSO: Default Forecast Currency
- OSO: Forecast Max Generate Months

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.

Forecasting Profiles

This section applies only if you are utilizing the Oracle Sales Offline/Oracle Field Sales compatible version. If you are implementing Forecasting 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.

Opportunity Profile

This profile controls whether a user gets a warning message or an error message when the combination of the Sales Methodology, Sales Stage, and Win Probability information does not pass validation.

- AS_OPPTY PROB_SS_LINK

Valid values are Warning and Error.

If the value is set to Warning, and any of the Sales Methodology, Sales Stage, and Win Probability information that the user has entered is invalid, the user will see a warning message and the opportunity will be updated.

If the value is set to Error, and any of the Sales Methodology, Sales Stage, and Win Probability information that the user has entered is invalid, the user will see an error message and the opportunity will not be updated.

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 move 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. Move 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.

Synchronization Profile

Oracle Sales Offline uses an asynchronous synchronization process. The application goes into a locked, read-only mode when the user clicks Go Offline. Users cannot add, modify, or save data while Oracle Sales Offline is in locked, offline mode.

This profile 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 Oracle 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.

You 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. There is a numbering system for the Sales Offline client to enable control over which version of the client can synchronize with the server. The client version number will enable the server synchronization engine to decide if the client is compatible. The user can display 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 Oracle 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.

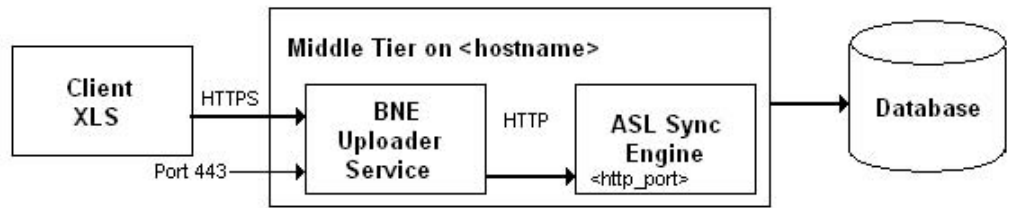
Also, the version checking functionality ensures that if your users are using an outdated version of Oracle Sales Offline, they are alerted to download the latest version. Users can check their version of Oracle Sales Offline by navigating to Oracle > About Sales Offline.

SSL Profiles and Set Up Test

To use Oracle 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.

Oracle 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 Oracle 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
```

SSO Profiles

Oracle Sales Offline uses standard Oracle application foundation (FND) to complete the user login and authentication. Sales Offline is a disconnected application that does not use the normal login process and cannot display the html challenge page during the synchronization process. In order to enable Oracle Sales Offline users to work in an SSO environment, the passwords need to be stored in the FND_USER as well, and this must be implemented by setting the profile, Application SSO Login Types, to Both or Local.

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 on business rules as outlined in Appendix B, page B-1.

If this profile is set to No, the primary contact from the related opportunity will default; no other defaulting will occur.

Upload MyChanges Synchronization

This appendix covers the following topics:

- Upload MyChanges
- Synchronization Phases for Upload MyChanges
- Upload MyChanges and the Overall Synchronization Process

Upload MyChanges

Upload MyChanges is an alternative to a full or incremental synchronization for users who want to upload only the changes they have made in Oracle Sales Offline.

Note: The user must perform a full synchronization after downloading a new Oracle Sales Offline template.

The profile, ASL: Remove Upload MyChanges Checkbox, allows for the removal of the Upload MyChanges checkbox from the Sync pop up form. If the profile is set to Yes, the Upload MyChanges checkbox from the Sync Login pop up form of Oracle Sales Offline will be removed. The default value for this profile is 'N'.

These are the differences between the full or incremental synchronization and the Upload MyChanges synchronization using the existing ASL asynchronous architecture.

- **Querying the database (aslUploadEngine.jsp):** Only records from Oracle Field Sales or Oracle Sales with corresponding conflicts in Oracle Sales Offline (created during the current Upload My Changes synchronization) are downloaded
- **Bne LOV Sync:** Flex fields are not downloaded during an Upload My Changes synchronization
- **Load Data:** Only conflicts returned from Oracle Field Sales or Oracle Sales will be merged with existing data in Oracle Sales Offline for an Upload My Changes synchronization
- **Upload MyChanges Operations:** An Upload MyChanges synchronization will not download profile values, lookups and other similar information, and is limited to the following operations:
 - Uploading new and modified records
 - Retrieving associated primary keys for successfully created records
 - Retrieving non validated and conflicting records

Synchronization Phases for Upload MyChanges

Oracle Sales Offline synchronization has several phases. These are detailed in the following subsections.

Upload Phase

The ASL:uploadOnly parameter is sent to the server indicating an Upload MyChanges synchronization should be performed. This parameter will be sent during the upload phase on the client and will be available for access by the server. The ASL:uploadOnly parameter derives its value from the Upload Only property of the SyncController class.

Synchronization preferences will still be sent to the server, although are ignored for an Upload MyChanges synchronization.

Download Phase

FlexField structures and value sets will not be downloaded during an Upload MyChanges synchronization.

The latest version of records from the online sales applications associated with any new, modified or conflicting records from Oracle Sales Offline must be downloaded.

Loading Phase

During an Upload MyChanges synchronization any new records successfully created in the database will have their primary key replaced with the key returned from the server. These records will also have their last update data field replaced with the last update field returned from the server.

During an Upload MyChanges synchronization, any records in conflict is removed from their associated data sheet and merged with existing conflicts in the rejected sheet. This ensures that when a user opens a conflict resolution form the online version of the record is not displayed.

For new records, this functionality is provided if the primary key returned in the sequence map CSV, then the record is deleted from its associated data sheet. For conflicts associated with modified records, the offline record must be explicitly deleted from its associated data sheet.

Upload MyChanges and the Overall Synchronization Process

Most of the processing that occurs during a full or incremental synchronization must occur for an Upload MyChanges synchronization. However, during an Upload MyChanges synchronization, these phases are not performed:

- **Retrieving and processing synchronization preferences:** Synchronization preferences allow a user to restrict the number and type of records that are downloaded during a full or incremental synchronization. An Upload MyChanges synchronization retrieves only conflicts and primary keys for new records, synchronization preferences are not required.
- **Running download queries:** No download queries, with the exception of conflict retrieval will be performed during an Upload MyChanges synchronization.
- **Update last synchronization time:** During a full or incremental synchronization the current synchronization time is stored so that, during the next synchronization (full or incremental), only records created or updated after the last synchronization are downloaded. During an Upload MyChanges synchronization the last

synchronization time will not be modified ensuring all records created or updated since the last synchronization (incremental or full) will be downloaded during the next one.

The following phases will be performed during an Upload MyChanges synchronization:

- **Download primary keys:** Server primary keys for records created during an Upload MyChanges synchronization is downloaded.
- **Last Update Date:** Records created during an Upload MyChanges synchronization must have their last update date field downloaded to Oracle Sales Offline. This will ensure that the record can be successfully modified during the next full, incremental or Upload MyChanges synchronization.
- **Retrieve Conflicts:** Only conflicts created during an Upload MyChanges synchronization will be retrieved to ensure that data downloaded is kept to a minimum.
- **Loading Data:** Primary keys for successfully created records will be merged during the load phase on the client and any non-validated records will be deleted from their associated data sheet during an Upload MyChanges, full or incremental synchronization. Any records in conflict after a synchronization must be deleted from their associated data sheet during an Upload MyChanges synchronization only. This is required as records in conflict are usually replaced by the online version during a full or incremental synchronization allowing a user to perform conflict resolution.

Example 1

A user creates a task with a status of In Planning in Oracle Sales Offline and performs an Upload MyChanges synchronization. During the Upload MyChanges synchronization the status of a task is changed to a value of On Hold by the Sales Online API. Oracle Field Sales/Oracle Sales and Oracle Sales Offline show different values for the status of the task.

Upon completion of the Upload MyChanges synchronization the user chooses to modify the description of the task, which still has a status of In Planning in Oracle Sales Offline and performs a full synchronization. During the synchronization, the status of the task will again be changed from In Planning to On Hold and the task show the same status in both Oracle Sales Offline and Oracle Field Sales/Oracle Sales.

Example 2

A user modifies an existing opportunity in Oracle Sales Offline by changing the win probability field from a value of 10 to a value of 20. In Oracle Field Sales/Oracle Sales another user modifies the sales team of the same opportunity.

The user performs an Upload MyChanges synchronization and the opportunity is successfully updated as the changes were made on two different levels (header versus sales team). The Sales Team tab for the opportunity in Oracle Sales Offline contains a value other than that displayed in Oracle Field Sales/Oracle Sales. If the Oracle Sales Offline user updates the Sales Team tab of the opportunity and performs another synchronization then a conflict (on the sales team record) will occur and the header will be successfully updated.

Defaulting Business Rules

This appendix covers the following topics:

- Sold To Contact
- Sold To Address
- Ship To Contact
- Ship To Address
- Bill To Contact
- Bill To Address

Sold To Contact

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

Sold To Address

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

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

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

Descriptive Flexfield Support

This appendix covers the following topics:

- Descriptive Flexfields
- Oracle Sales Offline Opportunity and Lead Flexfields
- Oracle Sales Offline Organization and Contact Flexfields
- Oracle Sales Offline Quoting Flexfields
- Oracle Sales Offline Task Flexfields

Descriptive Flexfields

Oracle 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 Oracle 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).

Oracle Sales Offline Opportunity and Lead Flexfields

These opportunity and lead flexfields are supported by Oracle Sales Offline:

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

Oracle Sales Offline Organization and Contact Flexfields

These customer organization flexfields are supported by Oracle Sales Offline:

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

Oracle Sales Offline Quoting Flexfields

These quoting flexfields are supported by Oracle Sales Offline:

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

Oracle Sales Offline Task Flexfields

This task flexfield is supported by Oracle Sales Offline:

- Application: CRM Foundation
- Title: Tasks additional information

Synchronization Methods

This appendix covers the following topics:

- Inventory Items Summary Table Synchronization Method

Inventory Items Summary Table Synchronization Method

Oracle 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 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_INVVC_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), real-time download is executed.

Oracle Sales Offline Price List Display with 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 in Oracle 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 select the checkbox Mobile Download and then save.

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

