Oracle® Sales for Handhelds

Implementation Guide

Release 12.1

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Oracle Sales for Handhelds Implementation Guide, Release 12.1

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Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Sales for Handhelds Implementation Guide.*

This book is intended for administrators responsible for implementing Oracle Sales for Handhelds.

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

- The principles and customary practices of your business area
- The Oracle Sales for Handhelds application
- Oracle Application Framework Applications
- The Oracle Applications graphical user interface

  To learn more about the Oracle Applications graphical user interface, read the *Oracle E-Business Suite User's Guide*.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at http://www.fcc.gov/cgb/consumerfacts/trs.html, and a list of phone numbers is available at http://www.fcc.gov/cgb/dro/trsphonebk.html.

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Structure

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 E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related To this Product

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and updated tasks.

Oracle Sales for Handhelds User Guide

Oracle Sales for Handhelds enables traveling sales professionals to access enterprise information from their pocket PC, Blackberry, palm-based devices, and Nokia using an HTML browser. You can use Outlook for your appointments, view emails received in outlook from contacts as Oracle Sales interaction history, and receive Short Message Service alerts for service contract expiry, escalated service requests, and invoice overdue. You can manage customers, contacts, and customer visits using your handheld.

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 interoperabiliy 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.

Installation and System Administration

Maintaining Oracle E-Business Suite Documentation Set

This documentation set provides maintenance and patching information for the Oracle E-Business Suite DBA. *Oracle E-Business Suite Maintenance Procedures* provides a description of the strategies, related tasks, and troubleshooting activities that will help ensure the continued smooth running of an Oracle E-Business Suite system. *Oracle E-Business Suite Maintenance Utilities* describes the Oracle E-Business Suite utilities that are supplied with Oracle E-Business Suite and used to maintain the application file system and database. It also provides a detailed description of the numerous options available to meet specific operational requirements. *Oracle E-Business Suite Patching Procedures* explains how to patch an Oracle E-Business Suite system, covering the key concepts and strategies. Also included are recommendations for optimizing typical patching operations and reducing downtime.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite 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 E-Business Suite 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 E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite 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 E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite 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 E-Business Suite System Administrator's Guide Documentation Set

This documentation set provides planning and reference information for the Oracle E-Business Suite System Administrator. *Oracle E-Business Suite 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 E-Business Suite 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 E-Business Suite System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle E-Business Suite development staff. It describes the UI for the Oracle E-Business Suite 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 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 E-Business Suite product 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 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 Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

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

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 e-Commerce Gateway Implementation Manual

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's 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 Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

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 E-Business Suite 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. This guide is available through the Oracle E-Business Suite online help.

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. This guide is available through the Oracle E-Business Suite online help.

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 E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

Introduction to Oracle Sales for Handhelds

Overview of Oracle Sales for Handhelds

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

Connected Handheld Browser

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

- Customers and contacts
- Opportunities
- Tasks and appointments

The supported browsers are:

- Pocket PC handheld devices running Pocket IE on Windows Mobile 2003 or Windows Mobile 5.0
- Palm based handheld devices running Blazer 3.0 browser or higher
- Nokia running Internet Browser for HTML 4.01/xHTML on Symbian 7.OS operating system
- Blackberry devices version 4.0 or higher

Oracle Sales Synchronization

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

- Appointments
- Tasks
- Contacts
- E-mail interactions (Desktop only)

Synchronization functionality is provided specifically for:

- Pocket PC devices running Windows Mobile 2003 or Windows Mobile 5.0
- Palm devices running Windows Mobile 5.0
- Laptops or desktops with Windows 2000 or Windows XP operating systems running Outlook 2000, Outlook 2002 (XP), Outlook 2003

Devices and Supported Functionality

Oracle Sales for Handhelds currently utilizes a blended model for providing enterprise data on handheld devices. Oracle Sales Synchronization provides enterprise information directly into Microsoft Outlook and Pocket PC devices. The Oracle Sales for Handhelds connected pages provide enterprise information via an HTML browser and OA framework. The following matrix discusses which devices can be used with the Oracle Sales for Handhelds functionality.

Device	Direct Synchronization	Connected Pages
Microsoft Pocket PC Devices (Windows Mobile CE, XScale or ARM Processors only)	Yes	Yes
Microsoft Smartphone Devices (Windows Mobile SE)	No	Yes
Palm OS (Blazer Browser)	No	Yes
Palm (Windows Mobile 5.0)	Yes	Yes
Nokia Communicator (Symbian OS with Opera browser support)	No	Yes

Device	Direct Synchronization	Connected Pages
Nokia Smartphone (Symbian OS without Opera browser)	No	No
RIM Blackberry (Blackberry Browser)	No	Yes

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

Alerts

Alerts can be sent in e-mails or by Short Message Service (SMS). In order to receive e-mails, salespeople must have their e-mail addresses set up correctly in Oracle Workflow. SMS is a feature available with some wireless phones that allow users to send or receive short alphanumeric messages typically up to 160 characters. With alerts, sales representatives can receive automatic information about critical business events, anytime, anywhere via SMS or e-mail.

Administrators can create customized alerts (see Extensibility for Alerts Using Oracle Workflow, page 7-3 for details on creating custom alerts.) Following are the seeded alerts:

- The application queries the transaction tables from Oracle Collections to determine delinquent customers. The alert advises the customer name, transaction number, and due date of the overdue invoice. The e-mail displays the transaction and customer details.

- Alerts for service contracts that are about to expire are created by a concurrent program in Oracle Service Contracts. A parameter sets the number of days before expiration within which expiring contracts are included. The alert includes the contract number, customer name, and expiration date. The e-mail includes contact and contract information.

- A service request that is newly escalated via Escalation Manager creates a newly escalated task with a related service request. Escalation Manager sends an alert that provides customer name, service request number, status, escalation level, and who the service request is assigned to. The e-mail includes customer contacts.

2

Dependencies and Integration Points

Mandatory Dependencies

The connected handheld browser requires Oracle Sales: See the *Oracle Sales Implementation Guide.*

The Microsoft Outlook Synchronization requires Oracle Sales: See the *Oracle Sales Implementation Guide.*

Oracle Sales for Handhelds requires the synchronization feature contained in Oracle Common Application Calendar. See the *Oracle Common Application Calendar Implementation Guide.*

Optional Integrations

Oracle Interaction History is required in order for Oracle Sales to show e-mail interactions that are captured in Desktop Outlook and synchronized with Oracle Sales.

The alerts feature requires the following integrations:

- Oracle Workflow is required for all alerts.
- Alerts for past due invoices and delinquent accounts require Oracle Collections.
- Alerts for expiring service contracts require Oracle Service Contracts.
- Alerts for escalated service requests require both Oracle Support and Escalation Manager (a feature in Oracle Common Application Calendar).

3

Common Implementation Steps

Set Up and Synchronize Employees

Set up users in Oracle Human Resources. If an employee requires the ability to track e-mail interactions through synchronizing with Outlook, be sure to enter the employee's e-mail address under Office Details in Oracle HR before running the Synchronize Employees concurrent program.

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

Data Quality Management Setup

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

Steps:

1. Set the profile option *HZ: Enable DQM Party Search* to Yes.

2. Use the Trading Community Manager responsibility to run the concurrent program *DQM Staging Program* to create the staged schema and intermedia index.

3. Use the Trading Community Manager responsibility to schedule the concurrent program *DQM Synchronization Program*on a short interval. This program synchronizes the new data coming into the system.

4. Use the Trading Community Manager responsibility to schedule the concurrent program *DQM Index Optimization Program* on a regular interval, such as daily.

5. Use the Trading Community Manager responsibility to run the concurrent program *DQM Compile All Rules* to compile all the defined match rules.

6. Set the following profile options with appropriate matching rules for customer and contact search:

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

Appointment Preferences

Responsibility: Sales User

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

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

Seeded Roles and Responsibilities

The following responsibilities are shipped with Oracle Sales for Handhelds:

- Wireless Sales User
- Wireless Sales Administrator

Custom responsibilities can be setup using standard eBusiness suite functionality.

4

Implementation Steps for the Connected Browser Functionality

Setting Up Sales for Handhelds Profile Options

Setting the following profile options is not mandatory:

- **ASP: Calendar date range**

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

  Default: 3

  Profile Category: UI

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

  This profile determines the number of characters to be displayed in tables on the handheld device, after which the data is truncated.

  Default: 35

  Profile Category: UI

Customizing Action Lists

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

Page Name	Lookup Type
Appointment Details Page	ASP_APT_DET_PG_NAV

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

Personalizing the User Interface

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

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

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

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

Example

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

- Hide or show regions, fields, and entire tables
- Change the order of regions and fields on a page

- Change field labels and region headers
- Make fields mandatory
- Make fields read-only
- Use cascading style sheets
- Define default values
- Provide tip text
- Add fields to a region

5

Implementation Steps for Outlook Synchronization Functionality

Setting Mandatory Profile Options

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

- **CAC Sync: Contact Sync Mode**

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

  Level: Site and application

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

  Category: Calendar - Synchronization or Security

- **CAC Sync: Include Details**

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

  Level: Application, Site, Responsibility, and User

  Default: Yes for application level for Oracle Sales for Handhelds

  Category: Calendar - Synchronization or Security

- **CAC Sync: Include Links**

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

  Level: Application, Site, User

Default: Yes for application level for Oracle Sales for Handhelds

Category: Calendar - Synchronization or Security

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

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

  Level: Site, Application, Responsibility, and User

  Default: Yes at site level, No at application level for Oracle Sales for Handhelds

  Category: Calendar - Synchronization or Synchronization

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

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

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

  Level: Application

  Default: None

  Category: Calendar - Synchronization or Security

The profile option Task Manager: Default Task Type is already set to work correctly with synchronization. Please do not change the setting.

Setting Optional Profile Options

You can change the following profile options.

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

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

  Level: Site

  Default: 200

  Category: Calendar - Synchronization or Synchronization

- **CAC Sync: Appointments Category**

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

Level: Site

Default: Oracle Appointments

Category: Calendar - Synchronization or Synchronization

- **CAC Sync: Contacts Category**

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

  Level: Site

  Default: Oracle Contacts

  Category: Calendar - Synchronization or Synchronization

- **CAC Sync: Tasks Category**

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

  Level: Site

  Default: Oracle Tasks

  Category: Calendar - Synchronization or Synchronization

- **CAC Sync: Conflict Category**

  This is the category that stores duplicate information when there are conflicts during synchronization.

  Level: Site

  Default: Oracle Conflicts

  Category: Calendar - Synchronization or Synchronization

- **CAC Sync: Days Before**

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

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

  Default: 14

Category: Calendar - Synchronization or Synchronization

- **ASP: Email Address Domain Name**

  This profile options stores the e-mail address domain name. The application will use this domain name to route e-mails if it uses MS Exchange Server.

  Level: Site

  Default: Null

  Category: E-mail interaction.

- **ASP: Email Interaction: Flagged Category**

  This is the category name for e-mails that are marked in Desktop Outlook to be added to interaction history in Oracle Sales when synchronized. If you change this category, then users must perform a full synchronization to update their clients.

  Level: Site

  Default: Marked for Logging

  Category: Email Interaction

- **ASP: Email Interaction: Recorded Category**

  This is the category name for e-mails that were successfully synchronized from Desktop Outlook to be added to interaction history in Oracle Sales. If you change this category, then users must perform a full synchronization to update their clients.

  Level: Site

  Default: Logged in Oracle

  Category: Email Interaction

Concurrent Programs

Purge Synchronization Data Concurrent Program

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

After you run the CAC SYNC Purge/Cleanup concurrent request, then the 'SYNCML' error will not appear in Microsoft Outlook while synchronizing data from Outlook 2007 to server.

Deleting Invalid Contacts Concurrent Program

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

1. The contacts in the download list are active contacts

2. The user is a member of the customer sales team

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

Enabling Outlook Preferences Menu

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

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

Attributes Mapping for Outlook Synchronization

The following sections describe the mapping between attributes in Pocket Outlook/Outlook and Oracle eBusiness Suite. The mappings apply to Oracle Sales for Handhelds and Oracle Sales.

Appointment Attribute Mapping

The following table describes the appointment attribute mapping between Outlook/Pocket Outlook and Oracle eBusiness Suite.

Pocket Outlook Field	Pocket Outlook Value	Outlook Field	Outlook Value	eBusiness Field	eBusiness Value
Subject	Freeform Text (carriage return is supported)/ 4096 characters	Subject	Freeform Text	Subject	Freeform Text / 80
Location	Freeform Text/ 1023 characters	Location	Freeform Text	Location	Free form Text/100
Starts	Time/Date Field	Start Time	Time/Date Field	Time/Date	Time/Date Field

Pocket Outlook Field	Pocket Outlook Value	Outlook Field	Outlook Value	eBusiness Field	eBusiness Value
Ends	Time/Date Field	End Time	Time/Date Field		
				Duration	Number of minutes/hours or All Day
All Day	Yes/No	All Day Event	Check Box	All Day	
Occurs	User defined	Recurrence	User defined	Repeating (with exclusions)	User defined
Reminder	None/Remind Me	Reminder	Check Box	Reminder	Do not remind me/number minutes/hours/days
Attendees	Multi-select LOV of contacts	Attendees	Multi-select LOV of contacts	Attendees	Multi-select LOV of employees
Status	Free/Tentative/Busy/Out of Office	Show Time As	Free/Tentative/Busy/Out of Office	Show Time As	Busy/Free
Sensitivity	Normal/Private	Private	Check Box	Access	Publish/ Private/ Internal
Body	Freeform Text/ 20 KB	Body	Freeform Text	Description	Freeform Text / 4000

Note: If Property Manager is installed, then the location can be either freeform text or a Pick list. If the user creates the appointment using a property manager location and later updates the location via outlook, then the location will not be updated in Oracle eBusiness Suite during subsequent synchronizations. The property manager location will remain in Oracle eBusiness Suite.

Task Attribute Mapping

The following table describes the task attribute mapping between Outlook/Pocket Outlook and Oracle eBusiness Suite.

Pocket Outlook Field	Pocket Outlook Value	Outlook Field	Outlook Value	eBusiness Field	eBusiness Value
Subject	Freeform Text/ 4095 characters	Subject	Freeform Text	Subject	Freeform Text/ 80
Priority	High/Normal /Low	Priority	High, Normal, Low	Priority	Drop down (with number values)
Status	Not Complete/ Completed	Status	Not started, In progress, Waiting on someone else, Deferred	Status	Drop Down
Starts	Date picker	Start Date	Date picker		
Due	Date picker	Due Date	Date picker	Due Date	Date picker
Sensitivity	Normal/Private	Private	Check box	Visibility	Internal Only/ Private/ Public
Body	Freeform text/ 60 KB	Body	Freeform text	Description	Freeform Text/ 4000

Note: Status: Updating completed flag in Outlook should update the assignee status on the server to completed. Complete = Completed; On Hold = Deferred; Not Started = Not Started; In progress = In Progress; Interrupted = Waiting on someone else; User defined/Other = Matched based on the flag on the server.

Task Status Attribute Mapping

The following table provides task status mapping when tasks are downloaded from Oracle eBusiness Suite to Outlook.

Task Status in eBusiness Suite	Task Status in Outlook	Notes
Not Started	Not Started	
In Progress	In Progress	
Assigned	Not Started	
Working	In Progress	
Schedulable	Not Started	
Accepted	In Progress	
Interrupted	Waiting on Someone Else	
On Hold	Deferred	
Completed	Completed	Supported for Pocket PC
Closed	Completed	Supported for Pocket PC

The following table provides task status mapping when tasks are uploaded to Oracle eBusiness Suite from Outlook/Pocket Outlook.

Task Status in Outlook	Task Status in eBusiness Suite
Not Started	Not Started
In Progress	In Progress
Deferred	On Hold
Waiting on Someone Else	Interrupted
Completed	Completed

Task Priority Attribute Mapping

The following table provides task priority mapping when tasks are downloaded from Oracle eBusiness Suite to Outlook/Pocket Outlook.

eBusniess Suite Value	Pocket Outlook / Outlook
1	High
2	High
3	High
0	Normal
4	Normal
5	Normal
6	Normal
7	Low
9	Low
8	Normal

Note: Priority 8: Special internal use by Oracle (Non-Prioritized)

The following table provides task priority mapping when tasks are uploaded to Oracle eBusiness Suite from Outlook/Pocket Outlook.

Pocket Outlook / Outlook	eBusniess Suite Value
High	1
Normal	5
Low	9

Contact Attribute Mapping

The following table describes the contact attribute mapping between Outlook/Pocket Outlook and Oracle eBusiness Suite.

Pocket Outlook Field	Pocket Outlook Value	Outlook Field	Outlook Value	eBusiness Field	eBusiness Value
Name	Freeform text (combines title, first, middle, last, suffix)	Name	Freeform text (title, first, middle, last, suffix)	Name	Party Name / 360
Title	Freeform text/ 1023 characters	Title	Freeform text	Prefix	Drop down / 30
First	Freeform text/ 1023 characters	First	Freeform text	First Name	Freeform Text / 150
Middle	Freeform text/ 1023 characters	Middle	Freeform text	Middle Name	Freeform Text / 60
Last	Freeform text/ 1023 characters	Last	Freeform text	Last Name	Freeform Text / 150
Suffix	Freeform text/ 1023 characters	Suffix	Freeform text	Suffix	Freeform Text / 30
Job Title	Freeform text/ 1023 characters	Job Title	Freeform text	Job Title	Freeform text / 100
Department	Freeform text/ 1023 characters	Department	Freeform text	Department	Freeform text / 60

Pocket Outlook Field	Pocket Outlook Value	Outlook Field	Outlook Value	eBusiness Field	eBusiness Value
Company	Freeform text/ 1023 characters	Company	Freeform text	Customer	Freeform Text / 360
Work Tel	Phone format/ 1023 characters	Business	Freeform text	Phone Number	Type = Telephone, Purpose = Business / 60
Work Fax	Phone format/ 1023 characters	Business Fax	Freeform text	Phone Number	Type = Fax, Purpose = Business / 60
Mobile Tel	Phone format/ 1023 characters	Mobile	Freeform text	Phone Number	Type = Mobile, Purpose = Business / 60
Home Tel	Phone format/ 1023 characters	Home	Freeform Text	Phone Number	Type = Telephone, Purpose = Personal / 60
Pager	Pagerformat/ 1023 characters	Phone	Freeform Text	Phone Number	Type = Pager, Purpose = Business / 60
Work address	Freeform text/ 1023 characters (street, city, state, postal code, country)	Business Address	Freeform text	Address	Address 1 - 4/ 240 each city, state, county, country, postal code / 60 each (purpose " Business")
Email (no HTML)	Freeform text/ 1023 characters	Email1	Freeform text	Email	Freeform text / 2000

6

Implementing the Clients

Downloading and Installing the Pocket PC Synchronization Client

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

Prerequisites

❒ You need the Wireless Sales User responsibility

Steps:

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

   The client loads and installs automatically in your Pocket PC.

Restrictions

When the server version of the synchronization software is upgraded to a new version, (for example, from version 1.0 to 2.0) all users need to download the new version in order to remain compatible with the server and be able to perform synchronizations. Changes in build number do not cause incompatibility.

Downloading and Installing the Desktop Outlook Synchronization Client

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

To initialize custom category:

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

1. In Outlook select Edit > Categories from the menu .
2. Click **Master Category List**.
3. Add a new Category called `Outlook Category`.
4. Click **Add.**
5. Click **OK**.
6. Click **Master Category List**.
7. Select Outlook Category from the list.
8. Click **Delete**.
9. Click **OK**.
10. Click **OK**.

Installation Steps:

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

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

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

Restrictions

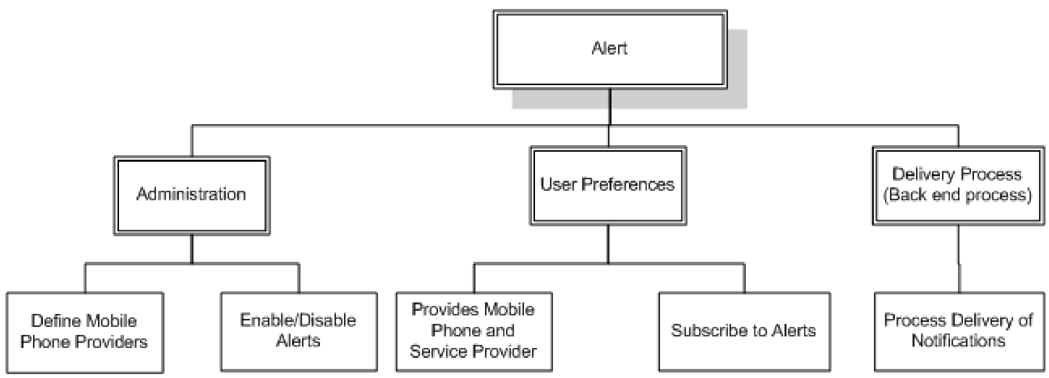
When the server version of the synchronization software is upgraded to a new version, (for example, from version 1.0 to 2.0) all users need to download the new version in order to remain compatible with the server and be able to perform synchronizations. Changes in build number do not cause incompatibility.

7

Implementing Alerts

Implementing Alerts Overview

The following diagram depicts the components of the alert feature.



The alert feature consists of the following functions:

- **Administration:** The sales administrator is responsible for defining the mobile phone service provider information so that sales representatives' mobile phone profiles can be captured in the application.

  Depending on your implementation, sales administrators can define new alerts or enable and disable existing alerts.

- **User Preferences:** Using the Sales Alerts interface, users can subscribe to alerts related to different business objects within the eBusiness suite application. Each alert subscription can have a delivery method (e-mail or SMS or both).

- **Delivery Process:** The delivery process is a back-end process that delivers the alert (e-mail and SMS) to the user. The alert delivery process is accomplished by reading the user preferences. Though the alert delivery process does not have a user interface, it is an important functional module of the alert feature.

Enabling Outlook Preference Menu

This menu contains the functions for setting up the contact list and downloading clients. Add the submenu, ASP: Sales Alerts Preferences Container Menu, for Oracle Synchronization, to the ASN menu ASN_HOME_MENU.

Lookup Types for Alerts

There are two extensible lookup types for implementing Alerts:

- **Lookup Type: ASP: Alert: Service Providers**

  Description: Carrier names for sending SMS alerts

  Type: User

  This lookup provides the Service Provider selection list used by individual users when they set their preferences for receiving alerts. No data is seeded for this lookup, therefore you must set up the service providers used by your sales representatives.

  Example

  Following are some commonly used service providers with the lookup values and descriptions:

Lookup	Description
mobile.mycingular.com	Cingular
messaging.sprintpcs.com	Sprint
vtext.com	Verizon
tmomail.com	T-Mobile
messaging.nextel.com	Nextel

- **Lookup Type: ASP: Alert List**

  Description: Sales events for which alerts can be created

  Type: User

  The following sales events are seeded in the application. The implementer or administrator can add custom alerts.

Lookup	Description
Blanket Sales Agreement	Expiration of Blanket Sales Agreement for my customers
Invoices	Invoices that are past due date for my customers
Service Contract	Expiration of Service Contracts for my customers
Service Request	Escalation of Service Requests for my customers

Concurrent Programs for Alerts

Concurrent programs generate two sales alerts, delinquent customers and expiring service contracts. Set these concurrent programs to run periodically. The concurrent program set name is ASP: Sales Alerts Program Set. The description is: Program set for concurrent programs related to sales alerts. It is available from the Sales Administrator responsibility. The program set contains two concurrent programs:

- ASP: Expiring Service Contracts uses the input parameter Number of Days.

  The alert is sent X days before the service contract expires to the sales representatives who are on the sales team for the customer.

- ASP: Overdue Invoice

  Alerts are sent to the sales representatives who are on the sales team for the delinquent customer. Delinquency is determined by overdue invoice, payment amount discrepancy, or dispute.

  The Workflow Background Process concurrent program must be run in order for users to receive their e-mail alerts. The parameter Item Type needs to the set to ASP Alerts Manager if it is being run only for ASP. See Oracle Workflow documentation for more information.

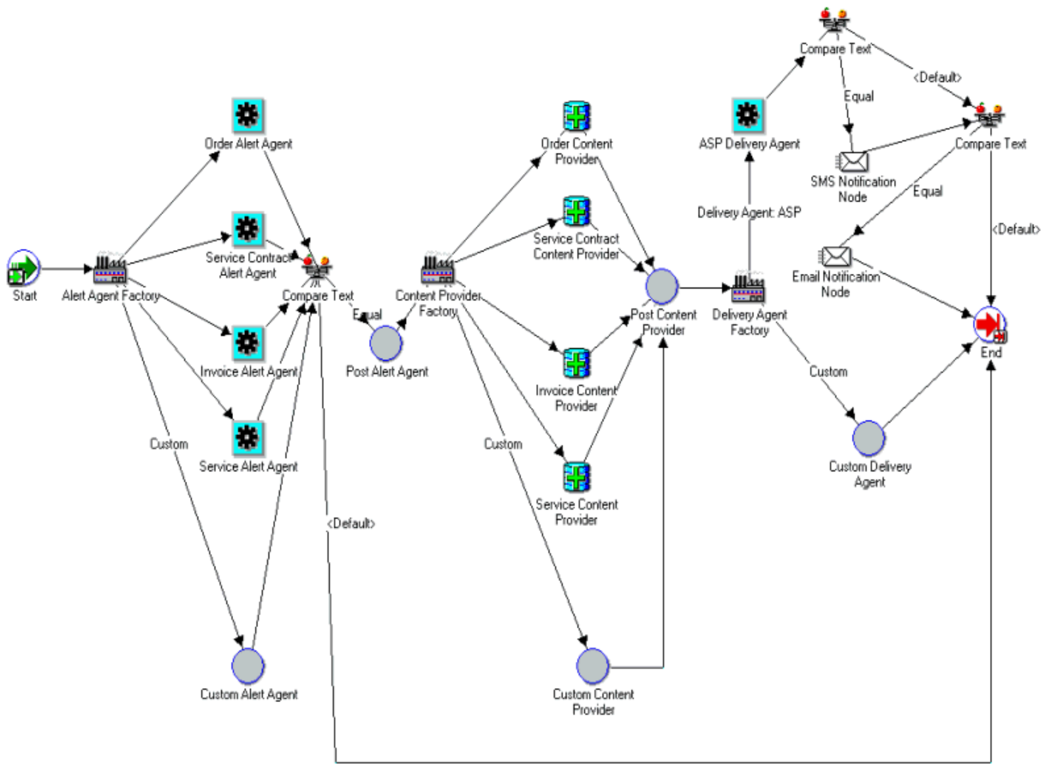
Extensibility for Alerts Using Oracle Workflow

Oracle Workflow automates and streamlines business processes both within and beyond your enterprise, supporting traditional applications based workflow as well as e –business integration workflow. Oracle Workflow lets you include your own PL/SQL procedures or external functions as activities in your workflows. Without modifying your application code, you can have your own program run whenever the Workflow Engine detects that your program's prerequisites are satisfied.

See the *Oracle Workflow Developer's Guide* for information on how to utilize the extensibility of Oracle Workflow.

The following diagram illustrates various sales alerts workflow nodes associated with the implementation of the alert feature.

Workflow Manager Process Flow Diagram for Sales Alerts System



There are several components of the Sales Alerts System that are extensible. You can modify any step for seeded alerts by replacing shipped nodes with customer nodes. You can also support for entirely new alerts by adding custom nodes for each step of the process.

Subscription Program

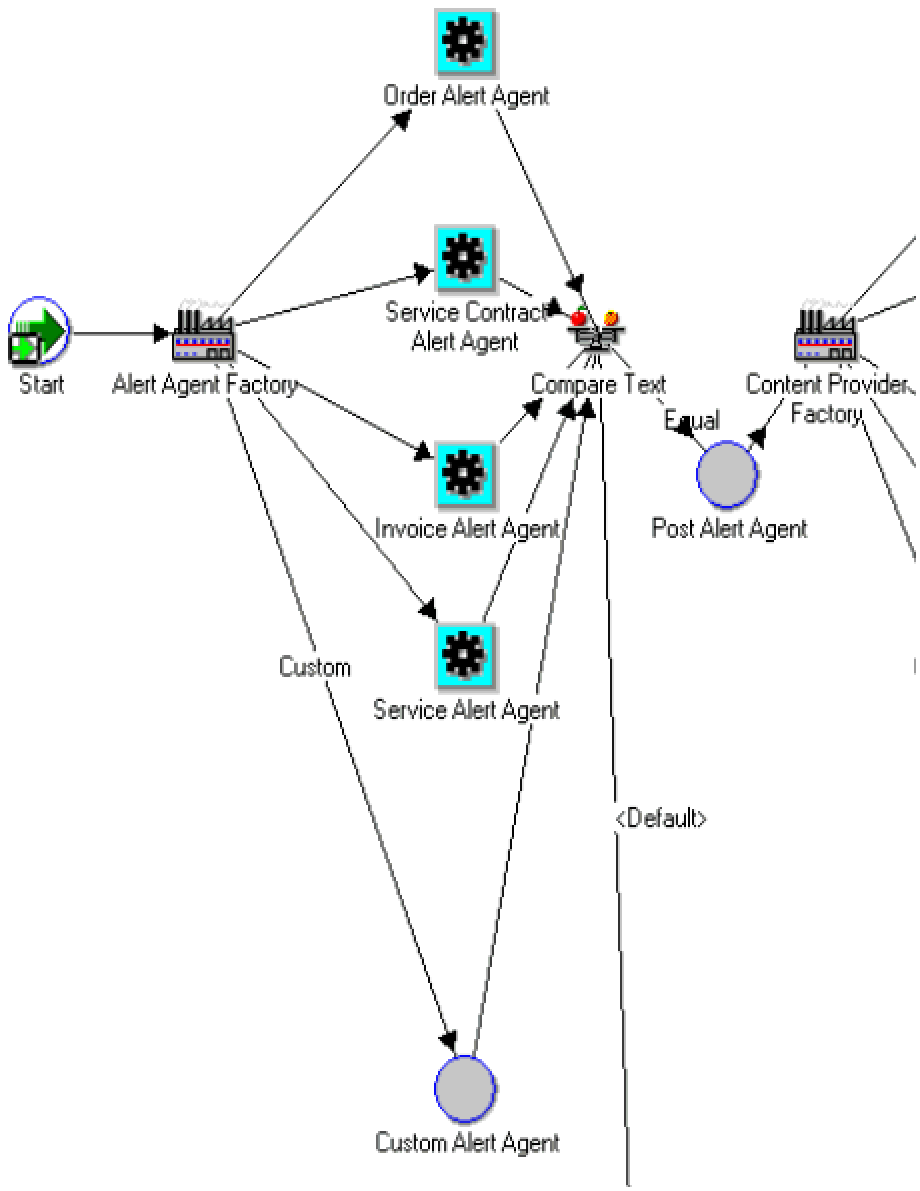
The start point of the diagram is where concurrent programs or business events invoke the workflow process. The Business Event System dispatches raised business events to the Sales Alerts System Subscription. One subscription function, ASP_ALERTS_SUBS.Initiate_Alerts, is shipped to support the alerts system. This function calls the Sales Alerts Workflow Process (ASP_ALERT_PROCESS) with the necessary parameters. You can extend this subscription function with the following parameters:

- ALERT_NAME: Name of the business event that the subscription is attached with
- ALERT_SOURCE_OBJECT_CODE: Should be 'CUSTOM'
- Other Parameters: All other parameters that are part of the event that was raised.

Custom Alert Agent Function Node

If an event is raised that is not supported by the shipped Alerts function, then the Custom Alert Agent node is called for the event. This node is totally customizable and is attached to the function ASP_ALERT_ENGINE.NOOP by default.

Process Flow Diagram Including Custom Alert Agent Function Node



Notes on Customizing the Custom Alert Agent Function

- The ASP_ALERT_SUBSCRIPTIONS table is used for storing the subscription information of the custom alert. The Alert Preferences user interface stores the user's preferences in this table. You do not make changes to the table.
- Use the public function ASP_ALERTS_PUB.Get_Matching_Subscriptions for getting the matched subscriptions for the custom alert.
- If there is at least one subscription for the custom alert, then the item attribute

FOUND_SUBS must be set to YES.

- If there is at least one subscription for SMS or EMAIL, then the item attributes FOUND_SMS_SUBS and FOUND_EMAIL_SUBS must be set to YES.
- The item attributes SMS_USERS and EMAIL_USERS must be set to the comma separated values of the SUBSCRIBER_NAME of the SMS or EMAIL subscriptions to the custom alert.
- In the customized Post Alert Agent Function node the item attribute USE_CUSTOM_CONTENT_AGENT must be set to YES. This node can be used for alerting additional users.

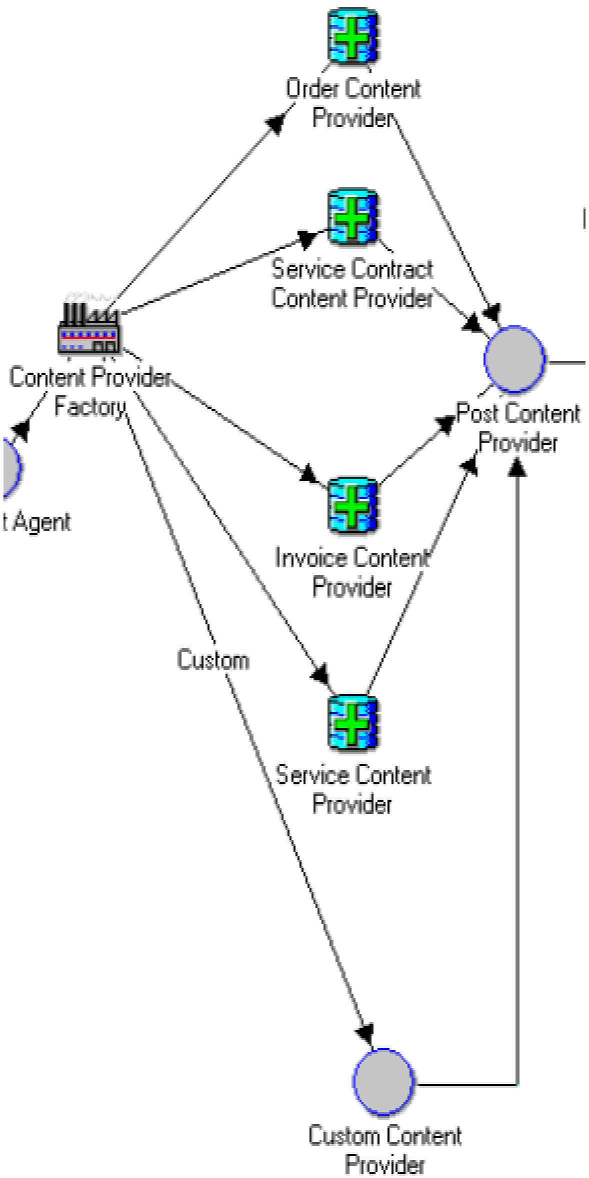
Notes on Post Alert Agent Function

- The additional users to be alerted must be added as a comma separated list to the existing item attributes SMS_USERS and EMAIL_USERS.

Custom Content Provider Function Node

The Custom Content Provider node is called if an event is raised that is not supported by the shipped Alerts function, or if the item attribute USE_CUSTOM_CONTENT_AGENT is set to YES. This node is totally customizable and is attached to the function ASP_ALERT_ENGINE.NOOP by default.

Process Flow Diagram Including Custom Content Provider Function Node



Notes on Customizing SMS Content

- Define a new FND Message for SMS content and set the tokens appropriately.
- Set the item attribute SMS_TEXT value to the FND message content.

Notes on Customizing E-mail Content

- Define a new FND Message for EMAIL Subject and set the tokens appropriately.
- Set the item attribute EMAIL_SUB_TEXT value to the FND message content.

- For e-mail content, the OA Framework Region is used in the Message Delivery Node. Set the item attribute EMAIL_CONTENT value to the OA Framework Region Function Name.

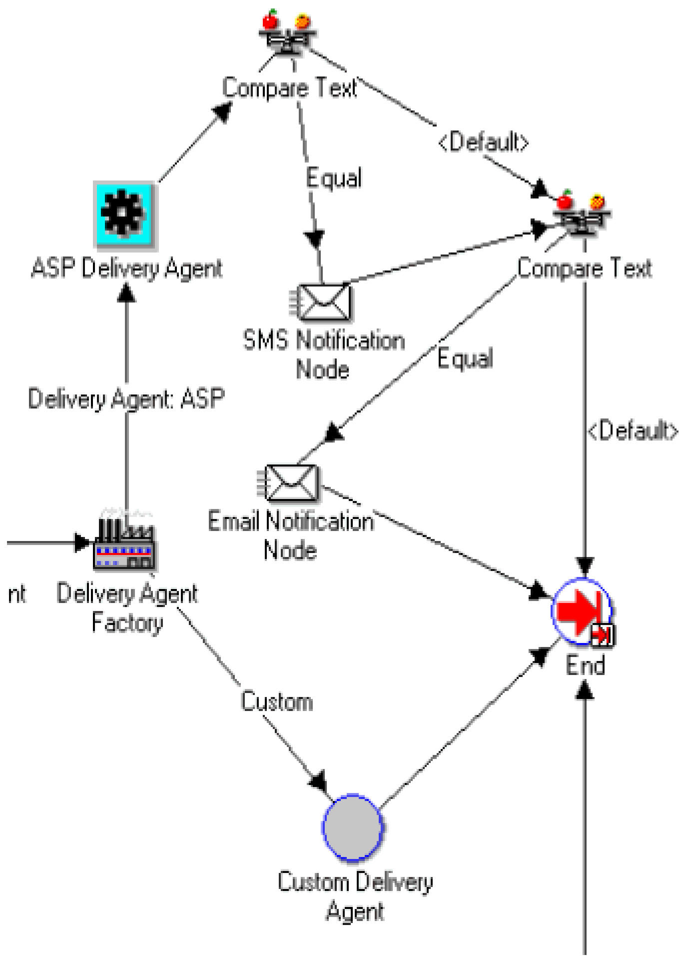
  Example
  ```
  'JSP:/OA_HTML/OA.jsp?OAFunc=ASP_WF_ORDER_MSG_RN=-'
  ```

- Post Content Provider Function Node: If a custom delivery solution is avvailable for sending SMS or e-mail, then the item attribute USE_CUSTOM_DELIVERY_AGENT must be set to YES.

Notification Mailer Node: Custom Delivery Agent

The Custom Delivery Agent node is called if the item attribute USE_CUSTOM_DELIVERY_AGENT is set to YES. This node is totally customizable and is attached to the function ASP_ALERT_ENGINE.NOOP by default. You can change this function to your own function for the custom delivery solution. You can use the shipped delivery agent for your custom alerts.

Process Flow Diagram Including Custom Delivery Agent



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Troubleshooting

Checking Synchronization Server Status

You can verify that the synchronization server is running by entering a URL into your browser. If the server is operating, the synchronization version number appears in your browser.

The web page URL is the same as the URL the synchronization client uses to connect to the synchronization server. You can construct the URL by postfixing the following path after http(s)://[server]:[port]/

/OA_HTML/SyncServlet

Example

https://ap1001rt.us.oracle.com:7777/OA_HTML/SyncServlet

Diagnostic Logs

The synchronization uses Oracle Applications Framework standard logging, which means the synchronization logs can be viewed via standard Oracle logging UIs such as Oracle Enterprise Manager. Use the following parameters to enable CACSync diagnostic logging:

Application Name = CRM Foundation

Module: %cac.sync%

Level: Exception

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