

Oracle® Sales for Handhelds

Implementation Guide

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Introduction

Overview of Oracle Sales for Handhelds

Oracle Sales for Handhelds complements the online and disconnected editions of Oracle Sales application by providing users with real time sales information on the road and synchronization capabilities.

Connected Handheld Browser

The connected browser on the handheld device provides real time access to enterprise information. Users can use a web browser available in handheld devices to manage:

- Customers and contacts
- Opportunities
- Tasks and appointments

The supported browsers are:

- Pocket PC handheld devices running Pocket IE on Windows Mobile 2003
- Palm based handheld devices running Blazer 3.0 browser or higher
- Nokia running Internet Browser for HTML 4.01/xHTML on Symbian 7.OS operating system

Oracle Sales Synchronization

Users can use Oracle Sales synchronization to synchronize information between laptop, desktop, or Pocket PC devices and the eBusiness Suite. Oracle Sales Synchronization can be used to synchronize:

- Appointments
- Tasks
- Contacts

Synchronization functionality is provided specifically for:

- Pocket PC devices running Windows Mobile 2003
- Laptops or desktops with Windows 2000 or Windows XP clients running Outlook 2000, Outlook 2002 (XP), Outlook 2003

Devices and Supported Functionality

Oracle Sales for Handhelds currently utilizes a blended model for providing enterprise data on handheld devices. Oracle Sales Synchronization provides enterprise information directly into Microsoft Outlook and Pocket PC devices. The Oracle Sales for Handhelds connected pages

provide enterprise information via an HTML browser and OA framework. The following matrix discusses which devices can be used with the Oracle Sales for Handhelds functionality.

Device	Direct Synchronization	Connected Pages
Microsoft Pocket PC Devices (Windows Mobile CE, XScale or ARM Processors only)	Yes	Yes
Microsoft Smartphone Devices (Windows Mobile SE)	No	Yes
Palm OS (Blazer Browser)	No	Yes
Nokia Communicator (Symbian OS with Opera browser support)	No	Yes
Nokia Smartphone (Symbian OS without Opera browser)	No	No
RIM Blackberry (Blackberry Browser)	No	No

Note that wherever direct synchronization is not provided, synchronization can still be done by synchronizing to Desktop Outlook and using the appropriate Outlook connector.

Mandatory Dependencies

The connected handheld browser requires the following Oracle Application:

- Oracle Sales: See the *Oracle Sales Implementation Guide*

The Microsoft Outlook Synchronization requires the following Oracle application:

- Oracle Sales: See the *Oracle Sales Implementation Guide*

Common Implementation Steps

Synchronize Employees

The Oracle Common Application Components concurrent program *Synchronize Employees* synchronizes HR employee information with Resource information. It must be run whenever new users are added. Use the CRM Administrator responsibility to run this concurrent program.

Data Quality Management Setup

Oracle Sales for Handhelds utilizes Data Quality Management for customer and contact searches.

Steps:

1. Set the profile option *HZ: Enable DQM Party Search* to Yes.
2. Use the Trading Community Architecture responsibility to run the concurrent program *DQM Staging Program* to create the staged schema and intermedia index.

3. Use the Trading Community Architecture responsibility to schedule the concurrent program *DQM Synchronization* on a short interval. This program synchronizes the new data coming into the system.
4. Use the Trading Community Architecture responsibility to schedule the concurrent program *DQM index optimization program* on a regular interval, such as daily.
5. Use the Trading Community Architecture responsibility to run the concurrent program *DQM Compile Match Rules* to compile all the defined match rules.
6. Set the following profile options with appropriate matching rules for customer and contact search:

Function	Profile Option	Default Value (Matching Rule)
Customer Search	HZ: Match Rule for Organization Simple Search	HZ: Organization Simple Search Match Rule
Contact Search	HZ: Match Rule for Contact Simple Search	HZ: Person Simple Search Match Rule
Contact Create	HZ: Match Rule for Organization Duplicate Prevention HZ: Match Rule for Contact Duplicate Prevention	SAMPLE: SEARCH

Appointment Preferences

Responsibility: Sales User

Set Preferences > General Timezone to the time zone to be displayed in the appointment pages.

Set Preferences > Calendar Preferences > Default Settings Categories to the category you want to be the default for appointments.

Seeded Roles and Responsibilities

The following responsibilities are shipped with Oracle Sales for Handhelds:

- Wireless Sales User
- Wireless Sales Administrator

Custom responsibilities can be setup using standard eBusiness suite functionality.

Implementation Steps for the Connected Browser Functionality

Setting Up Sales for Handhelds Profile Options

Setting the following profile options is not mandatory:

- **ASP: Calendar date range**

This profile determines the number of days for which the events are listed on the dashboard

Default: 3

- **ASP: Maximum number of characters displayed**

This profile determines the number of characters to be displayed for the data after which the data is truncated.

Default: 35

Customizing Action Lists

Use lookups to customize the search choice list on the Dashboard page and the action selection list on other pages. Following are the lookup types and the related page.

Page Name	Lookup Type
Dashboard Quick Search	ASP_HOME_QSEARH_TYPE
Contact Landing Page	ASP_CTLAND_PG_NAV
Contact: More Phone/Email Pages	ASP_CTPHEM_PG_NAV
Customer Landing Page	ASP_CULAND_PG_NAV
Opportunity Landing Page	ASP_OPP_LAND_PG_NAV
Appointment Details Page	ASP_APT_DET_PG_NAV
Task Details Page	ASP_TASK_DET_PG_NAV

Personalizing the User Interface

Oracle Sales for Handhelds allows administrators to personalize the user interface. Out of the box, some of the user interface elements such as tables, table columns, and record fields are hidden to optimize user experience for smaller handheld device screens. Administrators can change these settings to suit their business needs.

To personalize a page, access the application using Wireless Sales Administrator responsibility on a desktop browser. Personalization can not be done on the handheld device browsers.

The ability to personalize is controlled by the profile option *Personalize Self-Service Defn*. There are five levels of personalization:

- **Function:** Affects all users with a particular function
- **Localization:** Affects all end users for a particular location
- **Site:** Affects all users of the current installation
- **Organization:** Affects all users for a particular business unit (Org)
- **Responsibility:** Affects all users within a particular responsibility.

Example

For example, you can customize the user interface in the following ways:

- Hide or show regions, fields, and entire tables
- Change the order of regions and fields on a page
- Change field labels and region headers
- Make fields mandatory
- Make fields read-only
- Use cascading style sheets
- Define default values

- Provide tip text
- Add fields to a region

For complete information on customizing the user interface, refer to the *Oracle Applications Framework Personalization Guide*.

Implementation Steps for Outlook Synchronization Functionality

Setting Mandatory Profile Options

Set the following profile options for the synchronization with Pocket Outlook and Desktop Outlook:

- **CAC Sync: Contact Sync Mode**

Determines if contacts can be synchronized both ways or download only. Choices are Disabled, Download Only, and Two Way.

Level: Site and application

Default: Download Only at the site level, Two Way at the application level for ASP (Oracle Sales for Handhelds)

- **CAC Sync: Include Details**

If set to yes, then appointments that are synchronized include appointment details in the body notes.

Level: Application

Default: Yes for ASP

- **CAC Sync: Include Links**

If set to yes, then contacts and appointments synchronized to the offline device include links to related pages. If set to yes, then *CAC Sync: Include Details* must also be set to yes.

Level: Application

Default: Yes for ASP

- **CAC Sync: Include Tasks Without Date**

If set to yes, then tasks without due dates are included in the synchronization for the user.

Level: Site and application

Default: Yes at site level, No at application level for ASP

- **CAC Sync: Contact Data Security Definition**

For the Oracle Sales for Handhelds and the Oracle Sales applications, set the value to: `oracle.apps.asp.common.util.server.CustomerSecurityAM`

This enables adding contacts as attendees for appointments. It enables the Add Contact button in the Create Appointments page in Oracle Sales.

Default: None

Setting Optional Profile Options

You can change the following profile options.

- **CAC: Maximum number of Contact Preferences for each user**

Users create lists of contacts to include during synchronization. This profile sets the maximum number of contacts for all users.

Level: Site

Default: 200

- **CAC Sync: Appointments Category**

When appointments are synchronized between Common Application Calendar (CAC) and Pocket PC or Desktop Outlook, the appointments from Oracle Sales are placed in the category specified in this profile option. If this profile option is changed after the initial implementation, then users must perform a Full Synchronization.

Level: Site

Default: Oracle Appointments

- **CAC Sync: Contacts Category**

When contacts are synchronized between Common Application Calendar and Pocket PC or Desktop Outlook, the contacts from Oracle Sales are placed in the category specified in this profile option. If this profile option is changed after the initial implementation, then users must perform a Full Synchronization.

Level: Site

Default: Oracle Contacts

- **CAC Sync: Tasks Category**

When tasks are synchronized between Common Application Calendar and Pocket PC or Desktop Outlook, the tasks from Oracle Sales are placed in the category specified in this profile option. If this profile option is changed after the initial implementation, then users must perform a Full Synchronization.

Level: Site

Default: Oracle Tasks

- **CAC Sync: Days Before**

The number of days set here determines the number of past days for which tasks and appointments are synchronized from the server to the client during initial (full) synchronization. Tasks and appointments due or occurring within the previous x days as well as tasks and appointments due or occurring anytime in the future are included. Recommend using between 7 and 21 days. There are no limits for synchronizing from the client to the server.

Level: Site. This profile can also be set by users.

Default: 14

Concurrent Programs

Purge Synchronization Data Concurrent Program

Schedule the concurrent program CACSYNCP to permanently delete data for obsolete devices or users. The Expiry parameter sets the number of days, with a default of 180. Data that has not been updated for longer than the expiry value is purged.

Deleting Invalid Contacts Concurrent Program

The concurrent program *Delete Invalid Contacts from User Preference* checks for the status of the contacts in the contact list. The program checks whether

1. The contacts in the download list are active contacts
2. The user is a member of the customer sales team

Schedule this concurrent program to run periodically to keep the contacts in the users' contact lists current.

Enabling Outlook Preferences Menu

This menu contains the functions for setting up the contact list and downloading clients.

Add the submenu for Outlook Synchronization to the ASN menu ASN_HOME_MENU. The submenu to add is ASP: Outlook Synchronization Preferences Container Menu (ASP_OUTLOOK_SYNC_PRF_CONTAINER).

Downloading and Installing the Pocket PC Synchronization Client

To use the synchronization with Oracle Sales you need to install the client on your Pocket PC.

Prerequisites

- You need the Wireless Sales User responsibility

Steps:

1. Open Internet Explorer on your handheld device.
2. Go to the URL for Applications login for your environment.
3. Enter your username and password. You are taken directly to Oracle Sales.
4. Select Pocket Outlook Client Download from the menu.
5. Click the link for Step 1 in the browser page.
6. In the Download window, deselect Open File After Download. Download the file.
7. In the browser page, select the link in Step 2.
8. In the Download window, leave Open File After Download selected. Download the file.

The client loads and installs automatically in your Pocket PC.

Downloading and Installing the Desktop Outlook Synchronization Client

Download the client to be able to synchronize appointments, tasks, and contacts between Microsoft Outlook on your desktop and Oracle Sales.

To initialize custom category:

If you have your own custom category added to the Master Category List, then proceed with the installation steps. If you don't have your own custom category added to the Master Category List, then you need to create one and remove it using the following steps.

1. In Outlook select Edit > Categories from the menu .
2. Click **Master Category List**.

3. Add a new Category called Outlook Category.
4. Click **OK**.
5. Click **Master Category List**.
6. Select Outlook Category from the list.
7. Click **Delete**.
8. Click **OK**.

Installation Steps:

1. Login to Oracle Applications and select your Sales User responsibility.
2. On the Dashboard, go to Preferences > Outlook Synchronization > Client Download.
3. Follow the instructions on the page.

Your Outlook toolbar includes "Oracle Sales Synchronization" which launches the synchronization program.

If you see a security permission message while synchronizing, answer Yes to continue the synchronization.

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