

ORACLE CRM On Demand

Oracle CRM On Demand Connected Mobile Sales Administration Guide

Version 1.4.23

For Oracle CRM On Demand Release 35
September 2017

Copyright © 2005, 2017 Oracle. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

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 that have purchased support 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.

Contents

Chapter 1: What's New in This Release

Chapter 2: Overview of Oracle CRM On Demand Connected Mobile Sales

- About Oracle CRM On Demand Connected Mobile Sales 9
- Requirements for Using Oracle CRM On Demand Connected Mobile Sales 9
- Supported Mobile Devices 10

Chapter 3: Using Application Composer

- About Application Composer 11
- Selecting Items 12
- About the Application Composer User 13
- Signing On to Application Composer 13
 - Signing on to Application Composer Using SSO 14
 - Signing on to Application Composer Using an Application Composer User ID 14
- Selecting Record Types 15
- Selecting Available Fields 19
 - About Web Links 20
- Filters and Lists in Application Composer 21
 - About Lists 21
 - About View Mode Filters 22
- Customizing Layouts 22
 - Customizing Layouts for Lists and Detail Records 23
 - Customizing Search Fields 24
- Enabling Lead Conversion 25
- Enabling Email for Contacts 25
- Clearing the Cache 26
- Resetting Customizations 27
- Configuring Offline Mode 27

Tracking Application Usage 28

Modern Theme Icons Customizations 28

Configuring the RSS Feed for Account News 29

Configuring the Display of Analytics Reports 29

 Enabling the Reports Icon on the Client Device 29

 Configuring Reports to Display on the Client Device 30

Configuring the Display of Contact Photos 31

Chapter 4: Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices

Installing Oracle CRM On Demand Connected Mobile Sales on iOS Devices 33

Installing Oracle CRM On Demand Connected Mobile Sales on Android Devices 33

Chapter 5: Configuring Oracle CRM On Demand Connected Mobile Sales

Privileges for Oracle CRM On Demand Connected Mobile Sales 35

Enabling Modification Tracking 36

Record Types, Fields, and Customization 37

Limitations Affecting All Supported Mobile Devices 37

IP Address Restrictions 38

Chapter 6: Using Oracle CRM On Demand Connected Mobile Sales

About the Oracle CRM On Demand Connected Mobile Sales Interface 39

Signing on to Oracle CRM On Demand Connected Mobile Sales 40

 Using Single Sign-On 40

 Using User ID and Password Sign-On 41

About Offline Mode 42

 Installing the iOS Oracle Enable Offline Profile 43

 Activating Offline Mode 43

Using List-Detail Record Types 44

 Using List Screens 44

 Searching Lists for Records 45

 Using Detail Screens 49

Working with Leads 50

 Qualifying Leads 50

Rejecting Leads	51
Archiving Leads	51
Converting Leads	52
Using the Calendar	52
Creating a Follow-Up Appointment	53
Displaying All, Completed, and Open Appointments	53
Displaying All, Completed, and Open Tasks	54
Calendar and Contact Synchronization (iOS Only)	55
Finding Clients Near Your Location	56
Using Attachments	57
Searching the Calendar for Records	59
Displaying Analytics Reports	59
User Interface Differences Between Supported Devices	60
Managing Advanced Screen Settings	60
Understanding Error Messages	61

Index

1

What's New in This Release

What's New in Oracle CRM On Demand Connected Mobile Sales Administration Guide, Version 1.4.23 for Oracle CRM On Demand Release 35.

Table 1 lists changes made in this version of the documentation to support version 1.4.23 of the software.

Table 1. What's New in Oracle CRM On Demand Connected Mobile Sales Administration Guide, Version 1.4.23 for Oracle CRM On Demand Release 35

Topic	Description
"Selecting Record Types" on page 15	Modified topic. Added Business Plan and Household as new top-level record types. Added Appointment and Task as new supported related record types for Custom Objects 01-03.
"Selecting Available Fields" on page 19	Modified topic. Added Customized Custom Picklist Fields as an available field type.
"Customizing Layouts" on page 22	Modified topic. Added information that the address fields for the Account and Contact record types can now be removed from detail page layouts.
"Customizing Layouts for Lists and Detail Records" on page 23	Modified topic. Added information on the use of three dashed lines to represent the address block in the Selected Fields pane.
"Configuring Offline Mode" on page 27	Modified topic. Added Business Plan, Custom Objects 01-15, and Household as supported record types.
"Configuring Reports to Display on the Client Device" on page 30	Modified topic. Added instructions on obtaining the URL for V3 Analytic Reports.
"About Offline Mode" on page 42	Modified topic. Added Business Plan, Custom Objects 01-15, and Household as supported record types.
"Finding Clients Near Your Location" on page 56	Modified topic. Added information about the use of latitude and longitude in locating clients.

2

Overview of Oracle CRM On Demand Connected Mobile Sales

This chapter provides an overview of Oracle CRM On Demand Connected Mobile Sales. It contains the following topics:

- [About Oracle CRM On Demand Connected Mobile Sales](#)
- [Requirements for Using Oracle CRM On Demand Connected Mobile Sales](#)
- [Supported Mobile Devices on page 10](#)

About Oracle CRM On Demand Connected Mobile Sales

Oracle CRM On Demand Connected Mobile Sales puts Oracle CRM On Demand on your mobile device, keeping you connected to your data. With Oracle CRM On Demand Connected Mobile Sales you can:

- Customize the application without having to write any code
- Use existing Oracle CRM On Demand customizations
- Add custom fields, field labels, and related objects
- Add custom objects

Requirements for Using Oracle CRM On Demand Connected Mobile Sales

Before you can use Oracle CRM On Demand Connected Mobile Sales you must meet the following requirements:

- Have administration privileges in Oracle CRM On Demand to enable Oracle CRM On Demand Connected Mobile Sales.
- Have the privileges listed in [Table 4 on page 35](#) and have the country, currency, language, and locale set at the user level.
- **Have a valid subscription for Oracle Mobile Sales Data Access.** This requirement enables Oracle CRM On Demand Connected Mobile Sales to exchange data with Oracle CRM On Demand.
- **Configure specific privileges in Oracle CRM On Demand.** For more information, see ["Privileges for Oracle CRM On Demand Connected Mobile Sales" on page 35](#)
- **Use Application Composer to make available record types and fields to users of Oracle CRM On Demand Connected Mobile Sales.** For more information, see [Chapter 3, "Using Application Composer."](#)

- **Install** Oracle CRM On Demand Connected Mobile Sales **on mobile devices**. For more information, see [Chapter 4, "Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices."](#)
- Make sure R16 compatibility mode is turned off and that stateless Web services are used. This prevents unnecessary stateful sessions. For more information on R16 compatibility mode and stateless Web services, see *Oracle Web Services On Demand Guide*.

Supported Mobile Devices

Oracle CRM On Demand Connected Mobile Sales runs on many Android and Apple iOS devices. For the specific list of supported devices, see the Oracle CRM On Demand System Requirements Web page:

<http://www.oracle.com/us/products/applications/crmondemand/system-requirements/index.html>

3

Using Application Composer

This chapter describes Application Composer. It contains the following topics:

- [About Application Composer](#)
- [Selecting Items on page 12](#)
- [About the Application Composer User on page 13](#)
- [Signing On to Application Composer on page 13](#)
- [Selecting Record Types on page 15](#)
- [Selecting Available Fields on page 19](#)
- [Filters and Lists in Application Composer on page 21](#)
- [Customizing Layouts on page 22](#)
- [Enabling Lead Conversion on page 25](#)
- [Enabling Email for Contacts on page 25](#)
- [Clearing the Cache on page 26](#)
- [Resetting Customizations on page 27](#)
- [Configuring Offline Mode on page 27](#)
- [Tracking Application Usage on page 28](#)
- [Modern Theme Icons Customizations on page 28](#)
- [Configuring the RSS Feed for Account News on page 29](#)
- [Configuring the Display of Analytics Reports on page 29](#)
- [Configuring the Display of Contact Photos on page 31](#)

About Application Composer

Application Composer is a Web-based application that administrators use to select which data elements are available to users of Oracle CRM On Demand Connected Mobile Sales. It is designed to work with any size of data set. It has features for searching, filtering, and tagging data elements. Most of these features are not applicable to the small data set in Oracle CRM On Demand. With Application Composer, you can do the following:

- Choose which record types are available
- Choose which fields are available for each record type
- Choose which fields are available on lists for each record type
- Choose which related items are available for each record type

- Configure layouts specific to Oracle CRM On Demand Connected Mobile Sales

CAUTION: Do not run more than one instance of Application Composer at one time. If you open multiple Application Composer windows, it might cause data corruption. For example, having multiple users log into Application Composer at the same time, or opening multiple browser windows with the same user can cause corruption.

When clearing the cache, be aware of the instructions in [“Clearing the Cache” on page 26](#). Be aware that the amount of configuration that Application Composer needs to retrieve affects the amount of time it takes to clear the cache. Clearing the cache can take anywhere from a few minutes to several hours to complete.

Be aware that workflows and process administration rules configured in Oracle CRM On Demand are also in effect in Oracle CRM On Demand Connected Mobile Sales, because these workflows and process administration rules run on the server. For example, if a workflow runs when saving a record in Oracle CRM On Demand, it also runs when saving the same record in Oracle CRM On Demand Connected Mobile Sales. Likewise, a process administration rule that locks a record in Oracle CRM On Demand also locks the same record in Oracle CRM On Demand Connected Mobile Sales.

Selecting Items

Most of your work with Application Composer involves choosing elements from a list of available elements. Application Composer uses a standard, two-list interface with arrow buttons between the elements to move them between the Available list and the Selected list. You can use two styles of arrow buttons:

- The single arrow buttons move a selected item from one list to another.
- The double arrow buttons move all items.

Use the following procedure to select contiguous items.

To select multiple contiguous items

- 1 Click the top item to transfer.
- 2 Shift-click the bottom item to transfer.

Use the following procedure to select noncontiguous items.

To select multiple noncontiguous items

- 1 Click any item.
- 2 Control-click or double-click each additional item

About the Application Composer User

The user ID that you use to sign on to Application Composer affects which fields are available to the users of Oracle CRM On Demand Connected Mobile Sales. You may need to create a special user ID and role solely for the purpose of using Application Composer. This user ID is called the *Application Composer user*. The role and data access of the Application Composer user determines which fields all users of Oracle CRM On Demand Connected Mobile Sales can access. Fields that the Application Composer user cannot access are unavailable to all users of Oracle CRM On Demand Connected Mobile Sales.

To make sure that all users have the same access to fields in Oracle CRM On Demand Connected Mobile Sales as they do in Oracle CRM On Demand, you can create a user and role in Oracle CRM On Demand for the purpose of signing on to Application Composer. This user and role must have access to a superset of the fields required by all roles. Users are still restricted by their roles when using Oracle CRM On Demand Connected Mobile Sales. For example, if you added the Partner Organization Status field to the Account layout, your users with Sales Rep roles still cannot access it because it is not included in their role's definition.

You must create an Application Composer user if all of the following conditions apply:

- You have users with different roles using Oracle CRM On Demand Connected Mobile Sales
- Those roles have different page layouts

If one or more of these conditions do not apply to your implementation then you do not need to create an Application Composer user.

You create the Application Composer user and role in Oracle CRM On Demand. While creating the role, you must take into account the page layouts assigned to the role. For each record type you can choose a Page View Type and a Page Layout Name. You must choose page layouts that specify the superset of fields you require. In some cases, you might have to create such a page layout if one does not already exist.

If a selected page layout has both static and dynamic page view types, choose the static page view type. Oracle CRM On Demand Connected Mobile Sales loads all the fields on the page layout, which for a static layout is a known list of fields. If you are using Release 29 or later and if the page layout is dynamic, Oracle CRM On Demand Connected Mobile Sales cannot determine which fields might be used in all forms of the dynamic layout, and so it loads all possible fields.

NOTE: Dynamic layout support requires the Manage Dynamic Layouts privilege and Oracle CRM On Demand, Release 29 Hot Fix 029.015.000.002HF or later. Users configured with a dynamic page layout in Oracle CRM On Demand see all the configured fields in the default layout of the assigned dynamic layout in Oracle CRM On Demand Connected Mobile Sales.

Signing On to Application Composer

You can sign on to Application Composer using either Single Sign-On or with an Application Composer user ID. For more information, see:

- [Signing on to Application Composer Using SSO on page 14](#)
- [Signing on to Application Composer Using an Application Composer User ID on page 14](#)

Signing on to Application Composer Using SSO

You can sign on to Application Composer using SSO as described in the following procedure:

To sign on to Application Composer using Single Sign-On

- 1 Using a Web browser, go to the Application Composer SSO URL:
`https://mobile.crmondemand.com/admi nui /faces/Admi nHome?ssoid=<SSO_ID>`
Where <SSO_ID> is the single sign-on ID.
- 2 Enter your SSO password, and then click OK.

Signing on to Application Composer Using an Application Composer User ID

Sign on to Application Composer using the Application Composer user ID, as explained in [“About the Application Composer User” on page 13](#). When signing on to the stage environment, your user name needs to be appended with double at signs (@@), followed by the Oracle CRM On Demand stage host name. For example:

`MyCompany/MyAppCompUserI d@crmodstagehostname. com`

When signing on to a production environment, you do not need the double at signs. You must insert a slash (/) between the company name and the user ID. Do not use a backslash (\). For example:

`MyCompany/MyAppCompUserI d`

To sign on to Application Composer

- 1 Using a Web browser, go to the Application Composer URL:
`https://mobile.crmondemand.com/admi nui /faces/Admi nHome`
- 2 Enter the Application Composer user ID.
 - a For a staging environment, use double at signs (@@) between the stage host name and the user name, for example:
`MyCompany/MyAppCompUserI d@crmodstagehostname. com`
 - b For a production environment, insert a slash (/) between the company name and the user ID. For example:
`MyCompany/MyAppCompUserI d.`
- 3 Enter your Application Composer user password, and then click OK.

Selecting Record Types

Oracle CRM On Demand Connected Mobile Sales supports the following record types and relationships between other record types (Table 2):

Table 2. Supported Record Types and Related Record Types

Record Type	Supported Related Record Types
Account	Account, Account Competitor, Account Partner, Address, Appointment, Attachment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Note, Opportunity, Task, Team
Appointment	Attachment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, User
Business Plan	Appointment, Objective, Plan Account, Plan Opportunity, Task
Contact	Account, Address, Appointment, Attachment, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Note, Opportunity, Service Request, Task
Custom Object 01	Account, Appointment, Attachment, Contact, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Task
Custom Object 02	Account, Appointment, Attachment, Contact, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Task
Custom Object 03	Account, Appointment, Attachment, Contact, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Task

Table 2. Supported Record Types and Related Record Types

Record Type	Supported Related Record Types
Custom Object 04	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 05	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 06	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 07	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 08	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 09	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 10	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task

Table 2. Supported Record Types and Related Record Types

Record Type	Supported Related Record Types
Custom Object 11	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 12	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 13	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 14	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Custom Object 15	Account, Appointment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Opportunity, Product, Service Request, Task
Household	N/A
Lead	Appointment, Attachment, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Task
Notes (Message Center)	None

Table 2. Supported Record Types and Related Record Types

Record Type	Supported Related Record Types
Opportunity	Appointment, Attachment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Lead, Note, Opportunity Competitor, Opportunity Partner, Revenue, Task, Team
Product	None
Product Category	None
Service Request	Attachment, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, Note
Task	Attachment, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Custom Object 04, Custom Object 05, Custom Object 06, Custom Object 07, Custom Object 08, Custom Object 09, Custom Object 10, Custom Object 11, Custom Object 12, Custom Object 13, Custom Object 14, Custom Object 15, User
User	None

Your selection of record types affects which record types appear in the user interface for users of Oracle CRM On Demand Connected Mobile Sales. It also affects which record types are in the Available lists in Application Composer’s Select Available Fields and Customize Layout functions. For example, if the Task record type is not in the Selected list, then this record type does not appear anywhere in the Oracle CRM On Demand Connected Mobile Sales interface.

Deselecting record types is not recommended because it prevents any access to that record type, even as a related item. For example, if you deselect the Service Request record type, then that removes service requests from the home page and all related item links, such as from accounts. If you do not want a record type to be on the home page but want it to be available as a related item, then you can deselect its Include on Home Page check box in the Customize Layout screen. For more information, see [“Customizing Layouts” on page 22](#).

To select record types

- 1 Click Select Available Record Types.

A list of available record types and a list of selected record types appear. Initially, all record types are in the Selected list by default.

- 2 To move a record type between lists, select the record, and click an arrow button.

You can Shift-click (contiguous items) or Control-click (noncontiguous items) to select and move multiple record types.

- 3 Click Save.

Selecting Available Fields

After you have selected record types, you can select which fields are available for each record type. These fields appear in Oracle CRM On Demand Connected Mobile Sales in both lists and detail records. Changes you make in Application Composer to available record types and fields do not appear in Oracle CRM On Demand Connected Mobile Sales until you sign off and sign on again. The quantity of fields selected affects the amount of data that must be exchanged between Oracle CRM On Demand Connected Mobile Sales and Oracle CRM On Demand. For optimum performance, select the minimum number of fields necessary.

The list of fields available that appears on the Select Available Fields screen is affected by the user role. For more information, see [“About the Application Composer User” on page 13](#). If there are fields you must have in Oracle CRM On Demand Connected Mobile Sales, but are not listed in the Available Fields list, check to make sure those fields are available to your Application Composer user in Oracle CRM On Demand and are in the page layouts available to your role.

The following field types are supported:

- Checkbox
- Currency
- Customized Custom Picklist Fields (supported for Account, Contact, Lead, and Opportunity)
- Date
- Date/Time
- Integer
- Multi-Select Picklist
- Note Fields (supported for Activity {Comments field only}, Contact, Custom Objects 04-15, and Opportunity)
- Number
- Percent
- Phone
- Picklist
- Text (Long)
- Text (Short)
- Web Link

The following field type is not supported:

- Concatenated Field

Make sure that you select fields that are of field type ID in Oracle CRM On Demand. This typically includes fields that end with the letters Id. Row Id should always be selected as an available field. The Id fields are used to link different record types. Oracle CRM On Demand Connected Mobile Sales uses these fields to link related records, such as accounts, appointments, contacts, leads, service requests, and tasks to each other.

If you use a Custom Object 01, Custom Object 02, and Custom Object 03 as both top-level and child-records, you must configure the available fields for both the top-level and child-level combinations you plan to use. For example, when adding a custom field to Custom Object 01, you must add the same custom field to Account - Custom Object 01 or Task - Custom Object 01.

If you have record types that exist as both a top-level object and as a child object, for example if Contact is both a top-level object and a child of the Account record type, then make sure that both configurations have the same fields.

To select available fields

- 1 Click Select Available Fields.

The list of available record types appears. If the record type that you want does not appear, then you can make it available using the Select Available Record Types function. For more information, see [“Selecting Record Types” on page 15](#).

- 2 Click a record type.

A list of Available fields and a list of Selected fields appears.

- 3 To move a field between lists, select the field, and click an arrow button.

You can Shift-click (contiguous items) or Control-click (noncontiguous items) to select and move multiple fields. The ordering of the fields within the Selected list is not important at this time. You can arrange the fields into a specific order using the Customize Layout function. For more information, see [“Customizing Layouts” on page 22](#).

- 4 Click Save.

About Web Links

Web links can be selected similar to other fields, but with the following restrictions:

- Web links can only be used with the following record types:
 - Account
 - Contact
 - Lead
 - Opportunity
- The following Web links can be used:
 - **mailto**. This opens the default mail client.
 - **http**. This opens a Web page using the default Web browsing client.

- **https**. This opens a secure Web page using the default Web browsing client.
- The following Oracle CRM On Demand Web link configuration values are ignored:
 - Web Link Target
 - Display Options
 - Active Link Condition and Display Link Condition
 - Request Method (GET is always used)

Filters and Lists in Application Composer

In addition to the layout of records, you can also set a list or filter to determine which records the users have access to. Each user is already associated with a visibility level, which is set in Oracle CRM On Demand. In Application Composer, you can use the Select Filter menu to further restrict access to records. The menu choices are as follows:

- Use Lists
- All Records I Can See
- All Records I Own
- All records where I am on the team
- All records I or my subordinates own
- All records where I or my subordinates are on the team
- My Default Book

NOTE: Books are not supported, except for the My Default Book selection for filters. If you have managed lists configured to use a book, the results are also displayed in Oracle CRM On Demand Connected Mobile Sales. Although there is no book selector in Oracle Connected Mobile Sales, you can have book support by using this configuration.

About Lists

There are essentially two types of choices: Use Lists (which is the default choice if the selection is left blank) or choose one of the remaining view mode filters in the menu. The Use Lists choice is the recommended choice because you can define multiple lists in Oracle CRM On Demand and these lists can be very specific and adjusted exactly for your needs. For example, you can create a list of recently created accounts, partner accounts, my contacts, recently modified leads, and so on. Oracle CRM On Demand Connected Mobile Sales supports private, public, and system lists.

When Use Lists is enabled, you can only search on the special All-Search list. When accessing a named list from Oracle CRM On Demand, you can only scroll through the records. The sort order of the records is determined by the list configuration in Oracle CRM On Demand.

About View Mode Filters

Using view mode filters is more complicated and is provided mainly for compatibility with previous releases.

NOTE: Because filtering further restricts the records available to each user, and because the selection of a filter affects all users of Oracle CRM On Demand Connected Mobile Sales, you must carefully decide how to construct the visibility settings in Oracle CRM On Demand.

An example of mixing Oracle CRM On Demand visibility settings with Oracle CRM On Demand Connected Mobile Sales filters is as follows: a sales manager who also does direct sales wants visibility to the sales team’s records while in the office, but when traveling wants access only to her own accounts. To create this effect, you set the Oracle CRM On Demand visibility settings for a team, whereas you set the filter to All Records I Own in Application Composer.

The calendar and task functions of Oracle CRM On Demand Connected Mobile Sales (from the Connected Mobile Sales home page) use a fixed view mode that cannot be modified. The filter setting in Application Composer for these record types affects only the Activities Related Item List for other record types. For information on customizing layouts, see [“Customizing Layouts.”](#)

NOTE: You cannot change the filter for the Appointment record type.

Customizing Layouts

Customizing layouts controls the layout lists, detail records, and search fields in Oracle CRM On Demand Connected Mobile Sales. You must customize layouts for each record type. For information on view modes, see [“Filters and Lists in Application Composer” on page 21.](#)

In releases prior to Oracle CRM On Demand Connected Mobile Sales 1.4.23, if address fields for the Account or Contact record types existed on a page layout in Oracle CRM On Demand, then those address fields were copied to Oracle CRM On Demand Connected Mobile Sales and could not be removed. Starting with Oracle CRM On Demand Connected Mobile Sales 1.4.23, you can now remove those fields on detail page layouts only. The following address fields are visible in the Application Composer.

Record Type	Address Fields	Comments
Contact	Contact Address Account Address	The order of address sections for Contact cannot be changed or separated (you cannot put fields between them).
Account	Billing Shipping	The order of address sections for Account cannot be changed or separated (you cannot put fields between them). The Billing field always appears above the Shipping field.

The following information applies to the address fields:

- For address fields, the field names displayed in the Application Composer are the same as the display name as set in Oracle CRM On Demand Field Management.

- The Account and Contact record types use a marker to represent where the address block appears. This marker consists of three dashed lines that behave as a unit. You can move fields above or below this marker, but you cannot move fields between the lines. The use of a single dashed line to represent section breaks and three dashed lines to represent the address block is due to a limitation in the selection pane software.
- The address block marker and address field names in the Selected list box indicate only that these fields appear in the detail records, it does not affect the positioning of these fields. Address field names that appear in the Available list box do not appear in the detail records.
- The positioning of the address fields on list records is determined by the three horizontal dashes symbol.
- If both address fields are added to the list or detail record layouts, no other fields can be placed between them.

Customizing Layouts for Lists and Detail Records

You can customize the layouts for lists and detail records using the following procedure.

To customize layouts

- 1 Click Customize Layouts.
- 2 Click a record type.

The list of available record types appears. If the record type that you want does not appear, then you can make it available using the Select Available Record Types function. For more information, see [“Selecting Record Types” on page 15](#).

- 3 To remove this record type from the home page but retain its availability as a related item, deselect the Include on Home Page check box.

This setting applies only to the record type being edited. The record type does not appear on the home page, but its records can still be accessed as a related item in other record types. For example, if the record type you are editing is Service Request, and you deselect this check box, then an icon for Service Requests does not appear on the home page. However, if you are displaying other record types, such as an account, you can access the service requests for that account.

- 4 Select Include on Home Page to have this record type appear on the application's home page.
- 5 Set the Read Only check box in the Record Type Access section.

The default setting is to have this box cleared. However, if you want the record type to be read only (uneditable), select the Read Only check box. If Read Only is selected, users of Oracle CRM On Demand Connected Mobile Sales then cannot add or edit any records of this record type. Users of other applications, such as Oracle CRM On Demand can add or edit records of this record type. Related items remain editable. For example, if the Opportunity record type is marked as read only, accounts related to an opportunity are still editable.

- 6 (Optional) From the Select Filter menu, choose a filter.

In the Select Filter menu you have a choice between different types of filters or to use lists. It is recommended to use lists instead of a filter. For more information, see [“Filters and Lists in Application Composer” on page 21](#).

A list of the available fields and a list of selected fields appear. This selection controls which fields appear in a list view. You must choose between one and three fields to define the list view for the record type.

- 7 Select the fields to appear in the list view of a record and click Customize Detail.

NOTE: You cannot change the list fields for the Appointment record type.

The Customize Detail form appears.

- 8 Select the fields that you want to appear in the detail view of a record.

- 9 To move a field between lists, do one of the following:

- Select the field, and click an arrow button.
- Shift-click (contiguous items) or control-click (noncontiguous items) to select and move multiple fields.

- 10 To reorder the fields within the Selected list box, use the up and down arrow buttons.

Within the Selected list box are dashed lines that represent section breaks. The number of sections is specific to the record type. For example, the Account record type has four sections (three dashed-line separators), whereas the Service Request record type has three sections (two dashed-line separators). You cannot add, remove, or change the order of sections. Typically, the middle sections contain address information. You cannot add fields to or remove fields from an address section.

- 11 Click Select Related Items.

A list of available and selected record types appear. The selected record types you choose here appear at the bottom of the display of a detail record as the related items. For example, if you are displaying a contact record, you can have buttons at the bottom of the record to jump to related items, such as activities, leads, and service requests.

- 12 Select the related items, and click Save.

Customizing Search Fields

In the Oracle CRM On Demand Connected Mobile Sales client there are multiple search capabilities. For more information on the search functions, see [“Searching Lists for Records” on page 45](#). You can customize which fields are available for searching.

To customize search fields

- 1 In the Application Composer click Customize Layouts.
- 2 Click Customize Search.

- 3 Click either the Account top-level record type or the Account child record type.
A list of Available Search fields and a list of Selected Search fields appears.
- 4 To move a Search field between lists, select the Search field, and click an arrow button.
You can Shift-click (contiguous items) or Control-click (noncontiguous items) to select and move multiple Search fields.
- 5 Click Save.

Enabling Lead Conversion

In Oracle CRM On Demand Connected Mobile Sales you can convert leads into accounts, contacts, and opportunities if you enable this feature in the Application Composer.

To enable lead conversion

- 1 In Application Composer, click Select Available Fields within the Task pane under the Record Type Customization heading.
- 2 Click Lead.
- 3 Move the following fields from the Available shuttle window to the Selected shuttle window:
 - Associated Account
 - Associated Contact
 - Associated Opportunity
 - Company
 - Description
 - Estimated Close Date
 - First Name
 - Full Name
 - Last Name
 - Next Step
 - Potential Revenue
- 4 Click Save.

Enabling Email for Contacts

Oracle CRM On Demand Connected Mobile Sales can use the mobile device's default email client to send email to contacts, if the following conditions are met:

- The Email field is in the Selected list for the Contact record type.

- The Never Email field is in the Selected list for the Contact record type.
- The active contact record has a valid email address in the Email field.
- In the active contact record the Never Email check box is deselected.

To enable email for contacts

- 1** In Application Composer, click Select Available Fields.
The list of available record types appears.
- 2** Click the Contact record type.
A list of Available fields and a list of Selected fields appears.
- 3** Make sure the Email and Never Email fields are in the Selected list.
To move a field between lists, select the field, and click an arrow button.
- 4** Click Save.

Clearing the Cache

While you use Oracle CRM On Demand Connected Mobile Sales your requests for information, such as layout and field configuration information, require the server to request data from your database. For performance, the server caches its database read-operations so it can reuse the same data without having to read it from the database again.

If you make changes in Oracle CRM On Demand to selected fields, such as adding new values to a picklist, changing record type names or field names, changing the product list, adjusting page layouts, or adding new fields or custom objects, then the cached data is no longer accurate. In these cases you must clear the cache.

After you make changes in Application Composer or Oracle CRM On Demand, those changes may require that affected Web services time out before the changes take effect. The default session idle time-out period for Web services is 10 minutes, but be aware that your implementation may have a different time set.

Be aware that the amount of configuration data that Application Composer needs to retrieve affects the amount of time it takes to clear the cache. Clearing the cache can take anywhere from a few minutes to several hours to complete.

To clear the cache

- 1** In Application Composer, click Clear Cache, and then click OK.
- 2** Sign off from the Application Composer.
- 3** Close your Web browser.

After you clear the cache, the initial accesses in Oracle CRM On Demand Connected Mobile Sales requires time to retrieve the data from the database. After those initial data accesses, the cache is populated and performance improves.

When clearing the cache, you might find that the browser is still using older, cached data. To make sure you are not accessing an old cache, sign off and then sign on again. You might need to clear cookies in the browser. Alternatively, you can use an incognito mode in the browser to make sure that content is reloaded fresh from the server.

Resetting Customizations

When you make customizations to Oracle CRM On Demand Connected Mobile Sales, customization records are created on the Connected Mobile Sales server. If you are having problems with your Oracle CRM On Demand Connected Mobile Sales configuration, you have the option of removing all customizations. After removing all customizations, you can reconfigure Oracle CRM On Demand Connected Mobile Sales starting with the default application configuration.

NOTE: The Reset Customizations action cannot be undone. All customizations are permanently lost if you take this action. No Oracle CRM On Demand data or configuration is affected by this action.

To reset customizations

- In Application Composer, click Reset Customizations, and then click OK.

Configuring Offline Mode

Offline mode enables users to access records when they do not have network connectivity. Offline mode is disabled by default, but can be enabled through the Application Composer. The following types of records can be cached (both list and detail page records) and read in Offline mode if this mode is turned on:

- Account
- Address
- Appointment
- Business Plan
- Calendar
- Contact
- Custom Objects 01-15
- Household
- Interest
- Lead
- Note
- Opportunity
- Product
- Product Category

- Revenue
- Service Request
- Task
- Team
- User

The quantity of records that can be cached in the client device depends on the individual device's storage. Oracle CRM On Demand Connected Mobile Sales stores a maximum of 50 MB, but if the device does not have 50 MB available, Oracle CRM On Demand Connected Mobile Sales works within the device's storage limitations to store as much as the device allows. To configure Offline mode, use the following procedure.

To configure Offline mode in Application Composer

- 1** In Application Composer, navigate to the Application Customization tab, Advanced, and then Options.
- 2** In the Options pane, select or deselect the Allow Offline Mode check box.
- 3** Close your Web browser.

Tracking Application Usage

You can track the application usage by user. This is helpful when you want to troubleshoot a user problem or to improve your understanding of what actions and operations users perform in the field.

To display usage in Oracle CRM On Demand, navigate to Admin, and then to Web Services Utilization.

For more information on the Web Services Utilization screen, see the Oracle CRM On Demand Online Help.

Modern Theme Icons Customizations

The record type icons set for the modern theme within Oracle CRM On Demand are available in Oracle CRM On Demand Connected Mobile Sales. To select the modern theme record type icons, complete the following procedure.

To select the modern theme record type icons

- 1** In Oracle CRM On Demand, click the Admin link in the top right corner of any homepage.
- 2** Click Application Customization and then Customize Record Types.
- 3** Choose the appropriate icons in the Modern Icon column.

After you have selected the modern theme icons in Oracle CRM On Demand, the company administrator must clear the cache in the Oracle CRM On Demand Connected Mobile Sales server. For information on clearing the cache, see ["Clearing the Cache" on page 26](#).

Configuring the RSS Feed for Account News

The client application can show news for a selected account using an RSS feed as configured in the Account Web Applet in Oracle CRM On Demand Release 32 or later. Configure the Web applet for the Account Detail page with the values defined in [Table 3](#).

Table 3. RSS Feed Configuration

Field	Value
Name	Connected Mobile Sales RSS Feed
Location	Detail Page
Type	Feed
URL	A valid RSS URL

All other fields can be configured as desired.

Configuring the Display of Analytics Reports

Analytics reports from Oracle CRM On Demand can be displayed in the Oracle CRM On Demand Connected Mobile Sales mobile client. Reports must be selected by an administrator and must not contain any Adobe Flash components. If a report contains both Flash and non-Flash components, only the non-Flash components appear.

Configuring reports to display on the client device requires you to enable the reports icon on the client display, and then to configure the individual reports available to the users.

Enabling the Reports Icon on the Client Device

For users to access reports on the client device you must first enable the Reports icon using the following procedure.

To enable the Reports icon

- 1 In Application Composer, navigate to Customize Layout and then to Reports.
- 2 Select Include on Home Page.

Configuring Reports to Display on the Client Device

You can configure multiple reports to display in Oracle CRM On Demand Connected Mobile Sales. The procedures are different for V2 and V3 Analytics. To configure report display for V2 Analytics, see “[Configuring Reports for V2 Analytics](#)”. To configure report display for V3 Analytics, see “[Configuring Reports for V3 Analytics](#)”.

Configuring Reports for V2 Analytics

Use the following procedure to configure V2 Analytics reports to display on the client device.

To configure a V2 analytics report to display in Oracle CRM On Demand Connected Mobile Sales

- 1 In Oracle CRM On Demand, display a report.
- 2 Copy the URL for the report.
The URL format is:
`https://<POD>/OnDemand/user/ReportIFrameView?SAWDetailViewURL=saw.dll?Go&Path=<REPORT_PATH>&AnalyticsReportName=<REPORT_NAME>`
Where <POD>, <REPORT_PATH>, and <REPORT_NAME> are specific to your installation and report.
- 3 In Application Composer, click Configure Reports.
- 4 In the Configure Reports page, click Create.
- 5 In the Create Reports page, fill in these fields:
 - **Report Name.** Create a name for this report. This name appears in the Oracle CRM On Demand Connected Mobile Sales mobile client.
 - **Description.** Enter an optional description of the report.
 - **Report URL.** Paste in the URL of the report from step 2.

Configuring Reports for V3 Analytics

Use the following procedure to configure V3 Analytics reports to display on the client device.

To configure a V3 analytics report to display in Oracle CRM On Demand Connected Mobile Sales

- 1 In Oracle CRM On Demand, display a report.
You need to obtain the URL of the report. The format of the URL is:
`https://<POD>/OnDemand/user/analytcs12c/saw.dll?PortalGo&Action=prompt&path=<REPORT_PATH>`
Where <POD> and <REPORT_PATH> are specific to your installation and report.
- 2 Depending on your browser, complete the following steps to obtain the report URL:

- a** For Apple Safari, complete the following steps:
 - ❑ Right-click within the report area and select Show Frame Source.
 - ❑ In the left-window, right-click the saw.dll name and choose Copy Link URL.
 - ❑ Paste the value into the Report URL field in Application Composer.
 - b** For Google Chrome and Mozilla Firefox, complete the following steps:
 - ❑ Right-click within the report area and select View Frame Source.
A new window appears showing the frame's source code.
 - ❑ Copy the URL after view-source.
 - ❑ Paste the value into the Report URL field in Application Composer.
 - c** For Microsoft Internet Explorer, complete the following steps:
 - ❑ Right-click on the report and choose Properties from the pop-up menu.
The Properties dialog box appears.
 - ❑ Find the Address (URL) field, right-click and copy the URL (it may appear to be incomplete, but the copy operation does get the entire URL).
 - ❑ Paste the value into the Report URL field in Application Composer.
- 3** In Application Composer, click Configure Reports.
 - 4** In the Configure Reports page, click Create.
 - 5** In the Create Reports page, fill in these fields:
 - **Report Name.** Create a name for this report. This name appears in the Oracle CRM On Demand Connected Mobile Sales mobile client.
 - **Description.** Enter an optional description of the report.
 - **Report URL.** Paste in the URL of the report from step 2.

Configuring the Display of Contact Photos

The Oracle CRM On Demand Connected Mobile Sales mobile client can display contact photos. The photo appears in the upper left corner of the contact detail page and contact edit page. If the display of photos is configured, and a contact does not have a photo, then the contact edit page displays a placeholder image. On the mobile client you can upload a photo for the contact.

To configure the display of contact photos

- 1** In Oracle CRM On Demand, click the Admin link in the top right corner of any homepage.
- 2** Click Application Customization and then Customize Record Types.
- 3** Select the Display Image check box for the Contact record type.

- 4 Clear the Oracle CRM On Demand Connected Mobile Sales cache. For more information on clearing the cache, see [Clearing the Cache on page 26](#).

To upload a contact photo from a client device

- 1 In Oracle CRM On Demand Connected Mobile Sales mobile client, display a contact.
- 2 If a placeholder image appears instead of a contact photo, tap the placeholder image.
- 3 Select a photo on your mobile device.

4

Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices

This chapter describes how to install Oracle CRM On Demand Connected Mobile Sales. It contains the following topics:

- [Installing Oracle CRM On Demand Connected Mobile Sales on iOS Devices](#)
- [Installing Oracle CRM On Demand Connected Mobile Sales on Android Devices](#)

Installing Oracle CRM On Demand Connected Mobile Sales on iOS Devices

Back up your personal device data before you install Oracle CRM On Demand Connected Mobile Sales.

NOTE: Do not install Oracle CRM On Demand Connected Mobile Sales on unsupported devices.

For more information on the supported devices, see [“Supported Mobile Devices” on page 10](#).

To install the Oracle CRM On Demand Connected Mobile Sales client from the Apple App Store

- 1 In the iTunes application, navigate to the App Store and search for *Oracle CRM On Demand Connected Mobile Sales* to help you locate it.
- 2 Download and install the Oracle CRM On Demand Connected Mobile Sales client from the Apple App Store.

Installing Oracle CRM On Demand Connected Mobile Sales on Android Devices

Back up your personal device data before you install Oracle CRM On Demand Connected Mobile Sales.

NOTE: Do not install Oracle CRM On Demand Connected Mobile Sales on unsupported devices.

For more information on the supported devices, see [“Supported Mobile Devices” on page 10](#).

To install the Oracle CRM On Demand Connected Mobile Sales client from Google Play

- 1 Navigate to Google Play and search for Oracle CRM On Demand Connected Mobile Sales.
- 2 Download and install the Oracle CRM On Demand Connected Mobile Sales client from Google Play.

NOTE: The Android version of Oracle CRM On Demand Connected Mobile Sales is English-only.

5

Configuring Oracle CRM On Demand Connected Mobile Sales

This chapter describes how to configure Oracle CRM On Demand Connected Mobile Sales. It contains the following topics:

- [Privileges for Oracle CRM On Demand Connected Mobile Sales](#)
- [Enabling Modification Tracking on page 36](#)
- [Record Types, Fields, and Customization on page 37](#)
- [Limitations Affecting All Supported Mobile Devices on page 37](#)
- [IP Address Restrictions on page 38](#)

Privileges for Oracle CRM On Demand Connected Mobile Sales

To work in Oracle CRM On Demand Connected Mobile Sales your account must have specific privileges enabled in Oracle CRM On Demand. [Table 4](#) lists these privileges. Privileges are granted in Step 4 of Role Management. For information on granting privileges and user roles, see *Oracle CRM On Demand Online Help*.

Table 4. Privileges for Oracle CRM On Demand Connected Mobile Sales

User Type	Privilege Name	Category	Description
Admin, User	Connected Mobile Sales Access	Desktop/Mobile	Enables users to connect to Oracle CRM On Demand from Oracle CRM On Demand Connected Mobile Sales on supported devices.
Admin	Connected Mobile Sales Application Composer Access	Desktop/Mobile	Enables access to the Application Composer.
Admin	Manage Connected Mobile Access	Desktop/Mobile	Users (usually administrators) who have been granted this privilege can grant the Connected Mobile Sales Access and Connected Mobile Sales Application Composer Access privileges to other roles.
Admin, User	Enable Web Services Access	Integration: Web services	The users' accounts must have this privilege enabled so they can send Web service requests.

Table 4. Privileges for Oracle CRM On Demand Connected Mobile Sales

User Type	Privilege Name	Category	Description
User	Manage Addresses	CRM	Required for proximity searching on the user device.
User	Maps Integration	Integration: Maps	Required for proximity searching on the user device.

If the privileges in [Table 4 on page 35](#) are not available to you, contact Oracle Global Customer Support.

In addition to the privileges in [Table 4 on page 35](#), a user who wants to use proximity searching must also have the Address Location record type access (Step 2 in Role Management).

After changing access profile and role privileges, clear the Application Composer cache. For more information, see ["Clearing the Cache" on page 26](#).

Enabling Modification Tracking

Modification tracking must be enabled in Oracle CRM On Demand so that invitees can be successfully added or removed from appointments.

To enable modification tracking

- 1 In Oracle CRM On Demand, click Admin (in the upper-right corner).
- 2 Click User Management and Access Controls, then Role Management.
- 3 For each role that affects your users, do the following:
 - a Click Edit next to the role.
 - b Navigate to Step 2 - Record Type Access.
 - c Select the check box in the Has Access column for the Modification Tracking object.
 - d Click Finish.
- 4 Click Back to User Management and Access Controls.
- 5 Click Access Profiles.
- 6 For each access profile that affects your users, do the following:
 - a Click Edit next to the access profile.
 - b Navigate to Step 2 - Specify Access Levels.
 - c For the Modification Tracking object use the drop-down menu to set the access level to Read/Edit/Delete.
 - d Click Finish.
- 7 Click Back to User Management and Access Controls.

- 8 Click Back to Admin Homepage.
- 9 In the Business Process Management section, click Enable Modification Tracking.
- 10 Select the check boxes for the following record types:
 - Activity
 - Activity User
 - Contact
 - Position
 - User
- 11 Click Back to Admin Homepage.

Record Types, Fields, and Customization

The following customizations you make in Oracle CRM On Demand are visible directly in Oracle CRM On Demand Connected Mobile Sales:

- Names of fields
- Names of record types
- picklists (including cascading picklists and multi-select picklists)

If there are customizations that you want to use in Oracle CRM On Demand Connected Mobile Sales, then configure them in Oracle CRM On Demand before deploying them. For information about customizing these items, see *Oracle CRM On Demand Online Help*.

Limitations Affecting All Supported Mobile Devices

The following limitations affect all supported mobile devices:

- Field names in Oracle CRM On Demand Connected Mobile Sales are shortened to fit the available space.
- Oracle CRM On Demand Connected Mobile Sales does not check the validity of field entries as you enter each field. When you save a record, then entire record is checked for validity. If the validity check fails, Oracle CRM On Demand Connected Mobile Sales displays the appropriate error messages.
- You cannot delete any records.
- Access to analytic content, such as charts or graphs, is not available.
- Proximity search requires the following in your user role:
 - Access to the Address Location record type
 - Manage Addresses privilege

- Maps Integration privilege
- Default values containing expressions configured in Oracle CRM On Demand are not supported.

IP Address Restrictions

Oracle CRM On Demand Connected Mobile Sales uses the IP address restrictions list configured in Oracle CRM On Demand. If an IP address is restricted in Oracle CRM On Demand, it is also restricted in Oracle CRM On Demand Connected Mobile Sales. Administrators can restrict access to Oracle CRM On Demand so that users who have a certain role can sign in to Oracle CRM On Demand only from devices that have IP addresses within the ranges that are specified for that role.

6

Using Oracle CRM On Demand Connected Mobile Sales

This chapter describes how to use Oracle CRM On Demand Connected Mobile Sales. It contains the following topics:

- [About the Oracle CRM On Demand Connected Mobile Sales Interface](#)
- [Signing on to Oracle CRM On Demand Connected Mobile Sales on page 40](#)
- [About Offline Mode on page 42](#)
- [Using List-Detail Record Types on page 44](#)
- [Working with Leads on page 50](#)
- [Using the Calendar on page 52](#)
- [Calendar and Contact Synchronization \(iOS Only\) on page 55](#)
- [Finding Clients Near Your Location on page 56](#)
- [Using Attachments on page 57](#)
- [Displaying Analytics Reports on page 59](#)
- [User Interface Differences Between Supported Devices on page 60](#)
- [Managing Advanced Screen Settings on page 60](#)
- [Understanding Error Messages on page 61](#)

About the Oracle CRM On Demand Connected Mobile Sales Interface

Oracle CRM On Demand Connected Mobile Sales is the application that runs on mobile devices and connects the mobile user to Oracle CRM On Demand. For information on supported mobile devices, see [“Supported Mobile Devices” on page 10](#).

Company administrators can customize the list of supported record types and accessible records. The implementation can vary from company to company, but within a single company the implementation is consistent for all users in that company. For information on how to customize the implementation, see [“About Application Composer” on page 11](#).

Because each company’s implementation differs, this guide cannot be specific about any implementation. This guide covers the user interface elements used in Oracle CRM On Demand Connected Mobile Sales. The user interface is consistent in its treatment of almost all record types. When you learn how to access one record type, you can apply the same approach to the others. The only exception is the calendar. Whereas most record types display a list first, and then you drill down on detail records and then related records, calendar items work better when viewed as a traditional calendar. For more information, see:

- [About Offline Mode on page 42](#)
- [Using List-Detail Record Types on page 44](#)
- [Using the Calendar on page 52](#)

For information on installing Oracle CRM On Demand Connected Mobile Sales on a mobile device, see [Chapter 4, “Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices.”](#)

Signing on to Oracle CRM On Demand Connected Mobile Sales

There are two methods for signing on to Oracle CRM On Demand Connected Mobile Sales:

- [Using Single Sign-On](#)
- [Using User ID and Password Sign-On on page 41](#)

Using Single Sign-On

Single Sign-On (SSO) authentication is subject to the following limitations:

- The supported profiles are Security Assertion Markup Language (SAML) 1.1 Browser/Artifact profile and SAML 2.0 Browser/Artifact profile.
NOTE: SAML Federation with Basic Authorization on the Identity Provider (IdP) is not supported.
- Browser/POST profiles are not supported.
- Client support is provided on Android and iPhone devices only.
- The Intersite Transfer Service (ITS) URL must be correctly configured in Oracle CRM On Demand and must use destination-site-first. Because of the context-sensitive nature of the Target URL, do not specify a concrete Target URL when configuring the ITS URL for SSO Authentications property. Instead, use the \${TARGET} macro as a substitute for the concrete Target URL. For more information, contact Oracle Customer Care.
- A user who signs on with SSO cannot use CalDAV or CardDAV synchronization as described in [“Calendar and Contact Synchronization \(iOS Only\)” on page 55](#).

NOTE: On Android devices the user interface differs depending on whether your device has a hardware button to access menu options (called the hardware menu button) which is typically on older devices. For example, on the advanced screen accessed from the sign on screen, the option for SSO is typically accessed by tapping the menu button in the top right corner. However, on devices with a hardware menu button, the hardware menu button must be used to access the SSO option.

Enabling Single Sign-On as the Default Sign On Method

You can sign on to a Oracle CRM On Demand Connected Mobile Sales session using either SSO or User ID and Password. You can also set SSO as the default method of signing on.

To set SSO as the default sign on method

- 1 In Android, tap the Action Overflow icon (three vertical dots) and tap the Sales App Advanced screen. Activate the menu (either using the hardware menu button or clicking the ellipsis icon (...) on the top right), and then select Enable Single Sign On.
- 2 In iOS, open the Settings app. Find and select the Sales App, and then make sure Single Sign On is enabled.

If you want to resume using User ID and Password for signing on, repeat these steps and disable the Enable Single Sign On setting.

To sign on to Oracle CRM On Demand Connected Mobile Sales using Single Sign-On

- Access the following URL:
`https://mobile.crmondemand.com/odui/faces/Home?ssoid=<SSO_ID>`
Where <SSO_ID> is the Single Sign-On ID.

Using User ID and Password Sign-On

This topic describes how to sign on to Oracle CRM On Demand Connected Mobile Sales using a user name and password. There are two hosts available and they have the following names:

- Production Host = mobile.crmondemand.com
- Staging Host = mobile9aaa.crmondemand.com

To sign on to the production environment, use your Oracle CRM On Demand username and password. Your account role must have the access privileges listed in [Table 4 on page 35](#).

To sign on to the stage environment, use the following convention:

Username: <CRMODStageLogin>@@<CRMODStageHostname>

Password: <CRMODStagePassword>

The <CRMODStageHostname> need only include the host name. For example:

secure-ausomxala.crmondemand.com

If required, you may include the protocol and the port number, however anything following double at signs (@@) must be URL encoded. For example, a colon must be replaced with %3A.

To sign on to Oracle CRM On Demand Connected Mobile Sales using User ID and Password with a browser

- 1 Tap the Sales icon.
Oracle CRM On Demand Connected Mobile Sales loads and then displays its sign on screen.

- 2 Enter your Oracle CRM On Demand user name (for example, MyCompany/MyUserId) and password.

The user name entry is a combination of your company name and user account name. It follows this format: AccountName/FirstName, for example, PatLee/Pat

NOTE: You must put a slash (/) between the company name and the user ID. Do not use a backslash (\).

- 3 Tap Login.

NOTE: The security questions typically required to sign on to Oracle CRM On Demand initially do not appear on the mobile device. If you have not set up the required security questions, you cannot sign on to Oracle CRM On Demand Connected Mobile Sales. In this case, sign on to Oracle CRM On Demand using a Web browser on your personal computer or laptop computer, and set up the security questions.

Oracle CRM On Demand Connected Mobile Sales connects to Oracle CRM On Demand and downloads the latest information. For convenience, you can store your user name and password.

Oracle CRM On Demand Connected Mobile Sales stores only credentials on the mobile device and those credentials are always encrypted. The mobile device settings control the access and encryption of that information.

About Offline Mode

Offline mode caches records (within the limits of the mobile device's available memory, up to 50 MB) for use when your mobile device is not connected to the network. The following record types can be cached for offline access:

- Account
- Address
- Appointment
- Business Plan
- Calendar
- Contact
- Custom Objects 01-15
- Household
- Interest
- Lead
- Note
- Opportunity
- Product
- Product Category

- Revenue
- Service Request
- Task
- Team
- User

You can activate and deactivate Offline mode using the menu icon (three horizontal bars) at the top of the page. Before Offline mode can appear in the menu, the following must be true:

- The administrator must enable Offline mode in the Application Composer.
- If you have an iOS device, you must have installed the Oracle Enable Offline Access Profile. For more information, see [“Installing the iOS Oracle Enable Offline Profile”](#).
- If you have an Android device, you must enable encryption on the device.

Installing the iOS Oracle Enable Offline Profile

If you have an iOS device, you cannot use Offline mode until you install the Oracle Enable Offline Access Profile. Use the following procedure to install the profile.

To install the Oracle Enable Offline Access Profile on an iOS device

- 1 On the iOS device, tap the menu icon (three horizontal bars) at the top of the page and choose Configure Offline Access.
- 2 Follow the prompts to install the profile.
- 3 Sign out from the Oracle CRM On Demand Connected Mobile Sales app.
- 4 Sign on to the Oracle CRM On Demand Connected Mobile Sales app.

When the profile is installed, the Configure Offline Access choice no longer appears on the menu, and is replaced with a choice for Work Offline.

Activating Offline Mode

The bar at the top of the page includes a menu icon (three horizontal bars). You can use this menu to access any of the configured record types (such as accounts, contacts, and so on). There are two additional items in the menu: Work Offline and Sign Out.

Work Offline only appears in the menu if configured by the administrator. If Offline mode has been enabled for you by your administrator, you can turn it on or off for your mobile device using the Work Offline command on the menu. If storage space is limited on your mobile device, you may wish to have Offline mode turned off.

When Offline mode is activated, any opportunity list pages and opportunity detail pages are cached for offline use. If no list pages or detail pages are cached, then during Offline mode, the Opportunity icon does not appear.

Any opportunity list page that is displaying an opportunity record that can be viewed in Offline mode has a white background, while those that have not been cached and are therefore not available for Offline mode use have a gray background. If you try to access a record within a list that has not been cached, then nothing happens. If you try to access a record within a list that has been cached, then the details of the opportunity are displayed. It is not possible to view any related information of the opportunity record while using Offline mode.

When Offline mode is active, only the following options are available under the menu:

- Home
- Opportunities (this appears only if there are opportunity records cached)
- Work Offline
- Sign Out

If your device loses Internet connectivity and Oracle CRM On Demand Connected Mobile Sales detects you are trying to access records, then Oracle CRM On Demand Connected Mobile Sales prompts you to activate Offline mode.

When your device reconnects to the Internet, you can return to Online mode by choosing Work Online from the menu.

Using List-Detail Record Types

This topic applies to the majority of record types, such as Account, Activity, Lead, Service Request, and so on. It does not apply to calendar appointments.

The Home screen of Oracle CRM On Demand Connected Mobile Sales displays an icon for each record type that the administrator has configured. You can navigate within a record type in the following sequence:

- 1 Home screen.
- 2 List screen. For information, see ["Using List Screens."](#)
- 3 Detail screen. For information, see ["Using Detail Screens" on page 49.](#)
- 4 Related items or native application.

Using List Screens

When you select an icon (except the Calendar icon) on the Home screen, Oracle CRM On Demand Connected Mobile Sales displays a List screen for the record type. The list displays one to three fields of information for each record. The list displays only records you have access to. You can scroll through this list. For information on selecting which fields appear in this list, see ["Selecting Available Fields" on page 19.](#)

To use a List screen

Do one of the following:

- To add a new record, tap the Add (+) button in the title bar.
- On iOS devices, you may have to tap the action button to see the Add (+) button and other available actions.
- To display the detailed information for a record, tap it.
- To go back to the Home screen, tap the Back button in the title bar.
- To search for records, enter information (such as a name) in the Search field and click Search. On iOS devices, scroll the list up to reveal the Search field. For more information, see [“Searching Lists for Records” on page 45](#).
- For tasks lists, you can tap Select and choose between displaying Open Tasks, Completed Tasks, or All Tasks.
- For contact lists, you can tap and hold on a record to bring up a menu of actions. The actions are:
 - **Call.** Call is available if either the work phone number or cellular phone number are populated and have been made available in the Application Composer. If both fields are populated, then the work phone number is the default.
 - **Email.** Email opens the device’s default mail client and populates the To field with the contact’s email address. The Email option appears only if the contact’s Never Email check box is deselected and the administrator has enabled sending email in the Application Composer. For more information, see [“Enabling Email for Contacts” on page 25](#).

Searching Lists for Records

You can search lists to find specific records. You use the following methods to find records:

- [Context-Sensitive Search for Custom Objects 1-3](#)
- [Search Wildcards and Case-Insensitivity](#)
- [Finding Records Using Managed Lists on page 46](#)
- [Finding Records Using a Multiple Field Search on page 47](#)
- [Finding Records Using Look Up on page 48](#)

Context-Sensitive Search for Custom Objects 1-3

If you create a new record for a Custom Object 01, Custom Object 02, or Custom Object 03, and select an account, then the opportunities list displays only the opportunities associated with the selected account.

Search Wildcards and Case-Insensitivity

The search function is case insensitive and automatically adds a wildcard at the end. For example, if the name of an account is Action Rentals, you can find it using any of the following search terms:

- Action
- action

- Action Ren
- action rent

You can also add an asterisk (*) as a wildcard at the start of the search term as follows:

- * Rentals
- * Rental
- *rental
- *rent

Finding Records Using Managed Lists

You can search to find records within a managed list. Use the following procedure to search a managed list.

To find a record in a managed list

- 1 Display any list of records.
- 2 Tap the ellipsis icon at the top of the list.
- 3 Tap Select List.
The device displays a list of managed lists.
- 4 Select a managed list and tap Save.
The device displays the records in the managed list.
- 5 Tap the Magnifying Glass icon (Android) or drag down on the list (iOS).
- 6 Search for the records using the standard search techniques.

Finding Records Using a Multiple Field Search

You can find records of top-level objects and child objects using multiple search fields. For each record type, you can search using a different set of fields. If you specify values for multiple search fields within a record type, Oracle CRM On Demand Connected Mobile Sales conducts an AND search. For example, if the record type is Contact, and you specify a First name and Last Name, then Oracle CRM On Demand Connected Mobile Sales returns only records that match both the First Name AND Last Name. [Table 5](#) shows the search fields available for each record type.

Table 5. Available Search Fields by Record Type

Record Type	Search Fields	Sort Field	Sort Order
Account	Account Name, Billing: Address 1, Billing: City, Billing: State/Province, Location, Primary Contact, Shipping: Address 1, Shipping: City, Shipping: State/Province	Account Name	Ascending
Appointment (as a related item)	Location, Subject	Start Time	Ascending
Contact	Last Name, First Name, Email	Last Name	Ascending
Custom Object 1-15	Name, Quick Search 1, Quick Search 2 (see note below)	Name	Ascending
Lead	Last Name, First Name, Company	Last Name	Ascending
Note	Subject	Modified Date	Descending
Opportunity	Opportunity Name	Opportunity Name	Ascending
Product	Product Name, Product Category, Part Number, Status	Product Name	Ascending
Product Category	Category Name	Category Name	Ascending
Service Request	Service Number, Subject, First Name, Last Name	Opened Time	Descending
Task	Subject, Location	Due Date	Ascending
User	Last Name, First Name, Email	Last Name	Ascending

NOTE: Quick Search 1 and Quick Search 2 are not available for search for Custom Objects 1-3 when they are related to Account, Appointment, Contact, Lead, Opportunity, or Task.

If the Account object is a child of the Contact object, then the search fields are Account Name, Location, and Primary Contact. If the Account object is a child object of Custom Object 1, Custom Object 2, or Custom Object 3, then the search fields are Account Name and Location only. The search fields for the Account object and Custom Objects 04-15 are the same as the top-level Account object.

To use a multiple field search

- 1 While displaying a list, tap the Magnifying Glass icon (Android) or drag down on the list (iOS). The multiple field Search page appears.
- 2 For each of the search fields displayed, you can tap the Search Operator (on the left side) and choose an operator for the search, such as Equals, Contains, or Starts With.
The list of search operators depends on the field’s data type. For example, a date field can use a Between operator so you can specify a date range to search within. A numeric field has equals, greater than, and less than operators.
- 3 For each of the search fields displayed, you can enter a value to search on.
If you leave a search field blank, then that field is not used when searching. For text fields, the same wildcard and case rules apply as described in [“Search Wildcards and Case-Insensitivity” on page 45](#).
- 4 To start the search, tap Search at the top right of the page.

Finding Records Using Look Up

When you use Look Up, Oracle CRM On Demand Connected Mobile Sales looks at specific fields within each record. The fields and specifications depend on the record type. Some look ups are sorted if there are multiple records that meet the search criteria. [Table 6](#) show the look up specifications for each record type.

Table 6. Look Up Specifications by Record Type

Record Type	Search Specification	Sort Field	Sort Order
Account	Account Name STARTSWITH criteria	Account Name	Ascending
Campaign	Campaign Name STARTSWITH criteria OR Source Code STARTSWITH criteria	Campaign Name	Ascending
Contact	First Name STARTSWITH criteria OR Last Name STARTSWITH criteria	Last Name	Ascending
Custom Object 1-15	Name STARTSWITH criteria OR Quick Search 1 STARTSWITH criteria OR Quick Search 2 STARTSWITH criteria	Name	Ascending
Lead	First Name STARTSWITH criteria OR Last Name STARTSWITH criteria	Last Name	Ascending
Note	Subject STARTSWITH criteria	Modified Date	Descending
Opportunity	Opportunity Name STARTSWITH criteria	Opportunity Name	Ascending
Product	Product Name STARTSWITH criteria OR Product Category STARTSWITH criteria	Product Name	Ascending

Table 6. Look Up Specifications by Record Type

Record Type	Search Specification	Sort Field	Sort Order
Service Request	Service Number STARTSWITH criteria OR Subject STARTSWITH criteria OR Account Name STARTSWITH criteria OR Contact First Name STARTSWITH criteria OR Contact Last Name STARTSWITH criteria	Opened Time	Descending
Task	Activity SR Id EQUALS Task AND Subject STARTSWITH criteria OR Location STARTSWITH criteria	Due Date	Ascending
User/Owner	First Name STARTSWITH criteria OR Last Name STARTSWITH criteria	Last Name	Ascending

Using Detail Screens

When you select a record from a List screen, Oracle CRM On Demand Connected Mobile Sales displays the detail fields for the record. The fields displayed depend on the record type and the fields selected by the administrator. For more information, see [“Customizing Layouts” on page 22](#).

To use a Detail screen

Do one of the following:

- To edit the record, tap the Edit button in the title bar.
- (On iOS devices only) To go back to the Home screen, tap the middle of the title bar.
- To go back to the List screen, tap the Back button in the title bar.
- To make a phone call, tap the phone number. Calls are placed using the mobile device’s phone application.
- To write an email, tap the email address. Emails are composed and sent using the mobile device’s email application.
- To display a map and get directions, tap the address. Mapping and directions use the mobile device’s map application.
- To jump to a related item, tap an icon in the Related Items bar. Examples of related items are contacts related to a lead, service requests related to an account, and tasks related to a contact.
- When displaying an Account or Contact, tap Appointment or Task to create a related activity. The contact name populates automatically in the new activity.
- When displaying an account, you can display news about the account by tapping the News Feed icon in the Related Items bar at the bottom of the screen. The News Feed icon appears only if the RSS feed has been configured in Oracle CRM On Demand Release 32 or later. For more information on configuring the RSS feed, see [“Configuring the RSS Feed for Account News” on page 29](#).

- When displaying an account, you can add an appointment, add an attachment, or send email to a contact or team, or add a task by tapping and holding the menu icon (●●●).
- When creating a lead from a list of related leads in an account, the new lead's Associated Account field populates with the name of the parent account.
- When displaying an appointment, you can add an attachment or send email to contacts and users by tapping and holding the menu icon (●●●).
- When displaying a lead, you can add an appointment, add an attachment, log a call, or add a task by tapping and holding the menu icon (●●●).
- When displaying a task, you can add an attachment by tapping and holding the menu icon (●●●).
- When displaying an opportunity, you can add an appointment, attachment, or task, you can send an email to a contact or team, or log a call by tapping and holding the menu icon (●●●).

Working with Leads

Oracle CRM On Demand Connected Mobile Sales enables you to qualify, reject, archive, and convert your leads. For more information, see:

- [Qualifying Leads](#)
- [Rejecting Leads on page 51](#)
- [Archiving Leads on page 51](#)
- [Converting Leads on page 52](#)

Qualifying Leads

You can qualify leads from within Oracle CRM On Demand Connected Mobile Sales. Use the following procedure.

NOTE: To perform this procedure, your user role must include the *Qualify Leads* privilege.

To qualify leads

- 1 In Oracle CRM On Demand Connected Mobile Sales, display the detail page for a lead.
- 2 On the Lead Detail page, make sure that the lead's First Name, Last Name, Rating, and Sales Person fields contain valid values.

These fields are required to qualify the lead. In addition, if the Lead record type is configured in the user mode of record ownership, then the Owner Full Name field must contain valid values.

- 3 Tap the menu icon (●●●).
- 4 Choose Mark as Qualified.

Oracle CRM On Demand Connected Mobile Sales verifies that the critical fields contain data. If the criteria are met, the lead Status field value changes to Qualified.

If you receive an error message after clicking Mark as Qualified, verify that the Qualified Date field has not been customized with a read-only value.

Rejecting Leads

You can reject leads from within Oracle CRM On Demand Connected Mobile Sales. Use the following procedure.

NOTE: To perform this procedure, your user role must include the Reject Leads privilege.

To reject leads

- 1 In Oracle CRM On Demand Connected Mobile Sales, display the detail page for a lead.
- 2 Tap the menu icon (●●●).
- 3 Choose Reject.

Oracle CRM On Demand Connected Mobile Sales displays the Reject a Lead page.

- 4 On the Reject a Lead page, enter the following information:
 - In the Reject Code field, select a value from the drop-down list.
 - (Optional) In the Reject Reason field, enter the reason for the rejection. If the Reject Code is set to Other, then the Reject Reason field is required.
- 5 To reassign the lead to a new owner, select the Reassign Owner check box.

If your company administrator has set up lead assignment rules, then selecting the Reassign Owner check box triggers the assignment manager to reassign the lead by using the lead assignment rules. Depending on your company's policies, the rejected lead may be reassigned to the original owner or to the original owner's manager. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode.

- 6 Click Confirm Reject.

The Lead Detail page reappears with information about the rejection, including your name, Reject Code, and, if specified, the reason for the rejection. The lead Status field value is changed to Rejected.

Archiving Leads

Instead of qualifying a lead, you can specify that it is not worth pursuing and remove it from the assessment process. Archiving a lead does not delete it, but retains the lead in the database with a status of Archived. To archive a lead use the following procedure.

NOTE: To perform this procedure, your user role must include the Archive Lead privilege.

To archive leads

- 1 In Oracle CRM On Demand Connected Mobile Sales, display the detail page for a lead.
- 2 Tap the menu icon (●●●).
- 3 Choose Archive.

The lead Status field changes to Archived.

Converting Leads

You can convert qualified leads from within Oracle CRM On Demand Connected Mobile Sales in a similar manner as in Oracle CRM On Demand. You can convert leads into accounts, contacts, and opportunities. Before converting a lead, make sure it is qualified. For more information, see [“Qualifying Leads” on page 50](#).

NOTE: To perform this procedure, your user role must include the Convert Leads privilege. The destination record type (account, contact, and opportunity) must have the Has Access and Can Create check boxes selected. Your administrator must enable this feature before use. See [“Enabling Lead Conversion” on page 25](#).

To convert a lead

- 1 From the Lead detail page, tap the menu icon (●●●).
- 2 Choose Convert Lead.
- 3 To create new account and contact records for this lead, select the Auto-create New Account and Auto-create New Contact options.
- 4 To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.
- 5 Complete the remaining fields.
- 6 Tap Save.
- 7 Navigate back to the Lead detail page.

Using the Calendar

The calendar shows appointments from Oracle CRM On Demand. The appointments that you create on your mobile device are saved to Oracle CRM On Demand.

To display appointments on the calendar

Do one of the following:

- Click List to display a chronological text list of your appointments. You can scroll through this list to find appointments.

- Click Day to display one day's appointments.
You can change the displayed date, using the Previous Day and Next Day buttons.
- Click Month to display one month's appointments.
You can change the displayed month, using the Previous Month and Next Month buttons.
- Click the Today button to return to today's appointments when displaying the List, Day, or Month.
- Click the Add (+) button to add new appointments.
- Click the appointment to display the detailed information about it.
- For appointments, you can tap Select and choose between displaying Open Appointments, Completed Appointments, or All Appointments.

While viewing an appointment you can edit it and add a follow-up appointment. You can also access the related items listed at the bottom of the screen.

Creating a Follow-Up Appointment

When displaying an existing appointment, you can create a follow-up appointment. The follow-up appointment is scheduled for a week after the original appointment, but you can edit that as needed. The follow-up appointment's name starts with "Follow Up:" and then has the name of the original appointment. All fields in the original appointment are retained, except for the Description field and any attachments. To create a follow-up appointment, complete the following procedure.

To create a follow-up appointment

- 1 While displaying an existing appointment, tap the menu icon (●●●).
- 2 Choose Create Follow-up from the pop-up menu.
- 3 Edit the follow-up appointment's fields as needed.
- 4 Tap Done.

Displaying All, Completed, and Open Appointments

You can filter appointments that belong to a record type such as accounts or contacts. You can display the following types of appointments:

- **All Appointments.** Displays appointments sorted by the earliest start time first. Limited to a maximum of 25 appointments per page and no appointments older than four weeks.
- **Completed Appointments.** Displays appointments with a completed date and time earlier than the current date and time, sorted by the most recently completed appointment first. Limited to a maximum of 25 appointments.
- **Open Appointments.** Displays appointments that have yet to be completed (either the completed date is null, or it occurs in the future), sorted by the appointment that is due the soonest. Limited to a maximum of 25 appointments.

To display filtered appointments, complete the following procedure.

To display filtered appointments

- 1** In the record type (such as account or contact), tap Related Items.
- 2** Tap Appointments.
- 3** Tap the List icon.
 - a** In Android, tap the List icon at the top right of the screen, and choose Select.
 - b** In iOS, tap the Appointments icon in the bottom bar and choose Select.
- 4** In the Select page, tap either All Appointments, Completed Appointments, or Open Appointments.

The following describes some useful information about appointments:

- If the Completed Date field is left blank, Oracle CRM On Demand Connected Mobile Sales sets it to the same value as the End Time field when the appointment is created and saved.
- If the Completed Date field is not configured as a read-only field, then you can enter a date in this field that is different from the end date for the appointment.
- If you later change the value in the End Time field, then the value in the Completed Date field is also changed to the new value in the End Time field.
- Changing the date in the Completed Date field does not result in the Completed check box for the appointment being selected, or the Status field being set to Completed, even if the new date is in the past.
- The Completed Date field can never be left blank on appointments because Oracle CRM On Demand uses this field to determine which appointments to include in the Open Activities lists that appear in several areas in Oracle CRM On Demand.
- If you clear the value from the Completed Date field on an appointment, then Oracle CRM On Demand resets the field to the same value as the End Time field.

Displaying All, Completed, and Open Tasks

You can filter tasks that belong to an record type such as accounts or contacts. You can display the following types of tasks:

- **All tasks.** Displays tasks sorted by the earliest due date first. Limited to a maximum of 25 tasks.
- **Completed tasks.** Displays tasks with a completed date and time earlier than the current date and time, sorted by the most recently completed task first. Limited to a maximum of 25 tasks.
- **Open tasks.** Displays tasks that have yet to be completed (either the completed date is null, or it occurs in the future), sorted by the task that is due the soonest. Limited to a maximum of 25 tasks.

To display filtered tasks, complete the following procedure.

To display filtered tasks

- 1 In the record type (such as account or contact), tap Related Items.
- 2 Tap Tasks.
- 3 Tap the List icon.
 - a In Android, tap the List icon at the top right of the screen, and choose Select.
 - b In iOS, tap the Tasks icon in the bottom bar and choose Select.
- 4 In the Select page, tap either All Tasks, Completed Tasks, or Open Tasks.

Calendar and Contact Synchronization (iOS Only)

iOS users who sign on with a user ID and password (not SSO) can synchronize their calendars and contacts with Oracle CRM On Demand using CalDAV (Calendar Distributed Authoring and Versioning) and CardDAV (Card Distributed Authoring and Versioning). CalDAV and CardDAV are extensions to WebDAV (Web Distributed Authoring and Versioning) that provide a standard interchange of appointment and contact information with a remote server. If this is the first time a CalDAV or CardDAV entry is being set up on the device, back up your calendar and contact list because synchronization removes the contacts on your device.

NOTE: Only contacts that appear in My Contacts are synchronized. A user who signs on with SSO cannot use CalDAV or CardDAV synchronization.

To set up Calendar and Contact Synchronization on an iOS device

- 1 Navigate to Settings and then to Mail, Contacts, Calendars.
- 2 Tap Add Account.
- 3 Tap Other.
- 4 Tap Add CardDAV/CalDAV Account.
- 5 Enter the following information:

Field	Entry
Server	mobile9aaa.crmondemand.com for the staging host or mobile.crmondemand.com for the production host.
User Name	Your Oracle CRM On Demand user name
Password	Your Oracle CRM On Demand password
Description	The name for your contact or calendar list

To be able to create contacts from your iOS device and have those contacts synchronized to Oracle CRM On Demand, you must have the CardDAV entry for Oracle CRM On Demand Connected Mobile Sales set as your default Contact list.

To set your default Contact list

- 1 Navigate to Settings and then to Mail, Contacts, Calendars.
- 2 Under the Contacts section, tap Default Account.
- 3 Select the CardDAV entry for Connected Mobile Sales.

Only contacts are synchronized from Oracle CRM On Demand to the iOS device. Users are not synchronized. However, users can still be added to appointments by manually entering their email addresses that also exist in Oracle CRM On Demand. Otherwise, if there is no match for the email address in Oracle CRM On Demand, then the invitee is removed in a subsequent synchronization. Recurring appointments, alerts, and the URL field are not supported.

When adding a new appointment, use only the calendar in Oracle CRM On Demand Connected Mobile Sales. If you use your iOS device's native calendar app or a third-party calendar app, then these appointments synchronize to Oracle CRM On Demand using the CalDAV standard, which does not allow for account information. Oracle CRM On Demand rejects these appointments because they do not contain an account, and then the appointment is removed from your device's calendar app.

Finding Clients Near Your Location

You can use a map proximity search to identify accounts, activities, and contacts near your location. The search radius is configurable for 1, 5, 10, 20, or 25 kilometers or miles from your current location.

The following table lists the address type that is checked on each record type when you perform a proximity search. The latitude and longitude fields for these address types are used and are therefore mandatory for proximity searching. The actual street address information is not used. In contrast, when mapping an address from the detail page of these record types, the street address information is used, not the latitude and longitude fields.

Supported Record Type	Address Checked in Proximity Searches
Account	The shipping address for the account
Activity	The address in the Address field.
Contact	The primary address for the contact

Populating the latitude and longitude fields can be done manually or through Oracle CRM On Demand's geocoding service. For more information about the latitude and longitude fields, check the *"About Geocode Fields in the Address Record Type"* topic in *Oracle CRM On Demand Online Help*. For more information about Oracle CRM On Demand Geocoding, check the *"About the Geocoding of Address Information"* topic in *Oracle CRM On Demand Online Help*.

The following procedure describes how to set the search radius.

To set the search radius

- 1 Tap Around Me.

- 2 Tap the Radius setting and choose from 1, 5, 10, 20, or 25.
- 3 Tap the Units settings and choose either kilometers or miles.

The proximity search can be performed on accounts, activities, and contacts. The following procedure describes how to search on these record types.

To perform a proximity search

- 1 Tap Around Me.
- 2 Tap the Record Type setting and choose either accounts, activities, or contacts
- 3 Tap the List setting and choose All records or one of the record-dependent alternatives.
- 4 Tap Search.
Oracle CRM On Demand Connected Mobile Sales displays a map centered on your location (marked with a blue circle) and the nearby objects marked as red pins.
- 5 To display information on a nearby object, tap its red pin.
A pop-up appears on the map with the name and information on the object. Android devices use a list page to indicate nearby accounts, activities, and contacts.
- 6 To display a detail page on the selected object, tap the circled i icon in the information pop-up.

Using Attachments

You can attach images and voice memos to many record types. Android users can also attach documents to these record types. You can make attachments as a field for Custom Objects 1-15. The following record types support attachments as a related item (requires record type access):

- Account
- Activity - Appointment
- Activity - Task
- Contact
- Custom Object 1-3
- Lead
- Opportunity
- Service Request

NOTE: Voice memos have a limit of two minutes of recorded time.

To add an attachment

- 1 While editing an appointment or task, tap the menu icon (●●●), then tap Add Attachments. If editing a custom object, navigate to Related Objects and tap Attachments.

- 2** Click the add (+) button.
The Create page appears.
- 3** Tap Add.
- 4** In the File Type field, choose Image, Audio, or Other (Android only).
- 5** If you chose Image, then complete the following steps:
 - a** Tap the Image icon.
 - b** Choose either: Choose Photo (to choose an existing photo in your photo library) or Take Photo.
- 6** If you chose Audio, then complete the following steps:
 - a** Tap the audio (speaker) icon.
 - b** On the recording page, tap the Record button and record a voice note.
 - c** When done, tap the button to stop recording.
- 7** If you chose Other (Android only), then complete the following steps:
 - a** Tap the Other icon.
The Open From page appears.
 - b** Select the source of the document from one of the options below:
 - Recent
 - Images
 - Videos
 - Audio
 - Downloads
 - Photos
 - c** Depending on your document source, you need to navigate to the document within the Android operating system.
- 8** In the Title field, enter a name for the attachment.
When displaying a list of attachments, they are sorted by title in ascending order.
- 9** In the Description field, enter a description of the attachment.
- 10** Tap Done.

When you have one or more attachments on a record, you can review it, delete it, or share it with others. Use the following procedure to access your attachments.

To access an attachment

- 1** While editing an appointment or task, tap the menu icon (●●●), then tap Add Attachments. If editing a custom object, navigate to Related Objects and tap Attachments.
A list displaying the attachments to the selected record appears. The list is sorted by the attachment title.
- 2** To display information about an attachment, tap the attachment record.
- 3** To get the details of an attachment, tap the attachment record and then tap the information icon (i) in the pop-up. You can then do the following:
 - a** To share the attachment with someone, tap the sharing icon (upper left corner) and choose the sharing method (such as mail, message, and so on).
 - b** To display an attached image, or document, tap the image or document icon.
 - c** To play an audio recording using the device's native audio player, tap the speaker icon.
- 4** Tap Done.

Searching the Calendar for Records

You can search the calendar for specific records. When you search, Oracle CRM On Demand Connected Mobile Sales looks at specific fields within each record. The fields and search specifications depend on the record type. Some lists are sorted if there are multiple records that meet the search criteria.

Displaying Analytics Reports

You can display analytics reports from Oracle CRM On Demand as selected and configured by your administrator. These reports are subject to the following restrictions:

- The report can not contain any Flash components. If a report contains both Flash and non-Flash components, only the non-Flash components appear.
- You can not navigate to detail information (drill-down).

To display an analytics report

- 1** Tap the Reports icon.
The list of configured reports appears. The administrator configures which reports appear in this list.
- 2** Tap a report.

User Interface Differences Between Supported Devices

Oracle CRM On Demand Connected Mobile Sales provides the same functions on all supported devices. However, because these devices have differences, the manner in which these functions are implemented is specific to the device and its operating system. The following list details the major differences you might experience between devices:

- The iPad has a larger screen, enabling the use of a two-column display on detail and edit pages, as compared to a single column on the iPhone.
- The iPad can display some picklists in a floating window above the currently displayed page, whereas the iPhone must switch to a new page to present the same picklist. For example, to choose a country from a picklist, the iPad can display a floating picklist of countries, whereas the iPhone must switch to a single page listing those same countries.

Managing Advanced Screen Settings

Within the Oracle CRM On Demand Connected Mobile Sales application there is an option for Advanced Screen Settings. You do not normally need to access these settings but in the event that support directs you to the Advanced Screen Settings, the fields shown in [Table 7](#) can be set.

Table 7. Advanced Screen Settings

Field Name	Default Value	Description
Host	mobile.crmondemand.com	The Oracle CRM On Demand Connected Mobile Sales server host name.
Port	Default	The port number.
Suffix	/odui/faces/Home	The suffix used to form the URL to access Oracle CRM On Demand Connected Mobile Sales.
Use SSL	Checked	A check box to enable SSL.
URL	Not applicable	The URL generated based on the fields set above (Host, Port, Suffix, and Use SSL).

When in doubt, you can reset these fields to standard default settings.

To reset Advanced Screen Settings on an Android device

- 1 Navigate to Android Settings Application, Apps/Applications, and then Sales
- 2 Select Clear Data.

To reset Advanced Screen Settings on an iOS device

- 1 Uninstall the Oracle CRM On Demand Connected Mobile Sales application.
- 2 Reinstall the Oracle CRM On Demand Connected Mobile Sales application.

Understanding Error Messages

Table 8 describes possible error messages and their meanings.

Table 8. Error Messages

Error Message	Meaning
The record you are trying to access has been deleted or has been assigned a new owner and you no longer have access to it.	This occurs when you are trying to access a record that you do not have access to. This can occur when the ownership of the record has been assigned to another user, or because your user role no longer provides access to the record.

Index

A

- Account Address address field 22
- Account Web Applet 29
- address fields 22
- advanced screen settings 60
- all appointments 53
- all tasks 54
- analytics reports 29, 30, 59
- Android, installing 33
- Application Composer
 - about 11
 - filters 21
 - signing on 13, 14
 - user 13
 - using 11
- application usage, tracking 28
- appointments
 - displaying 53
 - follow-up 53
- Associated Account field 50
- attachments 57

B

- Billing address field 22

C

- cache, clearing 12, 26, 27
- CalDAV 55
- calendar 59
 - synchronization 55
 - using 52
- CardDAV 55
- clear cache 12, 27
- company name 42
- completed appointments 53
- completed tasks 54
- configuring
 - Oracle CRM On Demand Connected Mobile Sales 35
 - record types, fields and customizations 37
- Contact Address address field 22
- contact photos 31
- contact synchronization 55
- contacts 55
- conversion, lead enabling 25

customization

- configuring 37
- layouts 22
- resetting 27
- customizing search fields 24

D

- detail screens, using 49
- devices
 - installing 33
 - supported 10
- differences between supported devices 60

E

- encryption 43
- error messages 61

F

- fields
 - configuring 37
 - selecting 19
- filters
 - in Application Composer 21
 - view mode 22
- finding clients 56
- finding records 46, 47, 48
- follow-up appointment 53

H

- host
 - production 41
 - staging 41
- http 20
- https 21

I

- installing
 - on Android devices 33
 - on iOS devices 33
 - on mobile devices 33
- interface, about 39
- Internet connectivity 44
- iOS devices, installing 33
- IP address restrictions 38

L

layouts, customizing 22
lead 50
leads
 archiving 51
 converting 52
 enabling conversion 25
 qualifying 50
 rejecting 51
 working with 50
limitations affecting mobile devices 37
list screens, using 44
lists
 about 21
 searching 45
location 56

M

mailto 20
map 56
menu 43
mobile devices
 installing 33
 supported 10
modern theme 28
multiple field search 47

N

news feed 29, 49

O

Offline mode 27, 42, 43
open appointments 53
open tasks 54
Oracle CRM On Demand Connected Mobile
 Sales
 about 9
 configuring 35
 overview 9
 requirements 9
 signing on 40
 using 39
Oracle Enable Offline Access Profile 43
overview of Oracle CRM On Demand
 Connected Mobile Sales 9

P

password 42
password sign on 41
photos 31
privileges 35
production host 41

profile 43

R

record types
 configuring 37
 selecting 15
 using list-detail 44
reports 29, 30, 59
Reports icon 29
requirements 9
restrictions, IP address 38
RSS news feed 29

S

screen settings 60
search 24, 47, 59
search calendar 59
search fields 24
searching lists 45
security questions 42
Select Filter menu 21
selecting fields 19
selecting items 12
selecting record types 15
setting privileges 35
Shipping address field 22
Sign Out 43
signing on
 Application Composer 13, 14
 Oracle CRM On Demand Connected Mobile
 Sales 40
 single sign-on 40
 with user ID and password 41
single sign-on, signing on 40
staging host 41
supported mobile devices
 differences 60
 list 10
synchronization, calendar and contact 55

T

tasks, displaying 54
tracking application usage 28
troubleshooting 61

U

usage, tracking application 28
user ID sign-on 41
user name 42

V

V2 Analytics 30

V3 Analytics 30
view mode filters 22
visibility level 21

W

Web links 20
Web services Utilization 28
Work Offline 43

