

**Oracle® Sales for Handhelds**

User Guide

Release 12.2

**Part No. E49033-01**

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Oracle Sales for Handhelds User Guide, Release 12.2

Part No. E49033-01

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# Send Us Your Comments

## **Oracle Sales for Handhelds User Guide, Release 12.2**

### **Part No. E49033-01**

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- 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?
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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](http://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 12.2 of the *Oracle Sales for Handhelds User Guide*.

This document is intended for Sales for Handhelds users.

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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Structure

1 Using Oracle Sales for Handhelds

## 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.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

## 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 User Guide**

Oracle Common Application Calendar enables you to manage daily tasks and appointments, create and maintain notes, and schedule resources. It provides a central place to store and view resource schedules, utilization, and availability. It also enables you to synchronize your calendar with external calendars such as Microsoft Outlook or handheld devices.

### **Oracle Sales for Handhelds Implementation Guide**

This guide describes how to set up Data Quality Management to manage customers, set appointment preferences of timezone and categories, and map appointment, task, and contact on your handheld device with Oracle E-Business Suite. You can implement clients to synchronize your handheld with Oracle Sales and Microsoft Desktop Outlook and subscribe to Short Message Service alerts.

### **Oracle Sales User Guide**

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar 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 Channel Revenue Management, Oracle Partner Management, and Oracle Incentive Compensation.

## **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 E-Business Suite data.

## **Oracle E-Business Suite Concepts**

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, 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 12.2, or as part of an upgrade to Release 12.2.

## **Oracle E-Business Suite Maintenance Guide**

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

## **Oracle E-Business Suite Security Guide**

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

## **Oracle E-Business Suite Setup Guide**

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

## **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 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-Business Suite 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 operating 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 e-Commerce Gateway Implementation Guide**

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 Hub Implementation Guide**

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

## **Oracle Product Hub User's Guide**

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

## **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.





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# Using Oracle Sales for Handhelds

This chapter covers the following topics:

- Overview of Oracle Sales for Handhelds
- Browser Based Application
- Oracle Sales Synchronization
- Downloading and Installing the Pocket PC Synchronization Client
- Downloading and Installing the Desktop Outlook Synchronization Client
- Overview of Business User Flows
- Contacts in Outlook or Pocket PC
- Appointments in Outlook or Pocket PC
- Tasks in Outlook or Pocket PC
- E-Mail Interactions with Desktop Outlook
- Synchronization Preferences
- Subscribing to Alerts
- Synchronizing Pocket PC
- Synchronizing Desktop Outlook
- Usage Scenarios for Handheld Devices
- Devices and Supported Functionality

## Overview of Oracle Sales for Handhelds

Oracle Sales for Handhelds is an enterprise application for traveling sales professionals that simplifies and optimizes the task of planning and managing the sales process. Oracle Sales for Handhelds simplifies the sales process by providing visibility into key sales cycle activities helping sales professionals plan and manage effective selling activities. It is fully integrated in the E-Business Suite and complements the online and

disconnected editions of the Oracle Sales application.

## Key Features

Oracle Sales for Handhelds has the following key features:

- The application uses the HTML browser available on the handheld device to provide real-time access to enterprise information.
- Users can leverage familiar native Personal Information Management (PIM) applications available on handheld devices to manage appointments, contacts, and tasks.
- The application provides contextual hyperlinks within the note section of appointments and contacts that provides a conduit to real-time enterprise information.
- The application is integrated with Microsoft Outlook.
- An Alerts feature sends information about critical business events via Short Message Service (SMS) or e-mail.

## Browser Based Application

Oracle Sales for Handhelds provides real time access to enterprise information via a connected browser on a wireless handheld device.

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
- Palm based devices running Windows Mobile 5.0
- Nokia running Internet Browser for HTML 4.01/xHTML on Symbian 7.OS operating system
- Blackberry devices version 4.0 or higher running native HTML browser

## Accessing Oracle Sales Via Connected Handheld Browser

Users can log into the Oracle Sales application using the browser in their handheld devices. Links in the Notes section of Contacts and Appointments in Pocket PC also open related Oracle Sales pages.

You need the Wireless Sales User responsibility

**Steps:**

1. Open the web browser 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 for Handhelds.

## **Customer Management Features**

The connected handheld browser provides the following features for customer management:

- Search customers
- View customer information
- Create and update information associated with customers such as notes and tasks.

## **Contact Management Features**

The connected handheld browser provides the following features for contact management:

- Search contacts
- View, update, and create contact information
- Create and update information associated with contacts such as notes, tasks, and appointments

## **Opportunity Management Features**

The connected handheld browser provides the following features for opportunity management:

- Search for opportunities
- View the list of opportunities closing within the current forecast period defined for the user including all opportunities owned by the user across all operating units the user has access to
- Navigate to opportunity details
- View opportunities and opportunity related information associated with customers and contacts

- Add and update products or product categories for an opportunity. The Add Product page includes list price and operating unit information.
- Create and update information associated with opportunities, such as notes, tasks, and appointments
- Add opportunity contacts

## Appointment Wrap-Up

A customer visit may result in follow-up actions such as a new appointment, creating a note or task against the customer, or even updating the opportunity. Depending on the appointment context, the following actions can be enabled for users:

- Create a follow-up appointment for the customer or contact
- Create a note for the customer, contact, or opportunity that is associated with the appointment
- Create a task
- Update key opportunity details, such as status or probability

## Appointments and Task Management

Sales representatives synchronizing with the enterprise application can get their appointments and tasks into Outlook. However, for non-Outlook users, the Oracle Sales for Handhelds also provides real-time information about schedules via connected handheld browser. The following functionality allows users to manage their schedules online:

- Create and edit appointments and tasks
- View the schedule (appointments) and tasks
- Wrap up appointments

## 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

## 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.

## Overview of Business User Flows

The following sample business scenarios describe salespeople using Oracle Sales for Handhelds in different situations. The steps include the behavior of the application for different types of information upon synchronizing.

## Contacts in Outlook or Pocket PC

### Scenario:

1. As a Sales User, sales representative Jerry Weinberg logs into Oracle Sales to prepare his list of contacts for his trip next week.
2. Jerry navigates to Preferences, Outlook Synchronization, Contacts and reviews his current list of contacts to synchronize. He removes the contacts he doesn't need for the trip. Then he searches and adds the contacts he will be visiting as well as those he may speak to by phone during the week. Only address information that is selected as the Identifying address will synchronize.
3. While Jerry is meeting with Tom Watkins at Business World, Tom mentions that his title has changed to VP. Jerry updates his Pocket PC with the new job title.
4. Jerry synchronizes and checks his log. There is an error for his change to Tom Watkins contact information because today someone else changed the fax number for the same contact. His change is replaced with the one on the server. (His preference is set to Server Wins - Replace Client Data.) Jerry changes the title and synchronizes again.
5. Tom introduces Jerry to a new contact at Business World, Jack Black. Jack gives him his business card and Jerry adds the contact information into his Pocket PC and assigns him the synchronization category (for example, *Oracle Contacts*).

**Note:** This is the only category that should be assigned to the contact. If additional categories are assigned, then the contact will not synchronize.

6. Jerry synchronizes. During synchronization, new contacts are sent to Oracle

Trading Community Architecture and checked for duplicates using Data Quality Management. Jerry checks his log. Jack Black's organization already exists and DQM found no potential duplicates for Jack Black, therefore there is no error in the log and Jack Black is added as a contact in the enterprise.

7. That evening Jerry opens contact information for Jane Bond in his Pocket PC and in the Notes he selects the link to view contact detail information in Oracle Sales. His browser window opens, and after logging in, he views the associated opportunities and notes online while making his call.
8. Jerry determines he doesn't need to call Jane again for six months. He deletes the contact from his Pocket PC. He synchronizes and the contact is removed from his list of contacts to synchronize.

## Restrictions

If you change the customer name in your client, then the change will not be applied to the enterprise application data. The next time the record is synchronized, the customer name in the enterprise data will overwrite the value in Outlook.

The resolution of conflicts depends upon your setting in Outlook Synchronization: Preferences.

## Related Topics

*Oracle Trading Community Architecture User Guide*

## Appointments in Outlook or Pocket PC

When you create, update, or delete appointment in Outlook or Pocket PC and then synchronize, your changes are reflected in your Oracle Calendar. Also, Oracle Calendar appointments or invitations appear in your Outlook or Pocket PC.

### Notes

- **Category:** Oracle appointments created in Outlook or Pocket PC must be assigned the synchronization category (Oracle Appointments) to make appointment details available in the Oracle Sales Calendar.
- **Invitation:** The word indicates an invitation to an appointment created by someone else. To accept the appointment, remove the word *Invite* and synchronize.
- **Personal Appointments:** Non-Oracle appointments created in Outlook or Pocket PC appear in the Oracle Calendar as read-only appointments with the notation "This is a Non-Oracle Appointment" followed by the appointment name.
- **Recurring Personal Appointments:** Recurring non-Oracle appointments created in



Outlook or Pocket PC create recurring appointments for a maximum of five years in the Oracle Calendar after synchronization.

- **Time Zone:** Appointments and repeating appointments created in Outlook or Pocket PC synchronize time zone information with the server. The time zone is converted to saved in the server time zone. When synchronized, the appointment in Outlook and Pocket PC is converted to the individual user's time zones.

### Scenario:

1. Customer Tom Watkins from Business World calls to request a demonstration. He talks to sales agent Jerry Weinberg. Using Oracle Sales, Jerry creates an appointment for Thursday at 2:00, adds attendees, and associates the related opportunity. He also assigns the synchronization category (for example, *Oracle Appointments*).  

**Note:** This is the only category that should be assigned to the appointment for the appointment details to display in the Oracle Sales Calendar. If a different category is used, then the appointment displays as a Time Booking in the Oracle Sales Calendar after synchronization.
2. Jerry then synchronizes his Pocket PC. In the calendar, he sees the appointment he created in Oracle Sales and another appointment with the word *Invite* in the subject line. The appointment was set up by product specialist John Smith for Thursday at 1:00. In the appointment notes, he sees that the appointment is for discussing the upcoming demo. He sees the list of attendees as well as information about the opportunity and Business World.
3. In his Pocket PC, Jerry removes the word *Invite* from the subject line to accept John's appointment.
4. Jerry then realizes that he has a dentist appointment Thursday at 2:00. In his Pocket PC, he creates a personal appointment from 2:00 to 4:00 on Thursday. He then updates his original demonstration appointment with Tom Watkins to occur on Friday at 10:00.
5. Jerry then synchronizes his Pocket PC. After synchronization, Jerry's Oracle Sales calendar shows that he accepted John's appointment, moved the original demonstration appointment, and has a "Non-Oracle Appointment Dentist."
6. Friday morning, Jerry synchronizes his Pocket PC to make sure his calendar is up to date with the latest information in Oracle Sales. He wants additional information concerning the 10:00 meeting. In the appointment notes, he sees several links to Oracle Sales.

7. Jerry taps each link on his Pocket PC causing it to open the web browser. After logging into Oracle Sales, Jerry accesses real-time detailed information about Tom Watkins, Business World, and the opportunity.
8. The meeting goes well, and Jerry wants to close out the appointment. In his Pocket PC, he taps the Appointment Wrap-Up link in the Notes section of the appointment. This opens Oracle Sales in the web browser to a page that allows Jerry to add notes, set up a follow-up task, set up a follow-up appointment, and update the opportunity.
9. Jerry then synchronizes his Pocket PC. The follow-up appointment and task now appear on his Pocket PC.

## Restrictions

Repeating appointments with more than 1 year between appointments do not synchronize from the server.

Appointments can repeat up to 99 weeks on the client.

Outlook does not support more than one repeating appointment in a month.

The resolution of conflicts depends upon your setting in Outlook Synchronization: Preferences.

## Tasks in Outlook or Pocket PC

### Scenario:

1. Jerry Weinberg's manager assigns a task to both Jerry and John Smith to write a report about their visit to Business World. The task is created using Oracle Sales and is associated to the contact at Business World and assigned to John and Jerry.
2. Jerry and John both synchronize their Pocket PCs in the morning and see their task. Both update the status of the task and add to the description using their remote devices. John synchronizes at 1:00. When Jerry synchronizes at 2:00 his task on his device is updated with John's information and his own updates are placed in the Oracle Conflicts category. He updates the task with his information and synchronizes again.
3. During a meeting with Tom at Business World, Jerry agrees to have technical specialist Harvey Mathers call Tom. He enters this as a task in his Pocket PC, assigns the synchronization category (for example, *Oracle Tasks*), and synchronizes.

**Note:** This is the only category that should be assigned to the task. If additional categories are assigned, then the task will not

synchronize.

4. Back in the office, Jerry goes to the task summary in Oracle Sales using his laptop and associates the task to Tom at Business World and assigns the task to Harvey Mathers. (Associations and assignments cannot be done on the wireless device.)
5. On the road, Jerry changes the category for a task on his Pocket PC so it is no longer the default category for synchronized tasks (for example, "Oracle Tasks"). He synchronizes, and the task is deleted from Oracle Sales.

## Restrictions

Recurring tasks are not supported for synchronizing and will generate an error.

The resolution of conflicts depends upon your setting in Outlook Synchronization: Preferences.

## E-Mail Interactions with Desktop Outlook

Sales representatives working in a collaborative environment need to be aware of various sales activities. Many interactions with contacts occur using e-mail. You can include e-mails in your synchronization of Desktop Outlook which results in the e-mails being recorded in interaction history and becoming available for viewing in Oracle Sales.

- E-mails sent to contacts using Desktop Outlook become available to Oracle Sales users in Interaction History, including the contents of the e-mails.
- E-mails received from contacts via Desktop Outlook also become viewable interactions in Oracle Sales.
- When synchronizing, new contacts are created in the enterprise data and any e-mails with the new contacts become interactions for the new contacts.
- If there are duplicate contacts and e-mail addresses in the database, then the interactions are associated with all duplicate contacts.
- E-mails for an existing contact with an unrecognized e-mail address are not placed in interaction history. An error message appears in the synchronization log.

### To record an e-mail communication with a contact as an interaction

- Click the Flag for Interaction icon. It changes to a Flagged for Interaction icon, which when clicked, deselects the e-mail so that it will not be synchronized as an interaction.

- While reading an e-mail in Desktop Outlook, click the Flag for Interaction icon in the Add-Ins tab. The icon changes to a Flagged for Interaction icon, which when clicked, deselects the e-mail so that it will not be synchronized as an interaction.
- In the Desktop Outlook e-mail list, such as your Inbox, highlight one or more e-mails and click the Flag for Interaction icon in the Add-Ins tab.
- If you move an e-mail from one IMAP folder to another, then the first e-mail is marked for deletion and the e-mail in the new folder is a copy. The copy does not include the flag for interaction. The first e-mail will synchronize until it is purged. The e-mail copy must be flagged before it will synchronize as an interaction.

**Note:** If you are using Microsoft Outlook 2007 version then the Flag for Interaction can be found under the Add-Ins menu item.s

#### **To enable e-mail interactions**

- There is an option in your Outlook preferences for Oracle Sales Synchronization that enables e-mail interactions being recorded in Interaction History.
- If you are using Outlook 2000, then the interaction flag does not update automatically unless you make the following change to the parameter that controls the cache used by Outlook.
  1. Exit from Outlook.
  2. Start the Registry Editor (regedt32.exe).
  3. Go to the following key in the registry:  
`HKEY_LOCAL_MACHINE\software\microsoft\office\9.0\outlook`
  4. In the Edit menu, click Add Value and add the following:  
 Value Name: DontCacheInspectors  
 Data Type: REG\_DWORD  
 Value: 0x1
  5. Click OK and exit the Registry Editor.
  6. Start Outlook.

## **Synchronization Preferences**

A situation can occur where you update information for an appointment, contact, or task in Outlook, and also someone else updates the same record either directly on the server or also by synchronizing with the server. If the updated field was blank on either

the client or the server, then no conflict occurs. If both users updated the same field with the same value, then there is no conflict.

However, if you update a field for an appointment, contact, or task in Outlook, but someone else also updated the same field with a different value on the server since your last synchronization, then there is a conflict.

### Example

The following table shows what happens when fields are updated for the same record, and where conflict occurs.

Field	Server	Client	Synchronized
Name	Sandy Johnson	Sandy Johnson	Sandy Johnson
Organization	Business World	Business World	Business World
Phone Number	650-607-6062	650-607-5000	CONFLICT
Fax Number	650-607-6000		650-607-6000
Email Address		sjohnson@bworld.com	sjohnson@bworld.com

How conflicts are resolved is determined by your settings in Outlook Synchronization: Preferences. Your choices are:

- **Server Wins - Duplicate Data:** The appointment, task, or contact in your Oracle category used for synchronization is replaced by the object on the server. Your updated object is moved to an Oracle Conflicts category on the client. You can then compare the two as a reminder of what you changed when you updated the object, make the same edits to the object in the Oracle category, and synchronize again. Your client and the server now reflect both changes to the appointment, task, or contact. Your log notes the fact.

This is the default setting.

- **Server Wins - Replace Client Data:** Your information is automatically replaced with the information from the server. Your log notes the fact.
- **Client Wins - Replace Server Data:** The information on the server is automatically replaced with your client data. Your log notes the fact.

## Subscribing to Alerts

Short Message Service (SMS) is a feature available with some wireless phones that allow

you to send or receive short alphanumeric messages up to 160 characters. You can receive alerts through SMS or via e-mail, or both.

### Example

Some examples of alerts are:

- A service contract is about to expire in a few days. This alert is essential for organizations where the sales representatives are also responsible for selling services. The alerts act as reminders for the sales representative who can track the selling or renewal of the service as a new opportunity.
- Escalated Service Request is helpful for the sales representative to maintain customer relationships. Using the alerts for these events, a sales representative can work with contacts when a service request is escalated.
- The Invoice Overdue alert provides the sales representative information about accounts for which invoices are past due. This allows the sales representative to refrain from selling more into accounts that have delinquencies.

### Notes

- **Navigation:** Oracle Sales, Preferences, Alerts, Subscriptions
- **Available Alerts:** To subscribe to an alert, select your delivery method. To unsubscribe, deselect the delivery method.
- **Mobile Phone Number:** Enter your mobile phone number for receiving text messages.
- **Service Provider:** Select the service provider you use for your mobile phone and text messages.

### E-mail Alert Example

The subject line for a past due invoice says "Overdue invoice #10020885 for Business World." The body of the e-mail contains details about the customer including contact information and amount overdue, as well as invoice details including line items.

### Text Message Alert Example

The text message for a past due invoice says, "Customer 'Business World' has overdue invoice. Transaction 10020885 expires on 10-Dec-2007."

## Prerequisites

- Define the user's e-mail address in Oracle HR.

## Synchronizing Pocket PC

Synchronize whenever you want to update information between your Pocket PC and the enterprise database. Review the business flows for examples of what happens with

different types of information during synchronization.

**Steps:**

1. Start menu, Programs, Oracle Sales Synchronization.
2. Your user name is displayed by default. Enter your password.
3. Perform the synchronization.
4. Review the log if you see any warning messages to find out what information did not synchronize and why.
5. If your synchronization preferences are set to Server Wins - Duplicate Data on Client, then go to the Oracle Conflicts category. If one of your objects had a conflict, then your client version was moved to the Oracle Conflicts category and the live version was updated from the server. You need to again update the object and synchronize again for your changes to take place on the server.

## Restrictions

If information on the enterprise server was updated since your last synchronization, then the conflict resolution depends upon your synchronization preference settings.

Use Advanced, Full Synchronization only if something is not working right on your Pocket PC. If your synchronization fails or you stop it before completing, then you need to run a full synchronization. Full Synchronization replaces all enterprise data on your Pocket PC with data from the enterprise database.

## Synchronizing Desktop Outlook

Synchronize whenever you want to update information between your Desktop Outlook and the enterprise database. Review the business flows for examples of what happens with different types of information during synchronization.

**Steps:**

1. Navigate to Outlook toolbar, Oracle Sales Synchronization
2. Your user name is displayed by default. Enter your password.
3. Perform the synchronization.
4. Review the log if you see any warning messages to find out what information did not synchronize and why.
5. If your synchronization preferences are set to Server Wins - Duplicate Data, then

view the Oracle Conflicts category in Outlook. If one of your objects had a conflict, then your client copy was moved to the Oracle Conflicts category and the live version was updated from the server. You need to again update the object and synchronize again for your changes to take place on the server.

## Restrictions

If information on the enterprise server was updated since your last synchronization, then the conflict resolution depends upon your synchronization preference settings.

Use Options, Advanced, Full Synchronization only if something is not working right. If your synchronization fails or you stop it before completing, then you need to run a full synchronization. Full Synchronization replaces all enterprise data in Outlook with data from the enterprise database.

## Usage Scenarios for Handheld Devices

This section describes different usage models available for various handheld devices and serves as a guideline for leveraging the Outlook integration feature and real-time access to sales information.

### Pocket PC/Palm Devices Using Windows Mobile

The following usage scenarios are supported for Oracle Sales synchronization:

- Users synchronize only their Pocket PCs with Oracle Sales. Then Microsoft ActiveSync synchronizes the data from their Pocket PCs to their Desktop Outlook.
- Users synchronize only their Desktop Outlook with Oracle Sales. Then Microsoft ActiveSync synchronizes the data from Desktop Outlook to their Pocket PCs.
- Users synchronize both their Desktop Outlook and Pocket PCs with Oracle Sales. To prevent duplicate data, Microsoft ActiveSync cannot be used to synchronize contacts, appointments, and tasks.

**Note:** You can use the hyperlinks available in the Notes section of appointments and contacts to access real-time information.

### BlackBerry, Palm Treo, and Nokia Communicator

The following describes the usage model for BlackBerry (version 4.0 or higher), Palm Treo (600 or 6500) and Nokia Communicator (9300 or 9500) devices:

1. Synchronize Desktop or Laptop Outlook directly with Oracle Sales using the Oracle Sales Synchronization program.



2. Use HotSync Manager for Palm Treo, or Nokia PC Suite for Nokia Communicator, or BlackBerry Desktop Manager to synchronize Desktop or Laptop Outlook with the native Personal Information Management (PIM) application.
3. Use the browser available within the device to access real time information.

## 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
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.



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