

Oracle® Sales Offline
Implementation Guide
Release 12.1
Part No. E13565-02

April 2009

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Send Us Your Comments

Oracle Sales Offline Implementation Guide, Release 12.1

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12.1 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 Sales
- Microsoft Excel - Oracle Sales Offline is a Microsoft Excel workbook which allows you to work in a disconnected fashion. Oracle Sales Offline works on a client-server based architecture. The client code is written in Visual Basic for Applications (VBA) using macros.
- 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, 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, page A-1 describes descriptive flexfield support.

See Related Information Sources on page ix for more Oracle Applications product

information.

TTY Relay Access to Oracle Support Services

To reach AT&T Customer Assistants, dial 711 or 1.800.855.2880. An AT&T Customer Assistant will relay information between the customer and Oracle Support Services at 1.800.223.1711. Complete instructions for using the AT&T relay services are available at <http://www.consumer.att.com/relay/tty/standard2.html>. After the AT&T Customer Assistant contacts Oracle Support Services, an Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process.

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Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

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Structure

- 1 Introduction to Oracle Sales Offline**
- 2 Implementing Oracle Sales Offline**
- A Descriptive Flexfield Information**

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at <http://otn.oracle.com/documentation>.
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **About Documents and Release Notes** - Refer to the About Document or Release Notes for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents and Release Notes are available on My Oracle Support.
- **My Oracle Support Knowledge tab** - The My Oracle Support Knowledge tab lets you browse the knowledge base by technology, industry, integration, application, documentation, training, and services, to find all documents for a product area. Use the Knowledge Home to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.
- **Oracle E-Business Suite Electronic Technical Reference Manuals** - Each Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support as part of Online Documentation.

Guides 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) of an Oracle Applications product. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Quoting Implementation Guide

Oracle Quoting enables organizations propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle. This guide describes how to set up quote statuses to indicate the evolution of a quote to an order, define status transition rules, set up defaults for an operating unit, and define credit check rules. You must also set up integration with Oracle Sales Contracts, Oracle Incentive Compensation, Oracle Territory Manager, and Oracle Approvals Management.

Oracle Sales Offline User Guide

Oracle Sales Offline is a mobile sales application that uses templates to enable sales representatives remotely manage their day-to-day sales activities. You do not have to log into Oracle Sales to download and upload the template and template data. Oracle Sales Offline works with Oracle Sales and with Oracle TeleSales to create a virtual sales team that enables the sharing of opportunities, contacts, notes, and other customer information between sales team members. You can use Oracle Sales Offline to manage leads and opportunities, build forecasts from opportunities, manage customers, maintain and develop customer quotes, and create and manage assigned tasks.

Oracle Sales Implementation Guide

This guide enables you to set up users, user groups, and roles, define forecast categories that group products and services to be included in a forecast, set up and enable currency conversion, and set up the sales dashboard linking the sales funnel to sales stages of a sales methodology. You can also set up Oracle Sales and Oracle Telesales interoperability and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Trade Management, Oracle Partner Management, and Oracle Incentive Compensation.

Oracle TeleSales Implementation Guide

This guide describes how you can set up Oracle TeleSales so telesales agents can convert a sales inquiry or a customer call into an order. You must set up agent and customer interaction tracking, enable web directory assistance for agents, enable web collaboration, set up opportunity forecasting so agents enter forecast amounts for a product line and receive sales credits, and set up marketing source codes to track the marketing activity responsible for a sale or a sales activity. Oracle TeleSales interacts with Oracle Scripting, Oracle Email Center, Oracle Marketing, Oracle Territory Manager, Oracle Product Lifecycle Management, Oracle One-to-One Fulfillment, Oracle Universal Work Queue, Oracle Sales, and Oracle Quoting.

Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Oracle Trading Community Architecture Technical Implementation Guide

This guide provides technical information on the various integration features such as APIs and business events that you can avail to connect into external systems and transact data between these systems through a data hub using the Trading Community Architecture data model. This means that you can create or update in one system and ensure that the change is reflected in the other systems. You can manipulate data at the granular Oracle Trading Community Architecture entity level such as party site or party relationship or at the higher business object level such as person. Use this guide to learn about available APIs, their functions, parameters, and validations and how to use them. You can also find details on the business events and how to subscribe to them.

Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

Installation and System Administration

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 Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle Applications architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

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 forms so that they integrate with Oracle Applications. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle Applications Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle Applications. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle Applications Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

Oracle Applications Maintenance Utilities

Use this guide to help you run the various Applications DBA (AD) utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle Applications file system and database.

Oracle Applications System Administrator's Guide Documentation Set

This documentation set provides planning and reference information for the Oracle Applications System Administrator. *Oracle Applications System Administrator's Guide - Configuration* contains information on system configuration steps, including defining

concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle Applications System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle Applications System Administrator's Guide - Security* describes user management, data security, function security, auditing, and security configurations.

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 tells you how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Flexfields Guide

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

Oracle Applications Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle Application such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operation units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

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 tells you how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups

that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle E-Business Suite Diagnostics User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Diagnostics framework.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle iSetup User Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Lifecycle Management Implementation Guide

This guide describes how you can define hierarchies of items using structure types, catalogs, and catalog categories, and define change categories and configure them for revised items or request lines. Oracle Product Lifecycle Management provides several predefined catalogs such as the Product Catalog, Asset Catalog, and the Service Catalog and predefined change categories such as change orders and ideas. Use this guide to learn how to define additional catalogs for browsing and reporting purposes and new change categories specific to your business needs. You can then learn how to set up users and responsibilities that provide or restrict access to these catalogs, catalog items, and change management objects.

Oracle Product Lifecycle Management User Guide

This guide describes how to create and manage catalogs, create and maintain product

attributes and attribute values, and manage item statuses and lifecycle phases. You can learn how to create change categories, create task templates for change orders, and create change management reports. In addition, you can use this guide to create roles, map roles to privileges, and maintain these roles.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle Applications report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product and

reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any 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 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 your product 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 Oracle server, and your hardware and software environment.

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 to Oracle Sales Offline

This chapter covers the following topics:

- Oracle Sales Offline Overview
- Oracle Sales Offline Prerequisites
- Template Versioning and Upgrading Oracle Sales Offline Templates
- Oracle Sales Access
- Date Picker for Oracle Sales Offline
- Oracle Sales Offline Features
- Downloading the Oracle Sales Offline Application
- Multi-Operating Unit Access
- Version and Template Identification
- Synchronization in Secure Socket Layer (SSL) Environment
- Multiple Mid-Tier Instance
- Forecast Information
- Conflict Resolution
- Non-Validated Records

Oracle Sales Offline Overview

Oracle Sales Offline gives you the information you need to remotely manage your sales efforts, and offers sales organizations the functionality required in an interface that is both familiar and effective. Leveraging the capabilities of desktop applications, Oracle has designed a template that provides sales organizations a way to manage sales information without the need to install additional software.

The template is downloaded from Oracle Sales and provides upload/download data capabilities. Oracle Sales Offline provides you with the ability to view and edit sales

information, while your support organization does not have to support any additional technical software on laptops.

To manage and close deals successfully, sales teams often cross group boundaries, territories and even company lines. Oracle Sales Offline works with Oracle Sales and with Oracle TeleSales to create a virtual sales team that enables the sharing of opportunities, contacts, notes, and other customer information between sales team members. You can automatically or manually assign opportunities to sales members. Sales representatives can see information from partners about their accounts as they prepare for on site meetings. Oracle's sales automation modules complement each other and provide the solution for team selling in a dynamic environment.

Oracle Sales Offline imports and exports (synchronizes) information from an Oracle enterprise database, and enables you to view and update your sales information remotely via your laptop computer. You can add, view and edit customers, opportunities, leads, quotes, and tasks from your laptop, saving the changes for subsequent upload.

You can optimize your selling time in the field by having key customer information readily available. This enhances your relationships with customers and promotes company profitability. Oracle Sales Offline integrates with the Oracle Sales applications, and is designed to maximize sales effectiveness in the mobile environment. Oracle Sales Offline is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

Oracle Sales Offline Prerequisites

The following information describes the prerequisites for Oracle Sales Offline.

Oracle Applications:

- Oracle Sales v. 12.0
- Oracle Quoting
- Oracle Web Applications Desktop Integrator

System Requirements

- Windows 95/NT/2000 operating system
- Microsoft Excel 2000/XP/2003
- Microsoft Internet Explorer
- Licensed copy of WinZip, PKZIP, or WinRAR
- Microsoft Windows Common Controls-2 6.0 (Mscomct2.ocx)

System Recommendations

- 500 MHz or higher processor
- 256 MB RAM or higher

To increase your knowledge of Oracle Sales Offline, Oracle provides many sources of information including documentation, training and support services. We recommend that you review the *Oracle Sales Implementation Guide* Release 12 and the *Oracle Sales User Guide* Release 12 in addition to using the Oracle Sales application. There are also a number of Oracle Sales training classes available through Oracle University including an Oracle Sales Fundamentals course.

Template Versioning and Upgrading Oracle Sales Offline Templates

Before you upgrade Oracle Sales Offline with the latest patch, you 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 you do not complete this step, you will not be able to synchronize using an older template after the patch is applied.

Oracle Sales Access

You need access to Oracle Sales to download the Oracle Sales Offline template. You also need a valid Sales responsibility to complete the download. See the *Oracle Sales Implementation Guide* for details.

Date Picker for Oracle Sales Offline

Sales Offline supports a Date Picker for the Calendar. To ensure that the Date Picker works properly, install the file Microsoft Windows Common Controls-2 6.0 (Mscomct2.ocx). Before installing this file, verify that it is not already installed on your computer.

Previous versions of Sales Offline displayed the date fields in the format specified by the regional settings of the current PC. However, in Release 12 the profile "ICX: Date format mask" is downloaded and the date fields are displayed in the format specified by this profile.

In Release 12, for environments where the mscomct2.ocx is present, the datepicker appears for date fields, the time picker for time fields, and the date time picker for date time fields respectively. In earlier versions of Microsoft office (for example, Office 2000), the mscomct2.ocx is available with the Microsoft Office installation. However, for later releases of Microsoft Office (for example, 2002, 2003), the mscomct2.ocx (which

supports the date, time and datetime picker) is not available.

Follow these steps to make the mscomct2.ocx available:

- Download the mscomct2.ocx from the Microsoft site to the system32 folder.
- Register the mscomct2.ocx by running the following command in Start->Run:
regsvr32 "<path of OCX>\mscomct2.ocx"
- After successful registration, Open Microsoft Excel. Go to the Menu: Tools -> Macro -> Security-> Trusted Sources/Publisher tab and check the option "Trust access to Visual Basic Project".
- Reopen the Sales Offline template.

Oracle Sales Offline Features

The following information describes some of the features included in Oracle Sales Offline.

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 Sales.

The Common Product Catalog is set up in Oracle Product Lifecycle Management and manages product hierarchy. Sales and Marketing seeds a hierarchical catalog called Product. You can either use this seeded catalog or create a new product hierarchical catalog with Product Categories.

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

Status Bar Messages

Status bar messages display during file open, synchronization, file save, and file close operations. Status bar messages are reported as each processing phase occurs. For example, if the phase is 'save contacts', the message 'Saving Contacts' displays.

The messages related to sync are also displayed in the Sync Console window. In this window, click Show to expand the Sync Console and show synchronization processing messages or click Hide to hide the processing messages.

Client Logging

Oracle Sales Offline client log stores messages about these activities:

- Opening the template
- Loading sheets
- Synchronizing data

The timing statistics which are logged enable administrators to analyze Oracle Sales Offline's performance and identify issues that may arise when a large volume of records are processed.

The log file, aslclient.log, is located in the logs directory in the folder containing Oracle Sales Offline. Oracle Sales Offline supports the following kinds of log messages:

- Statement
- Procedure
- Event
- Timing
- Exception
- Error
- Unexpected

The two types of logging available are:

- **Normal:** Set at Oracle > Logging > Normal. The log messages of type TIMING, EXCEPTION, ERROR, and UNEXPECTED appear on the client log file if you select this option. By default, the timing log is always enabled.
- **Detailed:** Set at Oracle > Logging > Detailed. All types of log messages appear on the client log file if you select this option.

Note: Each time you open the Oracle Sales Offline template, the log file is copied to a .bak file and the .log file is cleared. To view the log, look at the log in the logs directory before you open the template. To restart logging, select Oracle > Logging > Reset. This deletes the existing log file and starts a new one during the current session.

Downloading the Oracle Sales Offline Application

You must download Oracle Sales Offline from 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 to enable the Sales Offline Template Download page under the Oracle Sales, Preferences link, where users can download the Oracle Sales Offline application:

- Add Oracle Sales Offline Preference Menu (ASL_PREFERENCE_MENU) as a submenu under Sales Dashboard Home Page Menu (ASN_HOME_MENU).
- After you save the submenu, run the Compile Security concurrent program manually with Yes for the parameter. Bounce the server to display the new menu addition.

Next, follow these steps to download Oracle Sales Offline:

1. Log into Oracle Sales, with a valid Oracle Sales user responsibility.
2. Click the Preferences link.
3. Create a new folder in a directory.
4. 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.

Note: The Sales Team Driven download is the default download type. There is no radio button to select the download type in the Sync Preferences page.

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.

You can further filter data using the Sync preference filters. You can save these preferences 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 Common Product Catalog), Inventory Category, Price List, Operating Unit

Note: Select items (from the Default Category Set or the Price List) for download. You can select items from multiple categories. Select multiple items by highlighting a row and using the Ctrl or Shift functions.

Note: If the price lists are not displayed, ensure the 'Mobile Download' checkbox is selected for the price list in the Advanced Pricing Price List application.

- **Customer Preferences** - can be filtered by Customer Category and Country

Multi-Operating Unit Access

Oracle Sales Offline downloads the profile ASO:Operating Unit Override. This profile allows system administrators to always default the users default operating unit into a newly created quote. If set to No (default), the operating unit associated to a new Quote and the Operating Unit available in the Sync Preferences, Quote tab will be your default Operating Unit and it will be read only, non-editable.

If the ASO:Operating Unit Override is set to Yes, the operating unit values available in the Sync Preferences, Quote tab will be all the Operating Units associated to your login responsibility. Any newly created quotes will contain the Operating Unit value you selected in the Operating Unit dropdown of the Sync Preferences, Quote tab.

Oracle Sales Offline will also download the profile MO: Default Operating Unit. These two profiles are described in the following table.

Profile	Description	Values
ASO: Operating Unit Override	Quote profile that allows users to override operating unit associated to a quote. In Oracle Sales Offline, this profile will/will not allow users to change the Operating Unit on the Sync Preferences, Quote tab.	Yes, No and Null for Site, Application, Responsibility, and User levels. Default = No
MO: Default Operating Unit	Defaults the users default Operating Unit into the Operating Unit dropdown of the Quote Tab - Sync Preferences form.	Operating Units available to the user/application. Default: None

Using the Operating Unit in Oracle Sales Offline obsoletes the Quote profile ASO:Default Order Type.

Sync Preferences Form

The Quote tab in the Sync Preferences form contains an Operating Unit dropdown displaying your default operating unit and any other operating unit you are associated with. The operating unit is linked to your login responsibility and your default operating unit is derived from the profile MO: Default Operating Unit. You can only select one Operating Unit from the dropdown.

Sync Preference Product Information

The Quote tab in the Sync Preferences form displays product information containing values associated with the Operating Unit you selected in the Operating Unit dropdown menu. The Inventory Category Set, Inventory Category are not dynamically generated based on the value in the Operating Unit dropdown. Additionally, Price List and Product will be filtered based on the Operating Unit selected.

Existing Quotes in Sales Offline

You must be on the Sales Team of any Quote you want to download and only the Quotes associated with the Operating Unit you selected in the Sync Preferences form will be downloaded to Sales Offline.

New Quotes in Sales Offline

Any quote created in Sales Offline will be associated to the Operating Unit you selected in the Sync Preferences, Quote tab. This operating unit value will be displayed as read only on the Create Quote or Quote Details forms.

Defaulted Attributes

When you create a new quote (or a new quote is created via the opportunity to quote flow) certain attributes will default based on the Operating Unit associated to the Quote as described in the following table:

Attribute	Description
Order Type	This attribute defaults depending on the Operating Unit you selected in the Sync Preferences, Quote Tab. You can change the attribute before the Quote has been saved. The Order Type to Operating Unit is setup in the online system parameters.
Price List	You can select any Price List you have downloaded to Sales Offline. The Price List available on the Quote forms is based on the Price List(s), displayed in the Sync Preferences, Quote Tab.
Primary Sales Person	The default value for this field on the Create Quote page is determined by the HR setting Organization Additional Information. You can select other sales reps (who are associated to the Operating Unit you selected in the Sync Preferences, Quote tab) in the dropdown. Once the quote is saved, this field becomes non-editable.

To correctly display these 'default' attributes for it's associated Operating Unit, you must download the Operating Unit to Order Type system parameters. The product information displayed in the Select Product LOV's will be those products associated to the Operating Unit you selected in Operating Unit dropdown in the Sync Preferences, Quote Tab.

Opportunities in Oracle Sales Offline

Each Opportunity created in Oracle Sales Offline will be stamped with the name of the Operating Unit you selected in the Sync Preferences form. There is no functional impact for this. You will only be able to add products (inventory items) to an Opportunity – Product Category, which have been mapped to that Product Category and which have been associated to your Operating Unit selected in the Sales Offline, Sync Preferences – Quote tab. If you did not select an Operating Unit in the Sales Offline, Sync Preferences – Quote tab, the following message displays, and nothing will be saved:

"To create a new Opportunity you must choose an Operating Unit in the Sync Preferences form. Please select an Operating Unit and perform a synchronization in to create a new Opportunity."

Version and Template Identification

Oracle Sales Offline provides a version number that identifies the version of the client you are using. This enables you to provide support personnel with a unique version number that identifies the implemented client version. Navigate to Oracle > About Sales Offline to find the version number.

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.

Synchronization in Secure Socket Layer (SSL) Environment

For Oracle Sales Offline synchronization in an SSL enabled environment you must download the Sales Offline template from an SSL (https) URL. If the SSL Acceleration is configured in a Load Balanced Environment, set the "ASL: Excel SSL Acceleration On" profile to Yes along with the ASL:Excel Server Host and ASL:Excel Server Port profiles. See General System Profiles, page 2-7 for information on these profiles

Multiple Mid-Tier Instance

If you have a multiple mid-tier instance, you do not have to create a shared directory as required in previous versions of Oracle Sales Offline. You can set the profile BNE Upload Staging Directory to a directory having read/write permissions for Apache users on each mid-tier instance. If this profile value is not set, the system will use a temp folder for writing data.zip.

Forecast Information

Oracle Sales Offline supports forecast information at the Opportunity line level. You can edit Best, Forecast, and Worst amounts for each opportunity line. The Opportunity should have a forecastable status. You can view (read only) Forecast Details but not edit this information.

By default the Forecast field is a summation of all the Forecast fields in the Opportunity Purchase lines. The Forecast field is displayed on the opportunity header level. The Amount field on the opportunity header contains the total purchase line amount. For example, if you add a new purchase line with a new forecast amount of \$500, the Forecast field at the header level will increase by \$500. Any changes or deletions to an

existing opportunity line will also be reflected in the Forecast field at the header level.

In Oracle Sales Offline the Opportunity Details and Opportunity Create forms will contain Best, Forecast, and Worst columns. These forms also contain a Forecast Details button. When you click the Forecast Details button the Forecast Details information will be downloaded from the online applications for existing opportunities. Forecast details will be generated for new Opportunities created in Oracle Sales Offline. For downloaded, existing opportunities, the Forecast Details form will display existing revenue and non-revenue information already saved in the online applications. For additional information on revenue and non-revenue credits see the *Oracle Sales Offline User Guide*.

You can set the defaults for forecast amounts (Best, Forecast, Worst) for opportunity lines using the ASN:Forecast Defaulting Type profile option. For information on how the Best, Forecast, and Worst values are calculated refer to the *Oracle Sales Offline User Guide*.

Conflict Resolution

In Oracle Sales Offline, Conflict Resolution support is available in all modules - Opportunity, Organization, Contact, Person, Lead, Task and Quote modules. Sales Team information is not supported in Conflict Resolution.

Note: Enhanced conflict support is not available for Lead, Task and Quote modules.

All Sales Credit (Forecast Credit) conflicts will be associated to the parent record, and placed in the appropriate parent records table.

Oracle Sales Offline Conflict Resolution associates the header (parent) and line (children) records. If a conflict occurs for a line record, the line record will display in the appropriate parent objects table. The header of the line record will display directly above the line record allowing you to clearly decipher which parent record the line is associated with.

For Leads and Opportunities if multiple line records for one header are captured in conflict resolution, each line record will be placed directly below the header record, and will be separated accordingly. If there are multiple line conflicts for one header, these line conflicts will be grouped together in the table for display.

The following table summarizes Conflict Resolution.

Conflict Resolution Scenario	Conflict Resolution Summary Sheet	Conflict Resolution Detail Form	
Header Only Conflict	<p>The Header record is displayed and hyperlinked. Click on the header record to display the conflict resolution form.</p>	<p>Header record is displayed in the conflict details form. You can either reapply or discard the header record.</p>	
Header Conflict and Line (one or many) Conflict	<p>The Header record conflict is displayed and hyperlinked. Click on the header record to display the conflict resolution form. Each Line record(s) conflict is displayed separately from the Header record conflict record.</p> <p>Each Line record conflict is hyperlinked, and the associated Header record is displayed directly above the conflicted Line(s). Click on each Line record to display the conflict resolution form. Note that this is applicable for Quotes only.</p>	<p>For the header conflict, the Header record is displayed in the conflict details form, and you can either reapply or discard the header record. Only the header record will get reapplied or discarded. The child conflicts should be resolved before the header conflicts are resolved (reapplied or discarded).</p>	<p>For the line (one or many) conflict, the Line record is displayed in the conflict details form, and you can either reapply or discard the Line record. Only the line record will be reapplied or discarded. Basic header information is displayed in a frame on the Line conflict form.</p>
Line Conflict	<p>The Line record(s) conflict is displayed and hyperlinked. The Line record's associated Header record is displayed directly above the Line record(s) conflict, but the Header is display only, and not hyperlinked. You can click on the Line record and the conflict resolution form will pop up.</p>	<p>The Line record is displayed in the conflict details form, and you can either reapply or discard the header record. Basic header information is displayed in a frame on the Line conflict form.</p>	

Non-Validated Records

Oracle Sales Offline supports Non Validated Records (NVR) for the Opportunity, Organization, Contact, Person, Lead, Task and Quote modules. The following table describes Non Validated records.

Non Validated Record Scenario	Non- Validated Record Summary Sheet (table)	Non-Validated Record Form
Header Only NVR (lines will not get applied because the header did not pass server validation)	The Header record is displayed and hyperlinked. You can click on the header record to display the NVR form. Line records will display but will not be hyperlinked.	The Header record is displayed in the NVR form, and you can either reapply or discard the header record. On reapply or discard all the line records will also be reapplied or discarded.
Header passes server validation (or the header was already synchronized and established), but the line record or multiple lines do not pass validation.	The Header record is displayed, but not hyperlinked. The line record, displayed directly below the header record, is hyperlinked.	The Line record is displayed in the NVR form, and you can either reapply or discard the line record.

Implementing Oracle Sales Offline

This chapter covers the following topics:

- System Administration Tasks
- Configuring Tab Display (Optional)
- Customizing Hot Keys
- Oracle Sales Offline Profile Categories
- System Profile Options Used by Oracle Sales Offline
- Troubleshooting Tips

System Administration Tasks

To implement Oracle Sales Offline:

1. Ensure that you have fully implemented Oracle Sales.
2. Ensure that you have licensed Oracle Sales and applied Oracle Sales Offline patches using ADpatch.
3. After applying the patches, clear the _asl and _bne cache.
4. If you are implementing Flexfields, refer to Descriptive Flexfield Support, page A-1.
5. Restart the application server.

Configuring Tab Display (Optional)

Optionally, you can use the ASL_XLS_MAIN_MENU menu to control the display of tabs in Oracle Sales Offline.

Note: Configuring the tab display applies to the Quotes tab only.

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 locate 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.

Customizing Hot Keys

In the Sales Offline summary sheet Hot Keys are provided for:

- Main tabs - Home, Tasks, Lead, Opportunity, Quote, and Customer
- Subtabs - Home, Conflict Resolution, Organization, Contact and Person
- Global buttons - Calendar, Profile and Sync
- Action buttons - Reapply, Discard, Save and Create

All hot keys are defined by an underline and you can access the Hot Keys with the key combination of {Ctrl+Alt}.

Using the System Administrator responsibility, launch the Menus form and edit the prompt for the ampersand '&' character position. The hot key will be the first character after the ampersand '&'. For example, in &Home H is the hot key for the Home Tab.

Menu	Function
ASL_XLS_MAIN_MENU	Controls hot keys for main tabs
ASL_XLS_HOME	Controls hot keys for Home and Conflict Resolution sub tabs
ASL_XLS_CUSTOMER	Controls hot keys for Organization, Contact and Person sub tabs
ASL_XLS_ROOT_MENU	Controls hot keys for Calendar, Profile and Sync global buttons

Using the Application Developer Common modules responsibility, launch the Define Attributes form and edit the label for the ampersand '&' character position. The hot key will be the first character after the ampersand '&'. For example, in &create C is the hot key for the Create button.

Attribute	Function
ASLX_SUM_REAPPLY	Controls hot key for Reapply button
ASLX_SUM_DISCARD	Controls hot key for Discard button
ASLX_SUM_SAVE	Controls hot key for Save button
ASLX_SUM_CREATE	Controls hot keys for Create button

Task Summary Sheet

To toggle the remove checkbox on the task summary sheet follow these steps:

1. Set prompt ASLX_REMOVE_TASK_KEY to the value you want to use as the hotkey. A valid setup is a single character
2. Navigate to the cell containing the remove checkbox using the Up/Down Arrow keys.
3. Click Ctrl + Alt + Hot Key from the keyboard to toggle the value of the remove checkbox.

Oracle Sales Offline Profile Categories

The Profile Options in Oracle Sales Offline are contained in one of the following five categories:

- **Deployment:** Profiles that must be set up for Oracle Sales Offline to run. These include items such as file paths, ports, hosts, and performance optimizations.
- **Download and Default Category:** Use these profiles for upgrade or maintaining backwards compatibility.
- **Debug:** Profiles that enable debug/diagnostic features.
- **Security:** Profiles related to security features, including access control, authentication, auditing, encryption policies, and intrusion detection settings. Examples include Hide Diagnostics, Guest User Password, Signon Audit and Session Timeout.
- **UI or Interaction:** Profiles that are cosmetic or productivity preferences. In general, these are things users set as a 'preference'. For example, language, date format, colors, number of rows in a table, or default date.

The following table lists each Sales Offline Profiles and the profile's corresponding category. Note that these profiles are downloaded from Oracle Sales.

Profile Category	Profile
ASL_Deployment	ASL: Excel Server Host
	ASL: Excel Server Port
	ASL: Excel Registry Key for Compression Tool Location
	ASL: Excel Compression Tool Executable
	ASL: Excel Compression Tool Command Line Option
	ASL: Excel SSL Acceleration On

Profile Category	Profile
ASL_Download and Default	ASL: Campaign Code Download Threshold ASL: Download ALL_ITEM Price List Lines ASL: Download Service Items 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 Inventory Category 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 Price List ASL: Excel Sales Channel ASL: Excel Sales Marketing Inventory Category ASL: Excel Sales Stage ID ASL: Excel Start Period ASL: Excel Timeframe ASL: Excel To Win Probability ASL: Operating Unit Sync Preference
ASL_DEBUG	ASL:Excel Debug ASL: Turn on SQL Trace

Profile Category	Profile
ASL_Security	ASL_EXCEL_LAST_SYNC_TIME ASL:Enable Sync Engine
ASL_UI	ASL: Default Business to Customer ASL: Remove Organization Create Button ASL: Remove Person Create Button ASL: Remove Contact Create Button ASL: Summary Hyperlink Optimization ASL: Summary Autofit Optimization ASL: Default Quote Contact

System Profile Options Used by 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 - Maintenance*.

The profiles described are:

- General System Profiles, page 2-7
- User Preference Profiles, page 2-8
- Synchronization Time Profile, page 2-8
- Price List Lines Profile, page 2-9
- Downloaded Online Application Profiles, page 2-11
- Quote Profiles, page 2-13
- Opportunity Profile, page 2-13
- Improve Summary Sheet Load Time Profiles , page 2-13
- Synchronization Profile, page 2-14
- SSO Profiles, page 2-15

- Defaulting Contact and Address Profile, page 2-15

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 OC4J 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 if you 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 Yes if you want to download services for Quoting module.
- **ASL: Excel Server Host** - Set this value in a Multi-Node Load Balanced Environment to override the server name defaulted in the Oracle Sales Offline template. The profile value must be set to the external host name.
- **ASL: Excel Server Port** - Set this value in a Multi-Node Load Balanced Environment to override the server port defaulted in the Oracle Sales Offline template. The profile value must be set to the external port number.
- **ASL: Excel SSL Acceleration On** - Set this profile to Yes if the environment has SSL enabled.
- **ASL: Turn On SQL Trace** - If set to Yes, a SQL trace file is created for each synchronization in 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: Campaign Code Download Threshold
- ASL: Download Service Items
- ASL: Excel Customer Category
- 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 Price List
- ASL: Excel Sales Channel
- ASL: Excel Sales Marketing and Inventory Category
- 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 your 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.

Profiles Deleted from Sales Offline

The following profiles are not used in Sales Offline. They are listed here for your information.

- ASL:Enable Outlook Integration
- ASL: ACCESS_CALLOUTS
- ASL: Conflict Flag
- ASL:Debug
- ASL: Enable Attachment
- ASL: Enable Configurator
- ASL:Laptop Default Responsibility
- ASL: Enable Encyclopedia
- ASL: Enable Selective Download
- ASL:Excel Save User Directory
- ASL:SSL HTTP Port Number
- ASL:Remove Upload My Changes Checkbox
- ASL:Use Secured Server Connection

- ASL_WRAPPER_DEBUG

Oracle Sales Offline/Oracle Sales Profiles

Oracle Sales Offline does not support the existing Data Quality Management (DQM) features used in Oracle Sales. The following profile options allow you 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.

Sales Offline Profile	Description	Values
ASL: Remove Organization Create Button	When set to Yes, the Organization create buttons will be removed in ASL.	Yes/No Default=No
ASL: Remove Person Create Button	When set to Yes, the Person create buttons will be removed in ASL.	Yes/No Default=No
ASL: Remove Contact Create Button	When set to Yes, the Contact create buttons will be removed in ASL.	Yes/No Default=No
ICX: Date Format Mask	Keeps the date look and feel consistent between the online and offline applications.	The American English default is DD-MON-RRRR, for example, 12-NOV-2002.

You no longer have to maintain two sets of profiles to use Oracle Sales Offline. Oracle Sales Offline will download and leverage the following Sales profiles. You do not have to set the corresponding Oracle Sales Offline profile option separately.

Former Sales Offline Profile	Sales Profile Equivalent Downloaded	Description	Values	Default
OS:Default Opportunity Win Probability	ASN: Default Opportunity Win Probability	When an opportunity is created, this value defaults into the create page.	Based on win probability values set up in admin page.	N/A

Former Sales Offline Profile	Sales Profile Equivalent Downloaded	Description	Values	Default
OS:Default Sales Channel	ASN:Default Opportunity Sales Channel	When a lead or opportunity is created, this value defaults into the create page.	Based on values set up for sales channel.	N/A
OS:Default Opportunity Status	ASN:Default Opportunity Status	When an opportunity is created, this value defaults into the create page.	Based on statuses set up with applicability to "Opportunity" selected.	N/A
OS: Default Close Date Days	ASN: Default Close Date Days	When an opportunity is created, this value drives the data that is defaulted into the create page.	Numeric Field	30 Days
OS:Default Win/Loss Status	ASN:Default Win/Loss Status	This value determines the win/loss status when a product is added to an opportunity.	Based on lookup ASN_WIN_LOSS_STATUS	None
OS:Default Status for Leads	ASN:Default Lead Status	When a lead is created, this value defaults into the create page.	Based on statuses set up with applicability to "Lead" selected.	N/A
OSO:Forecast Pipeline Calculation Basis	ASN:Forecast Defaulting Type	Users can add, edit, and create Forecast information within an Opportunity in ASL.	Pipeline (values are pipeline and win probability).	N/A
OSO: Default Country	ICX:Territory	Use to default address style in address form	Standard set of values set up for eBusiness suite.	N/A

Former Sales Offline Profile	Sales Profile Equivalent Downloaded	Description	Values	Default
OSO: Default Forecast Currency	ICX: Preferred Currency	Use to default currency in lead and opportunity creation.	Standard set of values set up for eBusiness suite.	N/A

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:

- OS: Address Required for Opportunity
- OS: Address Required for Organization
- OS: Address Required for Person
- OS: Address Required for Sales Lead
- OS: Default Budget Status for Leads
- OS: Default Channel for Lead Channel Selection or Engine
- OS: Default Lead Contact Role
- OS: Opportunity Probability Link
- OS: Sales Methodology
- OS: Source Code Mandatory for Leads
- OS: Source Code Required for Opportunity
- OS: Lead Link Status: For the Lead to Opportunity flow to work properly, the OS: Lead Link Status must be established in Oracle Sales Offline (ASL.J).
- Task Manager: JTF Tasks default date selected. See the Oracle Telesales Implementation guide for additional information.
- HZ: Default Flexible Address Format : Use to display the default address style for those countries that do not have an address style mapping.

Quote Profiles

These Quote profiles are supported:

- JTF_PROFILE_DEFAULT_CURRENCY
- ASO: Enable Approvals
- ASO: Allow Skip Approvers
- ASO: Default Ordered Qty
- ASO: Default Quote Status
- ASO: Quote Duration
- ASO: Enable Security Check
- ASO: Enable Submit Button
- ASO: Status Override
- ASO: Validate Salesrep
- ASO: New Quote Security
- ASO: Enforce Account Relationships

See the *Oracle Quoting Implementation Guide* for details.

Opportunity Profile

The AS_OPPTY PROB_SS_LINK profile controls the display of a warning or error message when the combination of the Sales Stage and Win Probability information does not pass validation. The user_profile_option_name is OS: Opportunity Probability Link.

Valid values are Warning and Error.

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

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

Improve Summary Sheet Load Time Profiles

To improve the loading speed of the summary sheets activate the optimization profiles

listed below. You can set the profiles at the site, application, responsibility, or user level.

- **ASL: Summary Hyperlink Optimization**

This profile controls the activation of the summary sheet loading hyperlink optimization. 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. The following 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 Autofit Optimization**

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

Set this profile to Yes, if you want to set the columns at predefined values to optimally accommodate the various data within the columns. The hyperlinks on each summary sheet have an associated screen tip text box containing the hyperlink value. Move the mouse over the hyperlink to display this value. When you click on a cell with truncated contents, a pop-up comment box appears displaying 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 to display a pop-up comment box showing the values of that cell.

If you do not enable the option, the application retains 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 you click Go Offline and you cannot add, modify, or save data while Oracle Sales Offline is in this mode.

The profile controls the asynchronous synchronization process.

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 profile indicates whether the synchronization engine is enabled. The synchronization engine performs the synchronization between Oracle Sales Offline and

Oracle Sales. If the synchronization engine is disabled, you cannot perform synchronizations of your offline data to the online database.

Set this option at the site level. When the ASL Uploader receives a synchronization request it checks this profile option to determine if synchronization is enabled.

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

Set this profile value to No to disable data synchronization for all users during an upgrade. The server checks this value before starting the synchronization process.

This profile value also supports version checking for an incompatible client. The numbering system for the Sales Offline client determines which version of the client can synchronize with the server. The client version number enables the server synchronization engine to determine if the client is compatible. Click on the Oracle menu in the spreadsheet to display the unique identity of the client version currently in use.

For example, during the upgrade process to the asynchronous Oracle Sales Offline template you might 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 return a message indicating that you should upgrade your client

Also, the version checking functionality determines if you are using an outdated version of Oracle Sales Offline and alerts you to download the latest version. To check your version of Oracle Sales Offline navigate to Oracle > About Sales Offline.

The profile Apps Servlet Agent is in the form `http://<server>:<port>/<context_root>`. For the OC4J techstack environment use `OA_HTML` for the `<context_root>`. The default value is `OA_HTML`. The BNE Servlet Path profile is no longer used.

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. When using Oracle Sales Offline and working in an SSO environment, store the necessary passwords in the `FND_USER`. Implement this 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 quote contacts and addresses based on business rules as described in the *Oracle Sales Offline User Guide*.

If this profile is set to No, the primary contact from the related opportunity will default;

no other defaulting will occur.

Profiles for Compression

Set up the following profiles to enable Sales Offline synchronization to work with WinZip, PKZip, and WinRAR software compression tools:

- ASL:Excel Registry Key for Compression Tool Location
- ASL:Excel Compression Tool Executable
- ASL: Excel Compression Tool Command Line Option

The profile settings required for WinZip, PKZip and WinRAR are listed in the following tables:

Default Seeded Values for WinZip

Profile	Value
ASL: Excel Compression Tool Executable	WinZip32.exe
ASL: Excel Compression Tool Command Line Option	-min -e -o
Excel Registry Key for Compression Tool Location	WinZip32.exe

PKZip Compression Utility Profile Values (PKZip command line addon is required)

Profile	Value
ASL: Excel Compression Tool Executable	PKZipc.exe
ASL: Excel Compression Tool Command Line Option	-extract = all -silent = all -over = all
ASL: Excel Registry Key for Compression Tool Location	PKZipc.exe

Profile Values for WinRAR Compression Utility

Profile	Value
ASL: Excel Compression Tool Executable	WinRAR.exe
ASL: Excel Compression Tool Command Line Option	X -ibck -inul -o+
ASL: Excel Registry Key for Compression Tool Location	WinRAR.exe

Profiles for Updating the Lead/Opportunity Owner

Oracle Sales Offline implements the following two profiles which give the login user the privilege to update the Lead/Opportunity owner:

- OS: Privilege to Change Lead Owner
- OS: Privilege to Change Opp Owner

Timezone Profile

To enable Tasks and Notes to work correctly in Oracle Sales Offline set the following time zone profile:

- Enable Timezone Conversions

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, 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 2-7 for details on setting up an error log
- Screen capture or details from the Sync Details dialog box

- Error log from the client. See Client Logging, page 1-5 for details on setting up detailed logging

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Descriptive Flexfield Information

This appendix covers the following topics:

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

Descriptive Flexfields

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

Refer to the Synchronization Profile, page 2-14 section for information on how to set up the profile Apps Servlet Agent for implementing Descriptive flexfields.

Oracle Sales Offline Opportunity and Lead Flexfields

Oracle Sales Offline supports these opportunity and lead flexfields:

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

Oracle Sales Offline Organization, Person and Contact Flexfields

Oracle Sales Offline supports these customer organization flexfields:

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

Oracle Sales Offline Task Flexfields

Oracle Sales Offline supports this task flexfield:

- Application: CRM Foundation
- Title: Tasks additional information

Oracle Sales Offline Quoting Flexfields

Oracle Sales Offline supports the following quoting flexfields:

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

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