Oracle Mobile Sales Assistant Guide

Version 8.0

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ORACLE®

Contents

Chapter 5:   Using Oracle Mobile Sales Assistant with iPhone

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1 What's New in This Release

What's New in Oracle Mobile Sales Assistant Guide, Version 8.0

Oracle Mobile Sales Assistant 8.0 is the first release of this new product. Table 1 lists the chapters for this guide.

Table 1.   New Product Features in Oracle Mobile Sales Assistant Guide, Version 8.0

Topic	Description
Chapter 2, "About Oracle Mobile Sales Assistant"	This chapter describes the Oracle Mobile Sales Assistant application.
Chapter 3, "Installing and Configuring Oracle Mobile Sales Assistant"	This chapter describes how to install and configure Oracle Mobile Sales Assistant on your BlackBerry or iPhone device.
Chapter 4, "Using Oracle Mobile Sales Assistant with BlackBerry"	This chapter describes how to use the features of Oracle Mobile Sales Assistant for BlackBerry.
Chapter 5, "Using Oracle Mobile Sales Assistant with iPhone"	This chapter describes how to use the features of Oracle Mobile Sales Assistant for iPhone.

2 About Oracle Mobile Sales Assistant

Optimized for sales professionals, Oracle Mobile Sales Assistant is designed to help you collaborate with your colleagues and customers, complete your frequent tasks, and quickly close business deals while on the road. Oracle Mobile Sales Assistant contains innovative features that provide you with access to both Personal Information Manager (PIM) and Customer Relationship Management (CRM) information, and enables you to work more effectively and collaboratively.

Oracle Mobile Sales Assistant allows you to spend more time away from the office and be closer to your customers. It overcomes the key challenges while you are working remotely, including:

■ Limited access to contact and account data

■ Insufficient time to complete manual tasks

Oracle Mobile Sales Assistant is ideal for sales representatives whose access is limited to their BlackBerry or Apple iPhone device while traveling to a meeting or in the field with a customer.

Oracle Mobile Sales Assistant is designed to maximize the following:

■ **Usability.** Oracle Mobile Sales Assistant is designed for sales users and is optimized to support frequent tasks in the sales cycle.

■ **Mobile Technology.** As a smart client, Oracle Mobile Sales Assistant uses Web services to communicate with the Siebel Industry Application Server and contains a small cache to maintain data persistence, minimizing interruptions or lost work.

■ **Productivity.** Oracle Mobile Sales Assistant maximizes productivity by enabling you to easily find the relevant information at a glance, and quickly complete important activities with fewer clicks.

■ **Collaboration.** Oracle Mobile Sales Assistant allows you to pass contact information to other contacts, employees, or account team members. Additionally, you can schedule meetings and calls with contacts, employees, account team members, and even account customers, while you are mobile.

3 Installing and Configuring Oracle Mobile Sales Assistant

This chapter describes how to install and configure Oracle Mobile Sales Assistant on your BlackBerry or iPhone device. It includes the following topics:

- "Requirements for Using Oracle Mobile Sales Assistant" on page 9
- "Process of Installing and Configuring Oracle Mobile Sales Assistant" on page 9
- "Installing Oracle Mobile Sales Assistant on a Supported Device" on page 13

Requirements for Using Oracle Mobile Sales Assistant

The following are the minimum requirements to use Oracle Mobile Sales Assistant:

- A supported BlackBerry device with the Tasks application installed, or a supported iPhone device
- An active data plan for the device

  NOTE: Oracle is not responsible for any data, telephone, or text-messaging charges associated with the active data plan for the device.

- An installed Siebel Industry Application Server. For more information about installing Siebel Server components, see the *Siebel Installation Guide* for the operating system you are using.
- An installed Oracle SOA Suite server.

Process of Installing and Configuring Oracle Mobile Sales Assistant

To install and configure Oracle Mobile Sales Assistant, perform the following tasks:

1. "Mapping Host Names" on page 10
2. "Creating Server Connections" on page 10
3. "Importing and Deploying BPEL Projects" on page 11
4. "Deploying MSA Proxy on Oracle SOA Suite" on page 12

NOTE: If you are installing Oracle Mobile Sales Assistant as part of a patch release, consult the patch documentation for prerequisites, additional installation and configuration tasks, and supported systems that are specific to this release.

Mapping Host Names

In BPEL projects, a virtual host name (siebel-op-server) points to the Siebel Server. You must map the siebel-op-server to the Siebel Server address.

This task is a step in "Process of Installing and Configuring Oracle Mobile Sales Assistant" on page 9.

Use the following procedure to map host names.

To map host names

■ Open the following files and change siebel-op-server to <Siebel Host Address>:<port>, for example, siebel.mycompany.com:8088:

- bpel\Account\bpel\SWICustomerPartyIOV0.wsdl

- bpel\Account\bpel\SWIAddressIO.wsdl

- bpel\Account\bpel\SWIAccountNoteIO.wsdl

- bpel\Account\bpel\SWIAccountIO.wsdl

- bpel\Activity\bpel\SWICustomerPartyIOV0.wsdl

- bpel\Activity\bpel\SWIActivityIO.wsdl

- bpel\Activity\bpel\SWIActionIO.wsdl

- bpel\Contact\bpel\SWIContactIOV0.wsdl

- bpel\Contact\bpel\SWIContactNoteIO.wsdl

- bpel\Contact\bpel\SWICustomerPartyIOV0.wsdl

- bpel\Note\bpel\SWINoteIO.wsdl

- bpel\Opportunity\bpel\SWIEmployeeIO.wsdl

- bpel\Opportunity\bpel\SWIOpportunityV0.wsdl

- bpel\Opportunity\bpel\SWIOpptyIO.wsdl

- bpel\PickList\bpel\SWIPickListHierarchicalIO.wsdl

- bpel\User\bpel\SWIEmployeeIO.wsdl

- java/MSAProxy/public_html/WEB-INF/classes/config.properties

Creating Server Connections

This task is a step in "Process of Installing and Configuring Oracle Mobile Sales Assistant" on page 9.

Use the following procedure to create an application server connection.

To create an application server connection

1   In Oracle JDeveloper, right-click the Applications Server node in the Connections Navigator tab, then choose New Application Server Connection.

2   In the Create Application Server Connection window, accept the default value for the Connection Name, and choose Oracle Application Server 10g 10.1.3 as the Connection Type. Click Next.

3   Specify a username and password, and click Next.

4   Specify the Oracle SOA Suite host address for Host name and a value for the OC4J Instance Name, and click Next. Click Finish.

Use the following procedure to create an integration server connection.

To create an integration server connection

1   In Oracle JDeveloper, right-click the Integration Server node in the Connections Navigator, then choose New Integration Server Connection.

2   In the Create Application Server Connection Welcome page, click Next.

3   Enter ServerConnection1 in the Connection Name field, and click Next.

4   Choose AppServerConnection1 for the Application Server, enter the host name in the Host Name field, and a port number in the Port Number field. Click Finish.

    NOTE: It is recommended that you test the server connection.

Importing and Deploying BPEL Projects

Business Process Execution Language (BPEL) processes translate Web service communication between Siebel Business Applications and Oracle Mobile Sales Assistant.

Use the Oracle SOA Suite server to install the following BPEL instances:

■   Account

■   Activity

■   Contact

■   DeletedItem

■   Note

■   Opportunity

■   Picklist

■   User

■   Lead

To import BPEL projects, you must create an application in Oracle JDeveloper. For more information on creating an application in Oracle JDeveloper, see the *Oracle BPEL Process Manager Developer's Guide*.

This task is a step in "Process of Installing and Configuring Oracle Mobile Sales Assistant" on page 9.

Use the following procedure to import BPEL projects.

To import BPEL projects

1 In Oracle JDeveloper, create an empty workspace:

    a In the Applications Navigator, right-click the Applications node, then choose New Application.

    b In the Create Application window, enter an application name and a directory name, then click OK.

       The Create Project window appears.

    c Click Cancel.

2 Locate all BPEL projects related to Oracle Mobile Sales Assistant and copy them to the Application directory.

3 In Oracle JDeveloper, open the .jpr files for each BPEL project.

4 If prompted to migrate the project to the Oracle JDeveloper version 10.1.3.4.0 file format, click Yes.

Use the following procedure to deploy BPEL projects.

To deploy the BPEL projects

■ Right-click each project in Oracle JDeveloper, and select Deploy, ServerConnection1, and then Deploy to the default domain.

Deploying MSA Proxy on Oracle SOA Suite

MSA Proxy is a standard J2EE Web application that works with any J2EE standard Web application container. It handles URL conversion, session management, fault handling and messaging between the Oracle Mobile Sales Assistant client and the BPEL container.

This task is a step in "Process of Installing and Configuring Oracle Mobile Sales Assistant" on page 9.

Use the following procedure to deploy MSA Proxy.

To deploy MSA Proxy

1 Open the configuration file located at:

    `java/MSAProxy/public_html/WEB-INF/classes/config.properties`

2 Change the following settings to match your environment:

    ■ SiebelServer=<URL location of Siebel Industry Application Server>

       For example:

       `SiebelServer=http://siebel-op-server:port`

■ BpelServer=<URL location of BPEL Server>

For example:

`BpelServer=http://localhost:port`

3 Configure the following parameters to match the following values:

■ ContentType=text/xml; charset\=UTF-8

■ DefaultErrorCode=SBL-EAI-04376

■ LoggingMsaIo=true

■ LoggingSiebelIo=true

■ LoggingBpelIo=true

■ LoggingHttpHeader=true

■ LoggingHttpBody=true

4 In Oracle JDeveloper, select the application that you created in "Importing and Deploying BPEL Projects" on page 11. From the File menu, choose Open.

5 In the Open window, choose MSAProxy.jpr, then click Open.

6 In the Applications Navigator, expand the MSAProxy tree.

7 In the MSAProxy tree, right-click webapp.deploy, choose Deploy to, and the name of the application server.

Installing Oracle Mobile Sales Assistant on a Supported Device

To install Oracle Mobile Sales Assistant on BlackBerry, open the Web browser on your BlackBerry device and navigate to

http://mobile.sales.com/

Click the link on the download page and follow the instructions that appear on the device to complete the installation.

On a Blackberry device, Oracle Mobile Sales Assistant supports only the BlackBerry browser. Do not use third-party Web browsers for the installation of Oracle Mobile Sales Assistant.

To install Oracle Mobile Sales Assistant on iPhone, download and install the Oracle Mobile Sales Assistant client from the Apple App Store. In the iTunes application, navigate to the App Store, search for Oracle Mobile Sales Assistant, and then download it as you would any other purchased application.

CAUTION: Do not install Oracle Mobile Sales Assistant on unsupported devices. Back up your device data before you install Oracle Mobile Sales Assistant.

Oracle Mobile Sales Assistant automatically checks for updates. You are prompted to upgrade if a newer version is available. To force a manual check for a newer version, choose Check for newer version from the menu on the Oracle Mobile Sales Assistant home screen and follow the prompts.

4 Using Oracle Mobile Sales Assistant with BlackBerry

This chapter describes how to use the features of Oracle Mobile Sales Assistant. It includes the following topics:

Signing On to Oracle Mobile Sales Assistant for BlackBerry

Oracle Mobile Sales Assistant is an application on your BlackBerry device that exchanges data with the Siebel industry application. To access the data stored in the Siebel industry application you must have an account on the Siebel industry application and must sign on using your user ID and password. When you start Oracle Mobile Sales Assistant you are prompted for this authentication information.

The connection from the BlackBerry device to the Siebel industry application can be by Mobile Data Service (MDS), BlackBerry Internet Service, or direct. You can specify one of those methods or choose Automatic, which tries each method in the order listed previously. If you are unsure what type of connection is available on your BlackBerry device, select Automatic, or seek assistance from your BlackBerry administrator.

To sign on to Oracle Mobile Sales Assistant

1 From the Home screen of your BlackBerry device, choose the Oracle Mobile Sales Assistant icon
from the menu.

To display the full list of applications, click the Menu button. The Oracle Mobile Sales Assistant
icon may be in the Downloads folder.

2 Enter your Siebel industry application user name and password in the following format:
UserID@@servername, for example, TCOOK@@http://msa.myorg.8866.org.

3 In the Connect menu, choose a connection method: Automatic, Mobile Data Service (MDS),
BlackBerry Internet Service, or Direct.

4 (Optional) You can select Remember My Password so that in future the Sign-On screen does not
appear, and you are automatically signed on to the Siebel industry application.

Oracle Mobile Sales Assistant configures the sign on as a one-time set up.

To display the Sign-On screen again, return to the Oracle Mobile Sales Assistant Home screen,
press Menu, and click Settings.

To remove a previously stored password or cached data, open the Sign-On screen, press Menu,
and then click Reset.

NOTE: Oracle Mobile Sales Assistant does not support single sign-on (SSO) to the Siebel industry
application.

Scenario for Using Oracle Mobile Sales Assistant for BlackBerry

Oracle Mobile Sales Assistant can assist you with many of your work tasks. A major design feature
of Oracle Mobile Sales Assistant is its ability to drill down on related information and its integration
with native BlackBerry capabilities. For example, if you are displaying a customer's information (such
as name, address, phone number, and so on) you can call the customer by selecting the phone
number, send an email by selecting the email address, or get a map by selecting the address.

The user interface of Oracle Mobile Sales Assistant has been designed around the tasks you perform
on a daily basis. In this scenario, you are out of town on a sales trip. After breakfast you use Oracle
Mobile Sales Assistant and start with the Today screen. After reviewing the list of today's
appointments and tasks, you read a note from your regional supervisor asking you to get purchase
estimates from your larger customers.

Returning to the list of today's appointments, you select the first event on the list to display its details
(purpose of the appointment, contacts, and so on). This appointment is a phone call with a client in
another city to take place in 5 minutes. You select the contact's name to display her details. To make
sure you are prepared for the call, you scroll down to the contact's detail listing, click the Activities
icon, and browse the activities you have listed for this contact. Next, you return to the Contact
screen, click the Notes icon, and read through your notes on this contact, such as the members of
her project team and the name of her supervisor. You are ready for the call. You return to the Contact
screen, select her phone number, and call her.

When the call is over, Oracle Mobile Sales Assistant prompts you to add new tasks or activities as a follow up to the call.

Return to the Today screen to display your next appointment. You click the appointment item and display its details. The appointment is with a customer in this city. You click the contact's name to display his details. As before, you review your notes and activities associated with this contact. You click his phone number to call him and verify the appointment. After verifying the appointment, you return to the Contact screen, click his work address, and then get the map showing his location. You can then get directions from your current location to his office.

This scenario illustrates some of the links between functions in Oracle Mobile Sales Assistant.

Navigation Features in Oracle Mobile Sales Assistant

Oracle Mobile Sales Assistant works with a variety of BlackBerry devices. The navigation methods vary by device. These navigation methods can be categorized. The categories are based on how the device moves the pointer on the BlackBerry screen:

■ Trackwheel (8700 series)

■ Trackball (8800 series, Bold, Curve, Pearl)

■ Touch screen (Storm)

Table 2 lists the common navigation actions and how to accomplish them using your BlackBerry device.

Table 2. Navigation Methods for BlackBerry Devices

Action	Trackwheel	Trackball	Touch
Move the pointer	For vertical motion, move the trackwheel up or down. For horizontal motion, hold down Alt, and move the trackwheel up or down.	Press the trackball.	Drag your finger on the touch screen.
Check or clear a selected check box	Press the trackwheel, or press Enter.	Press the trackball.	Click the check box.
Press a selected button	Press the trackwheel.	Press the trackball.	Click the button.
Move back one screen	Press Escape.	Press Escape.	Press Escape.
Display a menu	Press the trackwheel.	Press Menu.	Press Menu.
Scroll display	Press the trackwheel.	Press the trackball.	Slide your finger up or down the screen.

There are two ways to navigate to a function in Oracle Mobile Sales Assistant: drill down on a field, or use the Shortcut bar. Drilling down on a field refers to activating a link from one function to another. For example, while viewing an appointment you can click a contact's name and display that contact's full information. The Shortcut bar is at the bottom of the Today screen. It contains links to each of the major functions within Oracle Mobile Sales Assistant. For more information on the Shortcut bar, see "Accessing Today's Items" on page 18.

Accessing Today's Items

To display the Today screen, press Escape until the Today screen appears. If you have not yet started Oracle Mobile Sales Assistant, see "Signing On to Oracle Mobile Sales Assistant for BlackBerry" on page 15. The Today screen displays appointments and tasks scheduled for today and their associated contacts. Specifically, the Today list displays the following:

■ **Today's Appointments.** Shows appointments that are scheduled for today.

■ **Today's Tasks.** Shows incomplete tasks that are due or overdue today.

■ **Today's Contacts.** Shows all contacts and users included as participants in today's appointments and tasks.

■ **Recent Lookups.** Shows the five most recently viewed records (accounts, contacts, opportunities, or users). This category provides a fast way to return to a record that you were working on previously.

The Today screen includes the Shortcut bar. Table 3 lists the icons in the order in which they appear (left to right) in the Shortcut bar.

Table 3.   Shortcut Bar Icons

Icon	Function	Description
	Contacts	Contacts are individuals with whom your company currently conducts business or expects to conduct business with in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. A contact is generally associated with an account, and often, an account record includes links to information about several different contacts at that company. You can display contacts stored in your BlackBerry device, or from the Siebel industry application, or both. For more information, see "Accessing Contacts" on page 19.
	Appointments	Displays your appointments or events. For more information, see "Using Appointments and Calendar" on page 21.
	Tasks	Displays a list of tasks sorted in chronological order by the due date. For more information, see "Tracking Tasks" on page 23.

Table 3.   Shortcut Bar Icons

Icon	Function	Description
	Accounts	Accounts are generally companies that you do business with, but you can also track partners, competitors, affiliates, and so on as accounts. For more information, see "Accessing Accounts" on page 24.
	Opportunities	Opportunities are sales deals that, at some point, might be included in revenue forecasting. For more information, see "Accessing Opportunities" on page 25.
	Users	Users are coworkers and partners who are assisting you with your accounts and opportunities. For more information, see "Accessing Users" on page 25.
	Notes	Displays notes. Notes are your notes that are associated with contacts or accounts.

Accessing Contacts

To display the Contacts list, drill down on contact information displayed on your screen, or return to the Today screen, and click the Contacts icon from the Shortcut bar.

To find a contact you can use any of the following methods:

■ Scroll through the list.

■ Use the Search field at the top to display matching contacts. For more information, see "Searching for Contacts" on page 20.

To display the details of a contact, click the contact's entry.

You can do the following actions:

■ To call a phone number, click it.

■ To display an address on a map, click it.

■ To send an email, click it.

■ To make changes to a displayed contact, press Menu, and choose Edit.

■ To add a contact from the Contact list, press Menu, and choose New.

When adding or editing a contact, you complete the fields in Table 4.

Table 4.   Contacts Fields

Field	Method of Entering Data	Description
First Name and Last Name	Keyboard	The contact's first and last names.
Account	Account List	Select an existing account from the list.
Job Title	Keyboard	The contact's job title.
Email Addresses	Keyboard	Enter email address.
Phone Numbers	Keyboard	Enter work or mobile phone number.
Addresses	Keyboard	Edit address. You can edit the contact address when displaying the contact record. If the field is blank, you can add a new address.

In addition, the Contact Detail screen has links and buttons, which you can use to display more information:

■ **Notes.** Links to a list of notes associated with the contact. You can drill down on each note to get more information.

■ **Log a Call.** Click this button to log a call with this contact.

■ **Addresses**. Searches the Siebel industry application for additional addresses for this contact.

■ **Activities.** Links to a list of activities associated with the contact. You can drill down on each activity to get more information.

■ **Share.** Click this button to send this contact's information with others. You can send the information by email or SMS (text message).

Searching for Contacts

When you open the Contacts screen, Oracle Mobile Sales Assistant displays a combined list of up to 100 contacts from the Siebel industry application and contacts from the Contacts application on the BlackBerry device. The icon to the left of the name indicates if the contact name is Remote (a contact from the Siebel industry application) or Local (a contact from the Contacts application on the BlackBerry device).

As you type in the Search field, Oracle Mobile Sales Assistant filters the display to show matching entries. For example, typing *Jo* shows all contacts whose name begins with *Jo*, such as *Joanne, Joe, John,* and *Jordan.*

If the contact you are searching for is not one of the 100 remote contacts on your mobile device, you can connect to the Siebel industry application and search it. To search the Siebel industry application, make sure the cursor is in the Search field and then press Enter. Oracle Mobile Sales Assistant searches the Siebel industry application and returns any matching contacts whom you do not have already on your mobile device. If you do not have Internet access, Oracle Mobile Sales Assistant cannot successfully contact the Siebel industry application and cannot retrieve any additional contacts.

Using Appointments and Calendar

To display your appointments and calendar, return to the Today screen, and click the Appointments icon from the Shortcut bar.

The Calendar screen has two views: List view and Day view. The List view shows your appointments as a continuous list sorted in chronological order and is not limited to just one day's appointments. The Day view resembles a traditional day planner and shows appointments only for the selected day. You can change the selected day by using the left and right arrows on either side of the displayed date.

To view the details of an appointment, select the appointment in either the List or Day view. The details of an appointment include:

■ Appointment name

■ Location

■ Date

■ Start time

■ End time

■ List of participants

If appointment records are deleted from the Siebel industry application outside of Oracle Mobile Sales Assistant, the deleted records continue to be shown until the next time that the data is synchronized.

While viewing an appointment, you can click a participant's name to get more details about the participant, such as phone numbers, address, email address, notes, and so on. For more information on displaying a contact's information, see "Accessing Contacts" on page 19. You can do the following:

■ To make changes to the appointment information, press Menu, then choose Edit.

■ To add an appointment, press Menu, then choose New.

■ To save your changes or new record, press Menu, then choose Save.

When adding or editing an appointment, complete the fields shown in Table 5.

Table 5.   Appointment Fields

Field	Method of Entering Data	Description
Subject	Keyboard	This field shows the appointment name that appears in the List and Day views
Type	Menu	The menu choices are synchronized with the Siebel industry application.
Location	Keyboard	This field appears in the List and Day view under the Appointment Name
Date	Date/Time Picker	The start date must be before the end date. For more information, see "About Appointment Dates" on page 22.
Start Time	Menu	The Start time must be before the End time.
End Time	Menu	The End time must be after the Start time.
Participants	Contact List	Each appointment automatically includes you as a participant. For information on adding or deleting participants, see "Working with Participants" on page 22.
Description	Keyboard	A description of the opportunity and anything else of interest.

NOTE: Oracle Mobile Sales Assistant sends modified appointments to the Siebel industry application when a network connection is available.

To delete an appointment, open the appointment, and press Menu, and then choose Delete.

Working with Participants

To add more participants, click the Participants button, press Menu, click Add Participant, and choose from Account Team, Contacts, Account Contact, or Users. From the list of contacts, select a record.

To delete a participant, edit the appointment record, select Participants, highlight a participant from the list, and choose Delete Participant from the menu.

About Appointment Dates

When Oracle Mobile Sales Assistant synchronizes appointments with the Siebel industry application it filters the appointments that appear on the mobile device. The result is that the mobile device shows appointments ranging from 14 days before the current date to 28 days after the current date. the Siebel industry application keeps a record of all appointments, regardless of their dates.

If you create an appointment on your mobile device that is outside the date filtering range, it remains on your device until you synchronize with the Siebel industry application. When you synchronize data, the date filter is applied, and the appointment is temporarily removed from your mobile device. In future synchronizations, if the appointment is within the date filtering range, it reappears on your mobile device.

Tracking Tasks

To display the Tasks list, drill down on Tasks information displayed on your screen, or return to the Today screen, and click the Tasks icon from the Shortcut bar.

The Task list displays your tasks in chronological order. The order is based on the due date. To view the details of a task, click it.

While viewing a task you can click the contact or account name to get more details, such as the phone numbers, address, email address, notes, and so on. For more information on displaying a contact's information, see "Accessing Contacts" on page 19. You can do the following:

■ To make changes to the task information, press Menu, then choose Edit.

■ To add a task, press Menu, then choose New.

■ To save your changes or new record, press Menu, then choose Save.

When adding or editing a task, complete the fields in Table 6.

Table 6. Task Fields

Field	Method of Entering Data	Description
Subject	Keyboard	The name of the task.
Type	Menu	The type of task.
Due	Date Editor	The date when the task is due. For more information, see "About Task Event Dates" on page 24.
Completed Flag	Check Button	Displayed on the Date Editor. Click either the Complete or Incomplete button.
Assigned To	User List	Tasks are assigned to the person who creates them or you can assign them to another user.
Primary Contact	Contact List	Click the Primary Contact field to display your list of contacts. Choose one contact.
Account	Account List	Click the Account field to display your list of accounts. Choose one account.
Opportunity	Opportunity List	Click the Opportunity field to display your list of opportunities. Choose one opportunity.
Description	Keyboard	Optional text for your own notes.

About Task Event Dates

When Oracle Mobile Sales Assistant synchronizes tasks with the Siebel industry application it filters the tasks that appear on the mobile device. The mobile device does not store tasks older than 28 days from the current date. There is no filtering on future task dates. The Siebel industry application keeps a record of all tasks, regardless of their dates.

Accessing Accounts

To display the Accounts list, drill down on contact information displayed on your screen, or return to the Today screen, and click the Accounts icon from the Shortcut bar.

You cannot add or edit an account in Oracle Mobile Sales Assistant.

To find an account you can use any of the following methods:

■ Scroll through the list.

■ Use the Search field at the top to filter matching accounts.

■ Search the Siebel industry application.

To search the Siebel industry application, you must have Internet access. Start by clicking the Search field. As you type, the locally cached data is filtered and displayed. If none of the locally cached records meets your criteria, press Enter. Oracle Mobile Sales Assistant queries the Siebel industry application for matching entries that you have permission to view.

To display the details of an account, select the account's entry. The details include:

■ Account name

■ Location

■ Phone numbers

■ Addresses

These details are available from the Menu. To call a phone number, click it, and press Menu. To display an address on a map, click it and press Menu. To send an email, click it and press Menu.

In addition, the Account Detail screen has links that you can use to display more information:

■ **Notes.** Displays notes related to this account. You can drill down on each note to get more information.

■ **Log a Call.** Click this button to log a call with this account.

■ **Addresses**. Searches the Siebel industry application for additional addresses for this account.

■ **Activities.** Displays activities that are related to this account. You can drill down on each activity to get more information.

■ **Contacts.** Displays a list of contacts associated with the account. You can drill down on each contact to get more information.

■ **Account Team.** Displays a list of users who are on the account team. You can drill down on each user to get more information.

■ **Share.** Click this button to send this account's information with others. You can send the information by email (in vcard format) or SMS (text message).

Accessing Opportunities

To display the Opportunities list, drill down on opportunity information displayed on your screen, or return to the Today screen, and click the Opportunities icon from the Shortcut bar.

The Opportunities list displays more than just opportunity names. It also displays the projected revenue and probability. You can sort the list using any of those three pieces of information. To switch the sort method, press Menu, and choose Change Sort Order.

To find an opportunity you can search for the name of the opportunity (using the Search field on the left), or for the account name (using the Search field on the right).

To display the details of an opportunity, click its entry.

You can edit and delete opportunities, but you cannot add them. To make changes to an opportunity, display the opportunity's details, press Menu, and then choose Edit.

When editing a contact, complete the fields in Table 7.

Table 7.　　Opportunity Fields

Field	Method of Entering Data	Description
Name	Keyboard	The opportunity's name.
Revenue	Number Keyboard	The projected revenue for the opportunity.
Account	Account List	Select an existing account from the list.
Close Date	Date Editor	The date you expect to close the deal.
Sales Stage	Read-Only	Indicates the Sales Stage for the opportunity. This information is read-only and cannot be edited.
Probability	Number Keyboard	The probability that the deal closes as expected.
Forecast	Yes/No	Indicates if the account should be included in the forecast.
Next Step	Keyboard	A note for your reference about the next step in the process.
Description	Keyboard	A description of the opportunity and anything else of interest.

Accessing Users

To display the Users list, drill down on user information displayed on your screen, or return to the Today screen, and click the User icon from the Shortcut bar.

Users are similar to contacts, except that the user list is restricted to other users of the Siebel industry application. For more information on contacts and how to access contact information, see "Accessing Contacts" on page 19.

Completing After-Call or Email Activities

When you use Oracle Mobile Sales Assistant to call a contact or user, you can return to Oracle Mobile Sales Assistant by pressing the Escape key. Oracle Mobile Sales Assistant then displays the After Call screen that provides links to the activities that are appropriate after a call. Table 8 lists these activities.

Table 8.   After-Call Activities

Activity	Links to	More Information	Description
Log Call	Task Edit screen	"Tracking Tasks" on page 23	Oracle Mobile Sales Assistant creates a new task and fills some of the fields for you automatically, such as the Due date, Assigned to, Primary Contact, Account, and Opportunity. The difference between Log Call and Add Task activity is that the Completed check box is selected when you use Log Call.
Add Task	Task Edit screen	"Tracking Tasks" on page 23	
Add Appointment	Appointment Edit screen	"Using Appointments and Calendar" on page 21	Oracle Mobile Sales Assistant creates a new appointment and fills some of the fields automatically, such as Date and Participants fields.
Add Contact	Contact Edit screen	"Accessing Contacts" on page 19	Oracle Mobile Sales Assistant creates a new contact and fills some of the fields automatically, such as Account.

When you use Oracle Mobile Sales Assistant to email a contact or user, you can return to Oracle Mobile Sales Assistant by pressing the Escape key. Oracle Mobile Sales Assistant then prompts you to log the email. If you accept the prompt Oracle Mobile Sales Assistant creates a new task with the email details and fills some of the fields for you automatically, such as the Due date, Assigned to, Primary Contact, Account, and Opportunity.

About Data Retrieval

Oracle Mobile Sales Assistant works with data from different data sources. It can retrieve data from:

■ The Siebel industry application

■ Appointments application on the BlackBerry device

■ Contacts application on the BlackBerry device

■ Tasks application on the BlackBerry device

This topic describes how Oracle Mobile Sales Assistant handles the following data from the sources.

Account Lookup

When you open the Accounts screen, Oracle Mobile Sales Assistant displays a list of up to 100 accounts from the Siebel industry application:

■ As you type in the Search field, the account list is filtered. The filter is based on the search term that you enter. Only accounts with a name matching the search term are displayed. This list shows only accounts stored in the local data cache.

■ You can click the Search button on the keyboard to search for any matching accounts in the Siebel industry application.

Call Notes

When you create call notes, Oracle Mobile Sales Assistant stores the data only on the Siebel industry application.

Contact Data Edit

When you edit and save a contact record that is stored in both your BlackBerry device and the Siebel industry application, Oracle Mobile Sales Assistant automatically saves the data in both sources.

Contacts Lookup

When you open the Contacts screen, Oracle Mobile Sales Assistant displays a combined list of up to 100 contacts from the Siebel industry application and contacts from the Contacts application on the BlackBerry device:

■ To display only contacts from the Siebel industry application, click the CRM button.

■ To display only contacts from the Contacts application on the BlackBerry device, click the Local button.

■ As you type in the Search field, the contact list is filtered. The filter is based on the search term that you enter. Only contacts with a first name or last name matching the search term are displayed. This list shows only contacts stored in the local data cache and the Contacts application on the BlackBerry device.

■ You can press Enter on the keyboard to search for any matching contacts in the Siebel industry application.

Custom Fields

Custom fields are not supported by Oracle Mobile Sales Assistant. You cannot change the fields that are displayed by Oracle Mobile Sales Assistant. If you rename a field in the Siebel industry application, Oracle Mobile Sales Assistant does not show the custom field name.

Opportunity Data

Oracle Mobile Sales Assistant does not support adding opportunities. It allows editing of opportunity data, but not the opportunity sales stage.

Tasks or Appointment Data

When you create a task or appointment, Oracle Mobile Sales Assistant automatically saves the data to your BlackBerry device, and prompts you to save the data to the Siebel industry application.

When you view a task or appointment:

■ Oracle Mobile Sales Assistant uses the Due Date, Subject and Description when checking if two tasks are the same.

■ Oracle Mobile Sales Assistant uses Start Time, End Time, Location and Subject when checking if two appointments are the same.

User Data

Oracle Mobile Sales Assistant does not support adding to or editing user data.

User Lookup

When you use Oracle Mobile Sales Assistant to search for a user, it searches only data in the Siebel industry application.

About Data Caching

Oracle Mobile Sales Assistant maintains a cache of data downloaded from the Siebel industry application. This cache is limited to accounts, appointments, contacts, opportunities, tasks, and users retrieved from the Siebel industry application. The purpose of the cache is to let you work with the existing data when a network connection is not available. All cached information is deleted when you remove the Oracle Mobile Sales Assistant application from the mobile device.

5 Using Oracle Mobile Sales Assistant with iPhone

This chapter describes how to use the features of Oracle Mobile Sales Assistant for iPhone. It includes the following topics:

Signing On to Oracle Mobile Sales Assistant for iPhone

To sign on to Oracle Mobile Sales Assistant on the iPhone, tap the Sales icon. Oracle Mobile Sales Assistant loads and then displays its sign-on screen. Enter your Siebel industry application user name and password in the following format: UserID@@servername, for example, TCOOK@@http://msa.myorg.8866.org.

After entering your user name and password, tap Login.

The first time you sign on to Oracle Mobile Sales Assistant (or if you change user names), the initial data download process begins automatically. This process downloads an initial set of accounts, appointments, contacts, opportunities, tasks, and users. The initial data download process must be completed before using the other features in Oracle Mobile Sales Assistant.

For convenience, you can store your user name and password by navigating to the Settings screen, and then the Sales screen. When your credentials are stored in the Settings screen, you can access Oracle Mobile Sales Assistant quickly by tapping the Sales icon, without having to enter your user name or password.

After you have signed on, Oracle Mobile Sales Assistant connects to the Siebel Industry Application Server and downloads the latest information. It displays the Today screen (for more information on the Today screen, see "Using the Today List" on page 30). Oracle Mobile Sales Assistant retrieves current information from the Siebel Industry Application Server and displays information, such as your appointments, today's contacts, tasks, and messages.

Navigating Oracle Mobile Sales Assistant for iPhone

If you are familiar with navigating other iPhone applications you will find Oracle Mobile Sales Assistant is similar. The following interface elements are present in Oracle Mobile Sales Assistant's implementation:

■ A navigation bar is at the top of most screens. This bar displays the current screen's name and when appropriate has buttons either for saving a record or navigating to another screen or record.

■ A tab bar is present at the bottom of most screens. This bar contains quick-access buttons to your favorite screens in Oracle Mobile Sales Assistant. You can configure the contents of the Tab bar.

■ Drilling down on a record in a list displays the detail screen for that record. For example, in a list of contacts you can tap a specific contact record and Oracle Mobile Sales Assistant displays the information for the selected contact.

■ Tapping a phone number activates the phone and calls the selected number.

■ Tapping an address activates Apple's Maps application to display the address. You can use the Maps application to locate your current position and get directions to the selected address.

Using the Today List

To display the Today list, tap its tab in the Tab bar at the bottom of the screen. If the Today list is not in the Tab bar, tap the More tab and then tap Today.

The Today list displays appointments and tasks scheduled for today and their associated contacts. Specifically the Today list displays:

■ **Appointments**. Shows appointments that are scheduled for today.

■ **Contacts**. Shows all contacts included as participants in today's appointments and tasks.

■ **Tasks**. Shows incomplete tasks that are due or overdue today.

■ **Recent Lookups**. Shows the five most recently viewed records (accounts, contacts, opportunities, or users). This category provides a fast way to return to a record that you were working on previously.

Each category in the Today list might have a number in its title to indicate the quantity of records available.

You can customize the contents of the Today list and the order in which the items appear. To change the Today list, tap the Edit button in the Navigation bar at the top. Oracle Mobile Sales Assistant displays the available categories.

To remove a category from the Today list, drag its switch to the Off position. To re-enable it, drag its switch to the On position.

To change the order of the categories, drag them up or down within the list by using the drag icon (three gray parallel lines) to the right of each category.

When you are finished, tap the Done button in the Navigation bar. Oracle Mobile Sales Assistant displays the Today list with your changes.

Using Appointments and Calendar

To display your appointments and calendar, tap the Calendar tab in the Tab bar at the bottom of the screen. If the calendar is not in the Tab bar, tap the More tab, and then tap Calendar.

NOTE: Oracle Mobile Sales Forecast calendar is separate from the iPhone calendar. The two calendars do not share information or have any data connectivity between them. Both perform similar functions in similar ways to be consistent.

The Calendar screen has two views: List view and Day view. The List view shows your appointments as a continuous list sorted in chronological order, and is not limited to just one day's appointments. The Day view resembles a traditional day planner and shows appointments only for the selected day. You can change the selected day by tapping the left and right arrows on either side of the displayed date.

To view the details of an appointment, tap the appointment in either the List or Day view. The details of an appointment include:

■ Appointment name

■ Location

■ Date

■ Start time

■ End time

■ List of participants

■ Description

If appointment records are deleted from the Siebel Industry Application Server outside of Oracle Mobile Sales Assistant, the deleted records continue to be shown until the next data refresh.

While viewing an appointment you can tap a participant's name to get more details about the participant, such as phone numbers, address, email address, notes, and so on. For more information on displaying a contact's information, see Accessing Contacts.

To make changes to the appointment information, tap Edit.

To add an appointment, tap the plus button or in Day view, tap any open area.

When adding or editing an appointment, you complete the following fields:

Table 9.   Appointment Fields

Field	Method of Entering Data	Description
Subject	Text Keyboard	This is the appointment name that appears in the List and Day views.
Location	Text Keyboard	Appears in the List and Day view under the Appointment Name.
Start Date	Date/Time Picker	The start date must be before the end date.
End Date	Date/Time Picker	The end date must be after the start date.
Description	Text Keyboard	Optional text for your own notes.
Participants	Account Team List, Contact List, Users	Each appointment automatically includes yourself as a participant. For information on adding or deleting participants, see Working with Participants.

When you are finished adding or editing an appointment, tap Save.

NOTE: Oracle Mobile Sales Assistant sends modified appointments to the Siebel Industry Application Server when a network connection is available. It displays newly created appointments immediately, but you cannot edit these appointments until they are sent to the Siebel Industry Application Server.

To delete an appointment, edit the appointment, and tap Delete.

Working with Participants

To add more participants, tap the Participants button, choose from Account Team, Contacts, Customer Contact List, or Users. From the list of contacts, select a record.

To delete a participant, edit the appointment record, tap Participants, tap the minus button, and then tap Delete.

Tracking Tasks

To display the Tasks list, tap its tab in the Tab bar at the bottom of the screen. If the Tasks list is not in the Tab bar, tap the More tab, and then tap Tasks.

The Task list displays your tasks in chronological order, based on their due date. To view the details of a task, tap it. The details of a task include:

■   Task name

- Task type

- Due date

- Completed flag

- Assigned to

- Primary contact

- Account name

- Opportunity name

- Description

While viewing a task you can tap the contact or account name to get more details, such as the phone numbers, address, email address, notes, and so on. For more information on displaying a contact's information, see Accessing Contacts.

To make changes to the task information, tap Edit.

To add a task, tap the plus button.

When adding or editing a task, you complete the following fields:

Table 10.   Task Fields

Field	Method of Entering Data	Description
Subject	Text Keyboard	The name of the task.
Type	Type List	The type of task.
Due Date	Date Picker	The date when the task is due.
Completed Flag	Check Button	Located on the Date Picker, tap either the Complete or Incomplete button.
Assigned To	Not Editable	Tasks are assigned to the person who creates them.
Primary Contact	Contact List	Tap the Primary Contact field to display your list of contacts. Choose one contact.
Account	Account List	Tap the Account field to display your list of accounts. Choose one account.
Opportunity	Opportunity List	Tap the Opportunity field to display your list of opportunities. Choose one opportunity.
Description	Text Keyboard	Optional text for your own notes.

When you are finished adding or editing a task, tap Save.

Accessing Contacts

To display the Contacts list, tap its tab in the Tab bar at the bottom of the screen. If the Contacts list is not in the Tab bar, tap the More tab, and then tap Contacts.

The top of the Contacts screen has buttons for CRM, Local, and All contacts. To display only the contacts from the Siebel Industry Application Server, click CRM. To display only the contacts from the iPhone Contacts application, click Local. To display all contacts, regardless of the source, click All.

To locate a contact you can use any of the following methods:

■ Scroll through the list

■ Tap a quick access letter on the right to jump to the last names that begin with the selected letter

■ Use the Search field at the top to display matching contacts.

■ Search the Siebel Industry Application Server.

To search the Siebel Industry Application Server, you must have a server connection. Start by tapping the Search field to display the keyboard. As you type, the locally cached data is filtered and displayed. If none of the locally cached records meets your criteria, tap the Search button. Oracle Mobile Sales Assistant queries the Siebel Industry Application Server for the matching entries that you have permission to view.

To display the details of a contact, tap the contact's entry. The details are active links: tap a phone number to call it. Tap an address and it is displayed in the Map application. Tap an email address and a new email opens with the selected address already entered.

To make changes to a contact, tap Edit.

To add a contact, tap the plus button.

When adding or editing a contact, you complete the following fields:

Table 11.   Contact Fields

Field	Method of Entering Data	Description
Name	Text Keyboard	The contact's first and last names.
Job Title	Text Keyboard	The contact's job title.
Account	Account List	Select an existing account from the list.
Phone Numbers	Number Keyboard	Enter one or more phone numbers, such as work, mobile, home, and so on.
Address	Text Keyboard	Enter an address.
Email Address	Email Keyboard	Enter an email address.

In addition, the Contact Detail screen has links and buttons, which you can use to display more information:

■ **Activities link**. Links to a list of activities associated with the contact. You can drill down on each activity to get more information.

■ **Notes link**. Links to a list of notes associated with the contact. You can drill down on each note to get more information.

■ **Log a Call button**. Tap this button to log a call with this contact.

■ **Share button**. Tap this button to share this contact with another user. Pick the user from the user list.

■ **Network button**. Tap this button to get a list of social networks (Facebook, Linked In, Naymz, and Spoke) to search for this contact. The search opens in Safari (the iPhone Web browser). Some social networking sites require that you have an account with them before you can search.

Accessing Accounts

To display the Accounts list, tap its tab in the Tab bar at the bottom of the screen. If the Accounts list is not in the Tab bar, tap the More tab, and then tap Accounts.

You cannot add or edit an account in Oracle Mobile Sales Assistant.

To locate an account you can use any of the following methods:

■ Scroll through the list.

■ Use the Search field at the top to display matching accounts.

■ Search the Siebel Industry Application Server.

To search the Siebel Industry Application Server, you must have a server connection. Start by tapping the Search field to display the keyboard. As you type, the locally cached data is filtered and displayed. If none of the locally cached records meets your criteria, tap the Search button. Oracle Mobile Sales Assistant queries the Siebel Industry Application Server for matching entries that you have permission to view.

To display the details of an account, tap the account's entry. The details include:

■ **Account name**.

■ **Site**. If there is no site, this field does not appear.

■ **Phone numbers**. If there is no phone number or fax number, the number field does not appear.

■ **Addresses**. If there is more than one address, the primary address is displayed. If there is no address, the address field does not appear.

These details are active links: tap a phone number to call it. Tap an address and it is displayed in the Map application. Tap an email address and a new email opens with the selected address already entered.

In addition, the Account Detail screen has links which you can use to display more information:

■ **Contacts link**. Links to a list of contacts associated with the account. You can drill down on each contact to get more information.

■ **Account Team link**. Links to a list of users who are on the account team. You can drill down on each user to get more information.

■ **Activities**. Links to activities that are related to this account. You can drill down on each activity to get more information.

■ **Notes**. Links to notes related to this account. You can drill down on each note to get more information.

■ **Log a Call button**. Tap this button to log a call with this contact.

■ **Share button**. Tap this button to share this contact with another user. Pick the user from the user list.

■ **Network button**. Tap this button to get a list of social networks to search for this contact. The search opens in Safari. Some social networking sites require that you have an account with them before you can search.

Accessing Users

To display the Users list, tap its tab in the Tab bar at the bottom of the screen. If the Users list is not in the Tab bar, tap the More tab, and then tap Users.

Users are similar to contacts, except that the user list is restricted to other users of the Siebel industry application. For more information on contacts and how to access contact information, see "Accessing Contacts" on page 34.

Accessing Opportunities

To display the Opportunities list, tap its tab in the Tab bar at the bottom of the screen. If the Opportunities list is not in the Tab bar, tap the More tab, and then tap Opportunities.

The Opportunities list displays more than just opportunity names. It also displays the projected revenue and probability. You can sort the list using any of those three pieces of information. To switch the sort method, tap the Sort button.

To find an opportunity you can search by the opportunity's name (using the Search field on the left), or by the account name (using the Search field on the right).

To display the details of an opportunity, tap its entry.

You can edit and delete opportunities, but you cannot add them. To make changes to an opportunity, tap Edit.

When editing an opportunity, complete the following fields:

Table 12.   Opportunity Fields

Field	Method of Entering Data	Description
Name	Text Keyboard	The opportunity's name.
Account	Account List	Select an existing account from the list.
Revenue	Number Keyboard	The projected revenue for the opportunity.
Close Date	Date Picker	The date you expect to close the deal.
Probability	Number Keyboard	The probability that the deal closes as expected.
Next Step	Text Keyboard	A note for your reference about the next step in the process.
Forecast	Switch	Indicate if the account should be included in the forecast.
Description	Text Keyboard	A description of the opportunity and anything else of interest.
Participants	User List	Select the existing users who are participating in working on this opportunity.

Customizing the Tab Bar

You can customize which four features appear on the Tab bar at the bottom of the screen. All remaining features are accessible through the More tab. To customize the Tab bar, tap the More tab, and then tap Edit. The Configure screen appears. To replace an existing tab bar selection with a different feature, drag its icon from the top down to the one of the four available tabs. The icons on the top do not move or disappear, they are for permanent reference.

The features available are:

■ Accounts

■ Calendar

■ Contacts

■ Notes

■ Opportunities

■ Tasks

■ Today

■ Users

About Data Retrieval

Oracle Mobile Sales Assistant works with data from two different data sources. It can retrieve data from:

■ The Siebel industry application

■ The iPhone Contacts application

This topic describes how Oracle Mobile Sales Assistant handles the following data from the two sources:

■ Contacts lookup

 When you open the Contacts screen, Oracle Mobile Sales Assistant displays a combined list of up to 200 contacts from the Siebel Industry Application Server and contacts from the iPhone Contacts application.

  ■ To display only contacts from the Siebel Industry Application Server, tap the CRM button.

  ■ To display only contacts from the iPhone Contacts application, tap the Local button.

  ■ As you type in the Search field, the contact list is filtered based on the search term you enter. Only contacts with a first name or last name matching the search term are displayed. This list shows only contacts stored in the local data cache and iPhone contacts application.

■ You can tap the Search button on the keyboard to search for any matching contacts in the Siebel industry application.

■ Account lookup

 When you open the Accounts screen Oracle Mobile Sales Assistant displays a list of up to 200 accounts from the Siebel Industry Application Server.

  ■ As you type in the Search field, the account list is filtered based on the search term you enter. Only accounts with a name matching the search term are displayed. This list shows only accounts stored in the local data cache.

  ■ You can tap the Search button on the keyboard to search for any matching accounts in the Siebel industry application.

■ User lookup

 When you use Oracle Mobile Sales Assistant to search for a user, it searches only data in the Siebel Industry Application Server.

■ Contact data edit

 When you edit and save a contact that is stored in both your iPhone device and the Siebel Industry Application Server, Oracle Mobile Sales Assistant automatically saves the data in both sources.

■ Opportunity or user data edit

Oracle Mobile Sales Assistant does not support adding or editing of user data. It allows editing of opportunity data (but not the opportunity sales stage), but not adding opportunities.

■ Tasks or appointment data

When you create a task or appointment, Oracle Mobile Sales Assistant saves the data only to the Siebel Industry Application Server.

■ Call notes

When you create call notes, Oracle Mobile Sales Assistant stores the data only on the Siebel Industry Application Server.

■ Custom fields are not supported by Oracle Mobile Sales Assistant. You cannot change the fields that are displayed by Oracle Mobile Sales Assistant. If you rename a field in the Siebel industry application, Oracle Mobile Sales Assistant does not reflect the new field name.

■ Description fields are limited to 1998 characters for task, appointment, and opportunity records. You cannot edit records with a description field of 1999 or more characters within Oracle Mobile Sales Assistant.

About Data Caching

Oracle Mobile Sales Assistant maintains a cache of data downloaded from the Siebel Industry Application Server. This cache is limited to accounts, appointments, contacts, opportunities, tasks, and users queried from the Siebel Industry Application Server. The purpose of the cache is to let you work with the existing data when a network connection is not available.

All cached information is deleted when you remove the Oracle Mobile Sales Assistant application from the mobile device.

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