Oracle

Sales Cloud
Using Retail Execution Mobile

Release 12
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Can I perform a store visit task while viewing the guided store visit tasks?
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Why can’t I view the activities?
Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon ? to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon ? in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

• Community: Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.

• Guides and Videos: Go to the Oracle Help Center to find guides and videos.

• Training: Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About this Guide

Audience and Scope

This guide is intended for users who are involved in setting up and using the Consumer Goods Mobile Application. With a task-based approach, this guide serves as a ready reference to all the everyday tasks that you need to perform on the application.

Related Guides

Refer to the following related guides for detailed information on the Consumer Goods business flows and functionality.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud - Getting Started with Consumer Goods Implementation</td>
<td>Describes how to set up and configure Oracle Sales Cloud for Consumer Goods either while implementing or after implementing Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Using Sales for Consumer Goods</td>
<td>Describes the business flows and functionality in retail execution and trade promotion execution areas and how you can perform your day-to-day operations in these areas.</td>
</tr>
<tr>
<td>Oracle Sales Cloud - Customizing Sales Guide</td>
<td>Provides instructions on extending the mobile pages.</td>
</tr>
<tr>
<td>Integrating Retail Execution Mobile Direct-Store-Delivery (2298430. 1) on My Oracle Support at <a href="http://supportoracle.com/">http://supportoracle.com/</a></td>
<td>Provides information on how you can integrate back end systems such as supply chain, accounting, or order management systems with the Direct-Store-Delivery (DSD) processes in Oracle Customer Experience (CX) Retail Execution Mobile.</td>
</tr>
</tbody>
</table>

Related Topics

- Integrating Retail Execution Mobile Direct-Store-Delivery
- Oracle Help Center
2 Overview

Oracle CX Retail Execution Mobile: Overview

Use the Oracle Customer Experience Retail Execution Mobile application to track, update, and perform your store visit activities while on the move and get a 360 degree view of your account.

As a sales representative, you can use the application to perform the following key activities:

- Work in offline or disconnected mode
- Track your activities and plan your day
- Manage your in-store activities and supporting activities for a store visit.
- Explore the demo mode
- Use Oracle Social Network
- Use Analytics
- Use Dashboard

To use the Direct Store Delivery processes you must integrate them with your back end systems such as supply chain, accounting, or order management systems. When fully integrated, you can perform, track, measure, and manage your transactions at each stage of the delivery process, starting from checking your appointments to completing your visits, for better business results.

Note: For more information on the Direct Store Delivery flows available for integration in the Oracle CX Retail Execution Mobile Application, refer to the Integrating Retail Execution Mobile Direct-Store-Delivery (2298430.1) on My Oracle Support at https://support.oracle.com. Direct Store Delivery enables your sales team to deliver goods directly for your customers using Oracle CX Retail Execution Mobile.

Related Topics
- Installing Oracle CX Retail Execution Mobile
- Configuring Profile Options in Oracle CX Retail Execution Mobile
- Integrating Retail Execution Mobile Direct-Store-Delivery

Working in Offline or Disconnected Mode

Using the consumer goods mobile application, you can continue to work on your tasks in disconnected or offline mode ensuring business continuity. The application stores all the data offline irrespective of it being in the connected or disconnected mode. The application sends the stored data to the server from the offline transaction queue only when the data is synchronized from the pending sync queue. On connecting to the network, you can synchronize with the server to push the offline transactions to the server and download the refreshed data on your device.

To enable offline or disconnected mode tap Settings from shuttle menu and tap Offline.

Note: Oracle Social Network, Analytics, and map view of near by accounts are only available in online mode.
Managing In-Store and Other Supporting Activities for a Store Visit

You can manage your in-store activities and supporting activities for a store visit.

Managing in-store activities

The sales representative can prepare for the day with a list of store visit appointments and a 360 view of accounts. The device facilitates store visits with a guided tasks list without a route and appointment check-in. The following in-store activities can be performed:

- **Inventory Audit**: Perform inventory audits to update shelf stock, placement, and so on.
- **Account and Promotion Compliance Audit Surveys**: Capture entries for accounts and promotions using surveys.
- **Promotion Presentation**: Present promotions at the retail stores and add the promotions to the shopping cart to enhance sales.
- **Order Delivery**: You can deliver shipments for orders and collect payments, print receipts, and so on.

Managing supporting activities

Use the Shuttle Menu to get a quick view of the features that you can use in your application without having to check in to a route or an appointment. You can perform pending sync, edit the settings, view My Inventory, route, dashboard, and so on. Some of the key supporting activities that you can perform for an appointment are:

- **Shopping Cart**: Order products, view order history, order details, and capture signature for orders.
- **Notes**: Capture notes using speech for follow-up details of the store.
- **Photos**: Take pictures on the move to support in-store tasks and promotion activities besides using automated store binders and attachments.
- **Product Assortments**: Use product assortments to leverage your sales.
- **Store Binders**: You can use store binders to view marketing content.

**Related Topics**

- Checking In to a Store Visit in Oracle Customer Experience Retail Execution Mobile
- Selecting and Performing Store Visit Tasks in Oracle Customer Experience Retail Execution Mobile
- Can I perform a store visit task while viewing the guided store visit tasks in the mobile or tablet application?
- How can I continue my store visit after I navigate away from the Appointment List page in the mobile or tablet application?
Exploring Demo Mode

View a demo mode of the application to familiarize yourself with the application even when the server is unreachable. Using the demo mode you can view the store visit tasks, notes, photos, surveys, shopping cart and orders related tasks.

To view the demo mode:

1. Navigate to the sign in page.
2. Tap Demo mode.

Using Oracle Social Network

Use Oracle Social Network to facilitate real-time collaboration with the other sales representatives and leverage the networking tool.

To use Oracle Social Network, tap Social from the Shuttle menu. This launches the Oracle Social Network for you to collaborate.

⚠️ **Note:** Social is only available in online mode. For more information on Enabling Oracle Social Network, refer to the Oracle Sales Cloud Getting Started with Consumer Goods Implementation

Using Analytics and Dashboard

Use Analytics page to view related BI reports for the retail account as a part of your store visit. You can access your favorite analytics reports and search the reports from the BI Catalog. The sales representative can view the business intelligence reports on the configurable home page to analyze their performance vis-a-vis the retail sales and promotions and take appropriate action from the Shuttle Menu.

Using Analytics

Tap Analytics from the Shuttle menu to launch Analytics screen. You can also use Analytics subtab available for Activities, Accounts, Promotions, Routes, Product Assortments, and Credit Lines.

⚠️ **Note:** Analytics is only available in online mode. For more information on Enabling Analytics, refer to the Oracle Sales Cloud Getting Started with Consumer Goods Implementation

Using Dashboard

The following reports can be configured to be displayed on the Dashboard page:

- **Sales vs. Target**: shows a summary of closed opportunities compared with the quota for the current quarter.
- **Visits vs Target**: shows the number of scheduled store visits compared with completed store visits and the related gap in the current quarter.
• **In-flight Promotions**: shows the number of promotions and the total order amount originated from promotions in the current quarter.

• **Sales Trend**: shows the total number of orders and the total order amount for the current quarter.

• **Accounts**: shows the number of managed accounts and the accounts that have met per-account sales targets for the current month.

• **Eligible Promotions**: shows the number of active promotions in a quarter.

**Related Topics**

• Enabling Analytics and Oracle Social Network for Oracle Customer Experience Retail Execution Mobile
3 Getting Started

Installing Oracle CX Retail Execution Mobile

Use this topic to understand how to install Oracle CX Retail Execution Mobile.

Software Requirements

Supported Operating System versions:

- Android 5.1 or later
- iOS (for supported versions, see http://www.oracle.com/technetwork/developer-tools/maf/documentation/maf233certmatrix-3319887.html)
- Windows

Note: Your mobile device meets Sales Mobile system requirements. For System Requirements for Oracle Applications Cloud, see: http://www.oracle.com/us/products/system-requirements/overview/index.html

Installing the Application

To install the application:

1. Download the application from the Google Play store or Apple Store.
2. On the End User License Agreement screen, tap Agree.
3. Enter the Host information.

Note: To find your Host name:

1. Sign in to Oracle Sales Cloud and go to the accounts page or contacts page.
2. View your browser address line.
3. The host name for your company’s Sales Cloud Consumer Goods instance is the part after the https:// to the next slash (/). For example: If the URL is https://fap001-crm.oracle.com/customer/faces/CrmFusionHome, then your host name is fap001-crm.oracle.com.

Related Topics

- Prerequisites for Setting Up Oracle CX Retail Execution Mobile: Explained
- Configuring Profile Options in Oracle CX Retail Execution Mobile
Signing into Oracle CX Retail Execution Mobile

Use this topic to understand how to sign into Oracle CX Retail Execution Mobile.

〉 Note: You can view the Oracle CX Retail Execution Mobile application in your preferred language and local time zone by navigating to advanced settings and disabling the automatic settings.

To sign in:

1. Tap to open the application.
2. Enter Host and proceed.
3. Enter your Oracle Sales Cloud user name and password.
4. Tap **Sign In**.

〉 Note: Enter your Oracle Policy Automation hub user name and password by navigating to the Settings menu.

**Related Topics**

- Finding Your Company’s Host URL for Oracle Sales Cloud Mobile: Worked Example

Understanding Application Settings

To modify settings for your application, tap **Settings** from the Shuttle menu. You can also navigate to Settings page from login screen by tapping **Settings** icon.

The available settings parameters for the application are:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Host</td>
<td>Host name of your Oracle Sales Cloud server. For more information about finding your host name, see Installing the Application section.</td>
</tr>
<tr>
<td>Port</td>
<td>Port number of your Oracle Sales Cloud server</td>
</tr>
<tr>
<td>BI Host</td>
<td>BI Host name to support BI dashboard and analytics</td>
</tr>
<tr>
<td>BI Port</td>
<td>BI Port number</td>
</tr>
<tr>
<td>OPA User Name</td>
<td>User Name for Oracle Policy Automation Hub</td>
</tr>
<tr>
<td>OPA Password</td>
<td>Password for your Oracle Policy Automation Hub</td>
</tr>
<tr>
<td>Use SSL</td>
<td>Tap to enable or disable SSL</td>
</tr>
<tr>
<td>Offline Notification</td>
<td>Tap to enable or disable notifications while you are offline</td>
</tr>
</tbody>
</table>
### Performing Synchronization

Sync and refresh the cached data on the mobile application with the server. The application automatically synchronizes your device with the server upon first sign-in. You can also perform synchronization whenever needed to sync their changes.

> **Note:** After the first sign-in, the application synchronizes itself every 24 hrs.

### Managing Pending Sync Queue

Use the pending sync queue to view and synchronize the pending items.

To view and synchronize items:

1. Open the Shuttle page and tap **Pending Sync Items**.
2. Do one of the following as required:
   - Tap **Upload**, to sync offline transactions to the server.
   - Tap **Sync**, to upload pending transactions to the server and download data from the server.
   - Tap **Export All**, to open the local E-mail client and attach a .csv file with the offline transactions in the pending queue.

### Troubleshooting Synchronization

Pending Sync queue also contains transactions that fail during synchronization process. These failed transactions are synchronized again during the next sync event. If the transaction fails to synchronize for three consecutive times, the user is prompted to export the transaction before the **Upload** or **Sync** processes can be executed again.
4 Managing Routes

Downloading Routes

To enable a retail store visit, the sales representative must accept the route to view route details and the set of appointments associated to it. If the Route Auto-download is disabled, the sales administrator must first download the routes to the device.

Note:
- For the sales administrator to download routes manually, the profile option for ROUTE_AUTO_DOWNLOAD must be set to False. If the auto download option is set to True, the routes will be auto downloaded to the device. For more information on enabling route download, refer to the Getting Started with the Consumer Goods Implementation guide.
- The sales administrator must have the ZEM_ALLOW_PRIVILEGED_ACCESS privilege to download routes.

If the automatic download is not enabled, you must perform the following steps to download routes to the device:

1. Sign in as a sales administrator.
2. On your landing page, select your route from the list of routes or search for the route using the search box and drill down on the route.
3. Tap Download.
4. When the route download is complete, sign out of the application.

Related Topics
- Configuring Profile Options in Oracle CX Retail Execution Mobile
- Settling Route Inventories in Oracle Sales Cloud for Consumer Goods

Checking In and Checking Out of Routes

Sales representatives must accept and start a route to check in to an appointment and check out of the appointment after the completion of all the appointments associated to the route.

The route check and check out feature enables you to capture the start time and end time of a store visit. The latitude and longitude of the location during check in and check out are also recorded.

Route Check In

To perform route check in:

1. Sign in as the sales representative.
2. On the Route Details page, view the downloaded route.
3. Tap Accept to accept a route. After you Accept a route, you can navigate to the Appointment List page to review your appointments for the day.

Note: You must first Accept and Start the route to check into the appointments.
4. Now tap **Start** to begin a route by checking into a route.

Your current date, time and geo-location are captured in the application when the route is started.

**Route Check Out**

To perform route check out, tap **Finish** on the Landing page. Once the route check out is completed, the all the current date, time and your geo-location are captured.

You must ensure that all the appointments for the route have been completed to check out of a route.

**Related Topics**

- Configuring Profile Options in Oracle CX Retail Execution Mobile
- Settling Route Inventories in Oracle Sales Cloud for Consumer Goods
Chapter 5

5 Working with Accounts, Appointments, and Store Visit Tasks

Working with Accounts

Get a wholesome view of your account and prepare for your store visit. Find eligible promotions, order and visit history, and store binders in the form of tiles.

If you are using the tablet device, you can also update accounts and manage related contacts for the account.

To view your account:

1. Sign in as a sales representative.
2. Navigate to the Shuttle page.
3. Tap Calendar from the Shuttle menu and select the appointment you want to view. Drill down to an appointment on the Appointment List page to view an account profile.
4. View your account specific details like primary contact, address and other details in the form of tiles.

Your following account details are displayed in the form of tiles:

<table>
<thead>
<tr>
<th>Account Details</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligible Promotions</td>
<td>Shows a count of active promotions for the account for upcoming 90 days.</td>
</tr>
<tr>
<td>Order History</td>
<td>Shows a count of orders for the account and the sum of all the orders.</td>
</tr>
<tr>
<td>View History</td>
<td>Shows the count of completed appointments for the last 90 days.</td>
</tr>
<tr>
<td>Store Binders</td>
<td>Shows a list of store binder attachments for promotion presentations and so on.</td>
</tr>
</tbody>
</table>

Updating Accounts

You can update account details using following steps:

1. Sign in to the Application as a Sales Representative.
2. Navigate to Route Summary tab.
3. Tap the account listed for that route to view account information.
4. Tap Edit icon.
5. On the Edit Account page, you can update Account Name, Primary Contact, Owner, URL, and Address related information.
6. Tap Save to save your changes.

Managing Account’s Contacts

You can create, edit, or delete contacts associated with an account.
To create a new contact, navigate to Contacts tab on the Account detail page and tap **Create** icon.

To edit an existing contact, navigate to Contacts tab from Accounts page and tap the contact to edit. This takes you to Contact details page. Tap **Edit** icon to edit the contact.

To delete an existing contact, navigate to Contacts tab from Accounts page. On the Contacts list page, swipe left to delete a contact.

### Viewing Nearby Accounts on the Map

Use this topic to understand how to view your accounts for a route in a map.

After you start your route, from the appointments list page, click **Actions** menu and select **View in Map** to open the map view of all your accounts on the route.

Once on the map, click any account pin to view more information about the account’s location. Click **Get Directions** to find directions to the selected account from your current location. Click **Go** to start the navigation.

### Managing Appointments

As the sales representative, you can view, create, and edit appointments associated with the route at any point after the sales administrator downloads the route to the device. You can also create follow-up appointments based on any existing appointment.

Once you accept and start the route, you are directed to the calendar page, where you can view the list of appointments associated with the route, on the appointments subtab.

**Note:** For tablet devices, tap Calendar from the Shuttle menu to view appointments.

To create an appointment,

1. Sign in as a sales representative.
2. Tap **Actions** menu from the appointments subtab and select **Create Appointment**.
3. Fill up required information such as **Name**, **Location**, **Start Date**, **End Date**, and **Description**.
4. Tap **Account Name** to select the account from the list of available accounts. You can only see accounts for which information was downloaded during the route download. If you require to select account that is not available in the list, use search option.

   **Note:** The offline mode on your device is automatically disabled, for accounts search option. Once you select the account, the offline mode is enabled again.
   - **Owner** is set to logged in user.
   - **Store Visit** is set to Y and can only be changed from the web application.
   - **Visit Status** is set to Not Started.
5. Tap **Save**.
6. Tap **Pending Sync** from the Shuttle menu. From Actions menu, tap **Sync**.

You can view the appointment that you credited on the appointments list subtab.
Chapter 5

Working with Accounts, Appointments, and Store Visit Tasks

Note: You must associate store visit type to the newly created appointment using consumer goods web application, to view the store visit tasks on the mobile or tablet device.

To edit any appointment, tap the appointment name to view the details and tap Edit Appointment from Actions menu.

You can also create a follow-up appointment based on any existing appointment. There are two ways to do so:

Note: The start date and end date for the follow-up appointments are set at a two weeks from the dates of the existing appointment.

1. From the appointment details view:
   a. On the appointments list subtab, tap appointment name to go to its detailed view.
   b. From the Actions menu, tap Create Follow-Up.

2. From the check-in subtab:
   a. On the appointments list subtab, check in to an appointment.
   b. On the tasks list page, tap Create Follow-Up from Actions menu.

Related Topics
- How can I continue my store visit after I navigate away from the Appointment List page in the mobile or tablet application?
- Can I reschedule an appointment in the mobile or tablet application?
- Why can’t I view the activities?

Checking In to a Store Visit

You can start your day by reviewing your appointments for the day on the landing page of the application after you sign in. You must accept and start a route to check into an appointment.

To check in:
1. Sign in as a sales representative.
2. Tap Accept and Start the route on the Landing page.
3. After checking into a route, tap Appointments subtab on the Landing page.
4. On the Appointments list page, expand the appointment you want to take up and tap Check In. This logs the time and your geo-coordinates.
5. Navigate to the Tasks list page to select the in-store activities to perform.

Selecting and Performing Store Visit Tasks

View and perform your store visit tasks for your appointments.

To view guided store visit tasks list, the sales representative can tap the Appointments subtab on the Landing page at any point after signing in.
To perform the store visit tasks:

1. Sign in as a sales representative.
2. On the Landing page, Tap *Accept* followed by *Start*.
3. After checking into a route, tap Appointments subtab on the Landing page.
4. On the Appointments list page, on your required appointment card, tap *Check In*.
   The Tasks List page appears, where you can view your store visit tasks list.
5. Choose from the following standard store visit tasks to perform:
   - Inventory Audit
   - Survey
   - Promotion Presentation
   - Promotion Compliance Audit
   - Order Delivery

**Related Topics**
- Delivering Shipments in Oracle Sales Cloud for Consumer Goods Mobile
- Performing Surveys in Oracle Customer Experience Retail Execution Mobile
- Performing Inventory Audit in Oracle Customer Experience Retail Execution Mobile
- Can I perform a store visit task while viewing the guided store visit tasks in the mobile or tablet application?
- Why can’t I view the activities?

**Managing Notes**

Create notes to add any additional information about your retail visit that you might need to record. Once a note is created, it gets attached to the appointment associated with the account. You can thereafter create, edit or delete your note to store all the information associated with your account.

To create, edit, or delete notes:

1. Sign in as a sales representative.
2. Tap *Accept* and *Start* on the Landing page.
3. On the Landing page, tap the Appointments subtab. On the Appointment List page, tap Check In into an appointment card.
4. On the Tasks List page, select the Notes subtab.
5. To create a note, tap the *Plus* icon.
6. To edit a note, swipe and tap *Edit*.
7. To delete a note, tap *Delete* from the Actions menu.
8. Tap *Save*.

**Related Topics**
- Do I have to check in to an appointment every time I want to create or edit notes in the mobile or tablet application?
Managing Photos

View, take, edit, or delete a photo while performing your store visit activities. Managing photos enables you to support your in-store activities.

To view, take, edit, or delete a photo:

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route and then **Start** route.
3. After checking into a route, tap **Appointments** subtab on the Landing page.
4. On the Appointments List page, tap **Check In** to an appointment card.
5. Once you are navigated to the Tasks List page, tap the photo subtab to view photos and their details.
6. Tap the plus icon to open the Actions menu. From the Actions menu,
   - Tap **Take Photo**, to take a photo.
   - Tap **Photo Library**, to add a photo from the photo library.
   - Tap **Edit** after selecting a photo, to edit a photo.
   - Tap **Delete** from the **Actions** menu, to delete an existing photo.
7. Tap **Save**.

**Related Topics**
- Can I edit photos for a store visit without checking into an appointment in the mobile or tablet application?

Managing Display Locations

Having an effective display location on the shelf can help product reach its full sales potential. So, managing product display locations is an important store visit task. Use this topic to understand how to view and manage display locations that are available in the store during your store visit.

Sales administrator can create display locations using consumer goods web application. Sales representative, when performing store visit tasks, may make necessary changes or create new display locations as per requirements.

To view or edit available display locations,

1. Sign in as a sales representative.
2. Check In to an appointment.
3. Tap **Display Locations** subtab.
   - You can view the list of all the available display locations for the store on this page.
4. Tap a display location to view the details about this display location, such as display size, location in store, start and end dates.
5. Tap **Inventory** subtab to view products associated with this display location.
6. Tap **Photos** subtab to view or manage photos for this display location.

To create a display location,

1. Tap **Plus (+)** icon on the Display **Locations** subtab.
2. Fill in required details for the location.
3. Tap Save.

To delete an existing display location, swipe left on the display location and tap Delete icon.

You can also associate a display location using account inventory. For more details, see Performing Inventory Audits in the Related Topics section.

**Related Topics**

- Performing Inventory Audit in Oracle Customer Experience Retail Execution Mobile
6 Performing Inventory Audits

Performing Inventory Audit

Use inventory audits to take a stock of your inventory, shelf stock, facing, and out of stock products. During your inventory audit store visit task, you can also edit the placement, images, and other details.

To perform an inventory audit:

1. Sign in as a sales representative.
2. Tap **Accept** followed by **Start** to perform route check in.
3. On the Landing page, tap the Appointments subtab.
4. Tap **Check In** on an appointment to navigate to the Tasks List page and then tap **Inventory Audit**.

**Note:** To view location-specific products, filter the inventory list by location.

5. Navigate to the Details page by drilling down on a product.
6. Edit product details like out of stock, shelf stock, facing, location, photos, and so on, depending on your business requirement.
7. To restock on products that are low in quantity, Tap **Add to Cart** to add them to the shopping cart.
7 Managing Surveys

Performing Surveys

Use this topic to understand how to perform account and promotion surveys as part of your store visit tasks.

Prerequisites for Setting Up Surveys Using Oracle Policy Automation

Following are the prerequisites before you begin working with surveys:

1. Author account survey and promotion compliance audit surveys in Oracle Policy Automation using Oracle Policy Modeler.

   Note: Ensure that you are using Oracle Policy Modeler version 12.2.4 and to download it following the instructions given in the Install Policy Modeling section in the Policy Modeling User guide:
   Default.htm#Guides/Policy_Modeling_User_Guide/Install_OPM/Install_OPM.htm

2. Use the Oracle Policy Automation command line administration tool to deploy the policy model to the Oracle Policy Automation hub, as this cannot be done from Oracle Policy Modeler.


3. Create a record of the survey using the same name used during the creation in Oracle Policy Automation and associate the survey with the account. For more information see chapter on Managing Surveys in the Using Sales for Consumer Goods guide.

Signing in to Oracle Policy Automation Hub

To execute account survey, enter your Oracle Policy Automation hub credentials when you sign in to enable download of survey templates.

To sign in to the Oracle Policy Automation hub:

1. Sign in as a sales representative.
2. Tap Settings, from the Shuttle menu.
3. On the Settings page, enter your Oracle Policy Automation user name and password as given by your sales administrator.
4. Click Save.

After user authentication, the Oracle Policy Automation survey templates are downloaded directly from the hub.
Performing Account Surveys

Run account surveys to get an insight on product performance in a store, product placement, customer feedback, and so on.

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route followed by **Start** route.
3. On the Landing page, tap the Appointments subtab.
4. Tap **Check In** on an appointment card on the Appointments List page.
5. On the Tasks List page, Tap **Surveys**.
6. The lists of account surveys available for an account are displayed.
7. Tap a survey to drill down and view its details.
8. Fill your responses for the survey and click **Save** to save the response.
9. To edit the survey, tap **Edit**.
10. On the Tasks List page, select **Survey**, to mark the task as complete.

Performing Promotion Compliance Audit Surveys

Verify the promotion compliance audit status to ensure effective promotion execution and compliance at the store by responding to the questions and saving the responses.

To execute promotion compliance audits, enter your Oracle Policy Automation hub credentials when you sign in to enable download of the templates.

- **Note:** For more information about signing in to the Oracle Policy Automation hub, refer to the Using Guide for Consumer Goods Mobile Application.

To carry out promotion compliance audit:

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route followed by **Start** route.
3. On the Landing page, tap the Appointments subtab.
4. Tap **Check In** to an appointment.
5. Select **Promotion Compliance Audit** task on the Tasks page.
6. The lists of promotion compliance audit surveys for an account are displayed.
7. Tap a survey to drill down and view its details.
8. Fill your responses for the survey and click **Save and Close**.
9. To edit the survey, tap **Edit**.

- **Note:** Saving a survey writes the results to the survey history for the associated account. The last response for a survey is visible on the survey history.
Managing Product Assortments

Viewing Product Assortments

View the account product assortments to sell priority products to the retail stores.

The product assortments are centrally planned and rolled out to retail accounts. A product assortment consists of a list of products that the manufacturer wants the sales representative to sell to the retail accounts. The sales representative must view these products to support their selling effort. Assortment is specific products being tied to a retail account.

You can navigate to the product assortments from either the Tasks List page or the Account Details page.

1. Sign as the sales representative.
2. On the Landing page, tap **Accept** route and then **Start** route.
3. After checking into a route, tap the Appointments subtab on the Landing page.
4. On the Appointments List page, tap **Check in** to an appointment card. On the Tasks List page, tap the Product Assortments subtab.
5. View the list of products in the assortment and their attributes such as SKU, UOM, recommended facing, delist date, and so on.

**Note:** To create a product assortment, associate the product assortment to an account and update product fields sellable, UOM and so on, refer to the Using Sales for Consumer Goods Guide.

Related Topics

- Managing Priority Products
9 Managing Orders and Shopping Cart

Understanding Order Statuses

View your orders or create one during your visit to the retail store. An order can have any of the following statuses.

<table>
<thead>
<tr>
<th>Order Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>An order has been created but not synced to the server.</td>
</tr>
<tr>
<td>Submitted</td>
<td>An open order has been synced to the server.</td>
</tr>
<tr>
<td>Booked</td>
<td>A submitted order has been approved.</td>
</tr>
<tr>
<td>Delivered or Partially Delivered</td>
<td>A booked order has either been delivered fully or in parts.</td>
</tr>
<tr>
<td>Canceled</td>
<td>An order has been canceled because a product is either out-of-stock or unsellable.</td>
</tr>
</tbody>
</table>

Note: Only orders in the open, booked, or submitted status can be canceled.

| Returned                  | A return order has been placed for a delivered product because of reasons such as damage, change in requirement, dissatisfaction with service, and so on. |

Managing Shopping Carts and Creating Orders

You can create a shopping cart, and populate it with products and submit it to create orders.

You can add following items to the shopping cart:

- Inventory items from the Inventory Audit page
- Promotions from the Promotions details page
- Products by searching and selecting products from the Shipping Cart page

The product selection page first lists the priority products, followed by the regular products. It also displays the priority groups that are configured in the priority portfolio associated with the account. Priority Portfolio for an account consists of a number of product groups that are displayed on the Priority Group section on the Products page.

To add products to the shopping cart and create an order:

1. Sign in as the sales representative.
2. On the Landing page, tap Accept route and then Start route.
3. After checking into a route, tap the Appointments subtab on the Landing page.
4. On the Appointments List page, tap **Check in** to an appointment card.
5. On the Tasks List page, tap the Shopping Cart icon.

   The shopping cart initially contains products and quantities from the shopping cart template, if a template has been configured and associated to the account.
6. Select and add the products to the shopping cart as per your requirement.

   Update the quantities as per your requirements.
7. To add products from specific priority groups,
   a. Tap **Priority Groups**.
   b. Select the priority group to add all the products in that group. Alternatively, you can also drill down into a group and select limited number of products from the group.
8. Once the shopping cart is updated, click **Submit** to create an order.

   ☏ **Note:** Only if an account has an associated assortment, the priority products for the account are listed.

**Related Topics**
- Managing Priority Products

### Creating, Editing, and Canceling Orders

View, create, update or delete an order through the shopping cart during your store visit appointment. The shopping cart lists all the products that must be ordered. Additionally, you can get the store managers to sign the order so that you can submit it with their authorization along with the captured signature saved with the order.

From a shopping cart, you can create multiple orders as orders are grouped by their legal entity. If the products in the cart do not have legal entity association then a single order will be generated for the products. For more information on adding products to shopping cart and creating orders, see Managing Shopping Carts and Creating Orders.

### Updating Orders

To view order details created in the mobile application as well as orders downloaded from the server,

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route and then **Start** route.
3. After checking into a route, tap Appointments subtab on the Landing page.
4. Tap **Check In** and navigate to the Orders subtab from the Tasks List page.
5. Filter and view your order list by **Orders pending delivery** or **Recent orders**.
6. Tap any order row and then tap the Summary tab to view the Order Details page.

To edit an order, tap the **Edit** icon for an order on the Order Details page.

   ☏ **Note:** Only orders in the open and booked status can be edited.

To cancel an order:

1. Navigate to the Orders subtab and to the Order Details page.
2. Tap **Cancel** from the Actions Menu in the Orders List page.
3. Select the reason for cancellation and other relevant details.
4. Tap **Submit** to cancel the order.

Only orders in the open, booked or submitted status can be canceled.

Returing Products and Containers

Use this topic to understand how to return products and empty containers for liquid beverages.

Returning Products

You can create a return order for products that are to be returned, from the Orders subtab.

To return products:

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route and then **Start** route.
3. After checking into a route, tap Appointments subtab on the Landing page.
4. Tap **Check In** and navigate to the Orders subtab from the Tasks List page.
5. Tap **Return Products** from the Actions Menu in the Orders List page.
6. Search and add products to the return order and specify the quantity to be returned for each product.

**Note:** When you add products to return order, corresponding containers also get added and the count of loaned containers is also adjusted.

7. Select the reason for return and enter other relevant details.
8. Enable **Issue Store Credit** switch if you want to issue store credit for the products as per the list price.
9. Save to create a return order
10. Tap **Submit** to create a return order.

Returning Empty Containers

You can return empty containers from Containers subtab.

On the Containers subtab,

1. Tap **Return Containers** from **Actions** menu.
2. Tap **Plus (+)** icon on the Containers region to select and add one or more containers to return.
3. Adjust the quantity of the containers to be returned once they are added.
4. Tap **Order**.

Loaned containers count is adjusted based on the number of containers returned.

Related Topics

- Using Returnable Containers: Example
- Managing Returnable Containers
Managing Promotions

Working with Promotions

Manage trade promotions such as discount vouchers, freebies, off-season offers, and so on, to increase your product sales. There are multiple discount types offered as part of the consumer goods industry solution.

The following discount types are offered:

- **Fixed Discount**: A fixed monetary amount or percentage applied to participating products.
- **Fixed Combination**: Fixed Combinations are groups of SKUs bundled together and sold together and cannot be altered by the sales representative, the only information the sales representative provides is the number of fixed combos a customer is purchasing.
- **Dynamic Combination**: Dynamic Combinations are groups of SKUs bundled together and have some fixed items and some variable items that the sales representative can select at the time of the sale. Dynamic combination promotion is categorized into dynamic combination and rebate discount. Rebate discount gives benefit to customers who meet the objective of a determined number of items bought.
- **Volume Discount**: Volume discount is based on the volume of purchase made. Volume discount has two types of discounts: Stair and Step. The Stair discount sets a percentage or monetary amount of discount to be applied to a product according to the number of items of that product the customer buys. Whereas in step discount the discount is valid only on a specified range.

Same SKU can be added to the shopping cart more than once, provided the discount is different.

> **Note**: For fixed promotions, the promotions marked as mandatory are automatically added to the shopping cart when check-in is clicked.

Viewing Promotional Content

Before you present your promotions, you can view the marketing and promotional content for an account.

To view promotions marketing content before presenting promotions:

1. Sign in as a sales representative.
2. Tap the Appointments subtab on the Landing page.
3. Tap an appointment for which you want to view the marketing documents.
4. Select the Store Binders subtab on the Tasks List page.
5. On the Promotions List page, tap the promotion to view its promotion marketing content.

Presenting Promotions

You present promotions as part of your store visit tasks. You can present the new promotions to the store manager which has been optimized for the retail store.

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route followed by **Start** route.
3. Tap the Appointments subtab on the Landing page.
4. Tap **Check In** on an appointment card on the Appointments List page.
5. On the Task List page, tap **Promotion Presentation**.
6. Drill down into a new promotion you plan to present to the store manager.

**Adding Promotions**

After your discussion with the store managers regarding the promotions you have to offer and their approval, you can specify the quantity and add the promotions to the shopping cart.

To add promotions to the shopping cart:

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route followed by **Start** route.
3. After checking into a route, tap Appointments subtab on the Landing page.
4. Tap **Check In** on an appointment card on the Appointments List page.
5. On the Task List page, tap **Promotion Presentation** on the Tasks List page.
6. On the Promotions List page, view a list of active promotion types.
7. Select the promotion type and edit the relevant fields from the following discount types available:
   - Fixed discount
   - Fixed Combination
   - Dynamic Combination
   - Volume Discount
8. Tap the product, to navigate to the Promotion Product Details page.
9. Update the quantity and the eligible item discount of the promotion.
10. Tap **Add to Cart** to add the updated list of promotion items to your shopping cart after making changes to individual items in a promotion.
11. To add an increased count of a promotion without making changes to individual items in it or to add all the products in a promotion with the specified quantity, tap **Add All to Cart**.

**Note:** Ensure that the discounts for the promotions have been applied correctly before submitting the shopping cart.
Managing Order Deliveries

Delivering Shipments

You perform order delivery as part of your store visit tasks. After you submit an order, the order will be processed by ERP and product shipments will be created to deliver the orders. You can deliver the shipments generated for the order to the retail stores.

After you are finished with delivering your shipment, invoice is generated and you can collect payment for it.

To deliver shipments:

1. Sign in as the sales representative.
2. On the Landing page, tap **Accept** followed by **Start** to perform route check in.
3. After checking into a route, tap the Appointments subtab on the Landing page.
4. Tap **Check In** on the Appointments List page.
5. On the Appointments List page, tap **Order Delivery** from the list of store visit tasks.
6. View the list of shipments generated from the order to be delivered to the store and tap a shipment to drill down into its details to confirm with the store manager.
7. Tap **Deliver**.
   
   Verify the items of the shipments with the store manager and collect the store manager’s signature for the delivery invoice.
8. Tap **Submit** to submit the delivery.

**Note:** A product delivered as a part of the shipment can be related to a container. If the number of loaned containers for the selected products exceeds the maximum allowed limit, you must return the containers or pay for the additional ones. You can return the containers from Containers subtab. If you choose to pay for the additional containers, they are added to the invoice that is generated.

Once the invoice gets generated, you can print the invoice for collecting the payment for it.

Managing Order Invoices

View your order invoices from the Invoices subtab Tasks List page, after the delivery of a shipment to collect payment for the delivery, from the Check-in page.

To print the order invoice:

- After submitting the shipment delivery, review the order invoice.
  
  Alternatively, you can open your invoice from the Invoices subtab on Task List page.
- From Actions menu, tap **Print** to generate a .pdf file for the invoice on your mobile.

  Use the print functionality provided by your PDF Viewer to print the document.
Note: Additionally, after delivering a shipment, at any point you can go back to reviewing and printing your order invoice to enable collection of payment by navigating to the Invoices subtab from the Tasks List page. Select an invoice to drill down and tap Print from the Actions Menu to print the invoice.

Managing Payments

Payment is made toward an invoice after the delivery of a shipment.

To capture a payment

- After submitting the shipment delivery, from the Actions menu on the Invoice Details page, tap **Make Payment**.
  
  Alternatively, you can also capture or create a payment record from the Payments subtab on the Tasks List page.

- On the Payments List page, select a payment to navigate to the Payment Detail page.

- On the Payment Detail page, select the **Edit** icon to launch the Create and Edit Detail page where you can edit fields such as notes, signature, amount and so on.

  You can select from the different types of payment that you can select from such as check, cash, credit line, coupon, proof of purchase, credit card, store credit, and electronic transfer.

Note: You may not be able to redeem the store credit immediately after it is issued, if the profile option for store credit is set to Back Office. See Configuring Profile Options for more information.

- Tap **Save** after you are finish editing it.

- On the Payment Detail page, tap **Print** from the Actions menu to generate a .pdf file for the invoice on your mobile.

  Use the print functionality provided by your PDF Viewer to print the document.

  Payment receipts are printed based on legal entity where products and payments are grouped based on their legal entity association as applicable.

Alternatively, you can create and edit a payment for a delivery by navigating to the Payments subtab in the Tasks list page. Tap the plus icon on the Payments List page to launch the Create and Edit Payment page. Tap **Save** when you are done to save your changes.

Related Topics

- Configuring Profile Options in Oracle CX Retail Execution Mobile

Viewing Credit lines and Credit Notes

Your retail store can be approved for a credit line with one or more credit notes. Credit lines can be used to make payments towards invoice and outstanding credit lines as well. Credit lines are provided as an effective source of funds that can be readily used at your retail store’s discretion.
Viewing Credit Lines

To view the details of the credit lines and associated payments:

1. Sign in as the sales representative.
2. On the Landing page, tap **Accept** route and then **Start** route.
3. After checking into a route, tap Appointments subtab on the Landing page.
4. On the Appointments List page, tap **Check in** to an appointment card. Navigate to the Account Details page.
5. Tap the Credit Lines subtab.

Alternatively, you can tap the Credit Lines subtab on the Tasks List page as well.

6. Select a credit line to view the details on the Credit Lines Details page such as credit line number, account, and amount used, list of legal entities for the credit line and so on.

*Note:* On the Credit Lines Detail page, you can drill into a legal entity to view the associated details for that credit line.

A credit line can have one or more credit notes. The credit notes are the number of times a credit line can be used. View the credit note details such as credit note number, outstanding balance, and so on.

Paying for Credit Lines

To pay toward a credit line and credit note:

- On the Credit Lines or Credit Notes Detail page, tap **Make Payment**.
  
  You can pay for credit lines only using cash and check payment types.

- On the Create Payments page, provide details and tap **Save**.

Creating and Delivering Ad Hoc Orders

You can deliver ad-hoc orders and generate invoice to collect payments for the order you delivered using this feature.

You can create and deliver ad-hoc sales orders based on requests and your spare inventory in your van or truck for the requested products. You can also generate invoice to collect payments for ad-hoc orders.

To deliver ad-hoc orders:

1. Create an order.

   To create orders, refer to the Using Sales for Consumer Goods Mobile Guide

2. After order creation is complete, navigate to the Order Details page and tap the Summary subtab. Select the Actions menu and tap **Deliver**.

3. On the Deliver Order page, review the details and capture the store managers signature, name and date and tap **Submit**.

   Order Invoice page appears.
Note: A product delivered as a part of the shipment can also be related to a container. If the number of loaned containers for the selected products exceeds the maximum allowed limit, you must return the containers or pay for the additional ones. You can return the containers from Containers subtab. If you choose to pay for the additional containers, they are added to the invoice that is generated.

4. To review and print invoice and to capture payment, see Delivering Shipments

Related Topics

• Creating, Editing, and Canceling Orders in Oracle Customer Experience Retail Execution Mobile
# 12 Managing Route Inventory and Inventory Reload

## Managing My Inventory

As part of the direct store delivery feature, sales representatives can use My Inventory to assess their route inventory based on the products loaded in the trucks and their reloading requirements. Each sales representative is assigned to a route. The sales representative can use My Inventory to:

- Manage route inventory details
- Manage inventory reload details

### Types of Inventories

Both Route Inventory and Inventory Reload support two types of inventories:

- **Sellable**: Consists of items that are for sale
  - If route assortment is not available, non-sellable items are hidden.
- **Non-Sellable**: Consists of items that are not for sale

> **Note**: If an item is not included in the route assortment, it is considered as sellable.

## Managing Route Inventory

You can view the inventory of your delivery vehicle to ensure that it is well stocked to meet your delivery for the route at the beginning of the day before you start your delivery for the route. You can view your route inventory report and edit the report during the day until you check out of the route.

To view and edit My Inventory:

1. Sign in as the sales representative.
2. From the Shuttle Menu, tap **My Inventory**.
3. On the Inventory List page, expand **Sellable Inventory** or **Non-Sellable Inventory**.
4. Expand each inventory to view inventory attributes and their related details. You can edit the actual count as needed during your visit by tapping the Edit icon.
5. Tap **Save**.

To view distribution center details:

1. On the Inventory List page, tap the Action menu to select **View Distribution Center Details**.
   - This displays distribution center details like distribution center name, territory manager and sales representative assigned and so on.

To sign and print route inventory:

1. On the Inventory List page, tap **Sign and Print** from the Actions menu.
2. Administer your signature and enter the signed date.

3. Tap **Print** to generate a .pdf file for the route inventory report on your mobile device.

   Use the print functionality provided by your PDF Viewer to print the document.

Managing Inventory Reload

You might need to reload your inventory; you can view the inventory reload report to load your delivery vehicle with the required shipments for fulfilling the sales orders.

You can view your inventory reload report to review the inventory transactions at any point during delivery before route check out.

To view and edit your inventory reload report:

1. Sign in as the sales administrator.
2. From the Shuttle menu, tap **My Inventory**.
3. On the My Inventory List page, tap the Inventory Reload subtab.
4. Expand each inventory to view Inventory attributes and their related details. You can edit the load and unload fields as needed by tapping the Edit icon.
5. Tap **Save**.

To view distribution center details:

1. on the Inventory List page, tap the Action menu to select **View Distribution Center Details**.

   This displays distribution center details like distribution center name, territory manager and sales representative assigned and so on.

To sign and print the inventory reload report:

1. Tap the Actions menu and select
2. Administer your signature and enter the signed date
3. Tap **Print** to generate a .pdf file for the route reload report on your mobile device.

   Use the print functionality provided by your PDF Viewer to print the document.

**Related Topics**

- Why aren’t my route inventories and shipments being displayed?

**Transferring Route Inventory**

You can transfer route inventory from one sales representative to another. Let’s understand this with the help of an example:

Christy is a sales representative, who is visiting Small Inc. as per the route allocated to her. Christy has 40 fizzy drink bottles in her trunk, however the customer requests 100 bottles. Using Exchange option available on My Inventory page, Christy can find another sales representative who has 60 surplus bottles and agree upon a location to exchange the products. She can then contact the sales representative and agree on the location for the exchange.

To exchange route inventory,

1. Sign in as a sales representative.
2. From the Shuttle menu, tap **My Inventory**.
3. On the My Inventory subtab, tap Actions menu.
4. Tap **Exchange**.

The list page contains names of sales representatives, along with their route names
5. Tap the circle that contains the initials of the sales representative.

Tap **Location** icon on the Actions wheel to gauge the distance of the sales representative from you. Using **Call**, **Message**, or **E-mail** icons on the Actions wheel to connect with the sales representative to find more information or agree on the location for the exchange.

Using these instructions, Christy finds that Amir has 60 surplus bottles and is willing to transfer them to Christy. They decide a location to meet for the exchange. They use the following procedure to perform the exchange:

1. On the Exchange page, Christy taps Amir’s route and selects **Receive**.
2. Christy fills following details on the page:
   - **Inventory**: Product name for the bottles to be exchanged
   - **Quantity**: Number of surplus items to be transferred. In this example, 60
3. Tap **Submit**.

Amir also performs similar procedure on his device by selecting Christy’s route and tapping **Transfer** on the Exchange page.
Managing Route Settlement

Verifying and Submitting Route Inventory Transactions

You can close your route at the end of the day after the completion of your appointments for the day.

Route settlement includes the following:

- Vehicle review which involves a physical review of the vehicle and capture of the vehicles meter reading.
- Review of the sales representative’s van inventory by the distribution center inventory checker which includes verifying that the van inventory matches the order deliveries and returns as captured on the mobile application. The remaining inventory must be returned to the distribution center.
- Review of payments by the sales representative including collecting and auditing cash, credits, and vouchers against the payment records.

The distribution center inventory checker verifies the route inventory and route reload report and submits the route inventory transactions so that the sales representatives can close their route.

To verify and submit route inventory transactions and perform route inventory audit:

1. Sign in using the distribution center inventory checker role.

   Note: You must have required access to the `ZEM_ALLOW_INVREPORT_ACCESS` job role to perform this task.

2. Tap My Inventory from the Shuttle menu.
3. View the sales representative’s inventory and update the fields that are editable depending on your requirement.
4. Tap Submit to submit the inventory transaction which enables the creation of the route inventory transactions report.

Repeat steps one through four to verify and submit the route inventory reload transactions as well.

Note: To view the reports, refer to the Using Sales for Consumer Goods Guide.

Related Topics
- Sales Cloud Using Sales for Consumer Goods

Closing the Route

You settle your route at the end of the day after the completion of your appointments and then close the route as well.

Upon arrival to the distribution center at the end of the day the sales representative starts the settlement process. The sales representative can view the route summary, available documents, and expenses incurred for the route during the visit as well.

To settle and close the route:

1. After you have checked out of all the appointments associated to the route, Tap Finish to check out of the route on the Landing page.
2. Proceed with route settlement by tapping **Settle** on the Landing page.
3. On the Settle Route page, view route settlement details such as,
   - Payments made using cash, vouchers, coupons, and so on.
   - Payment related documents like payment receipt, bank deposit receipt, and so on.
   - Expenses incurred on the route by sales representative.
   - Payment overage or shortage.

   ✍️ **Note:** You can adjust the balance by recording cash, expenses or shortage amount. In order to close a route, the balance must be zero.

4. Tap **Actions** menu, select from the following actions to:
   - **Create and Edit Bank Deposit:** To create or edit any bank deposits made for cash received.
   - **Edit Documents:** To select the status of availability of the document and the reason for unavailability of a document.
   - **Create and Edit Expenses:** To create or edit expenses incurred by the sales representative in the route.

5. After you have reviewed the route settlement details, select **Print** to generate a .pdf file for the route settlement report on your mobile device.

   Tapping Print marks the route as settled and closes the route. You can print the route settlement report any time after closing the route as well.
14 Setting Up Oracle CX Retail Execution Mobile

Prerequisites for Setting Up Oracle CX Retail Execution Mobile: Explained

Use this topic to understand the required prerequisite tasks that you must perform in Consumer Goods web application to enable certain functionality available in Oracle CX Retail Execution Mobile.

List of prerequisite tasks:

- Create Job Roles for Route Download Administrator and inventory Reporter. See Creating Job Roles for detailed instructions.
- Understand and setup (if required) route auto-download. For more information, see Setting Up Route Auto-download and Auto-accept: Points to Consider.
- Configure Consumer Goods web application to enable download of activities on Oracle CX Retail Execution Mobile.
- Setup required Profile Options. For detailed instructions, see Setting Up Profile Options in Oracle CX Retail Execution Mobile.
- Enable Oracle Social Network and Analytics using Mobile Application Composer. See Enabling Oracle Social Network and Analytics in Oracle CX Retail Execution Mobile.
- Perform required configurations for BI Dashboard Reports. See Setting Up BI Dashboard Reports
- Ensure that Price Book privilege is added to the sales representative role that is used. See Setting Up Data Security Policies.
- Ensure that the price book includes price for the products in the product assortment, to enable sales representative to add products to the shipping cart.
- To support shopping cart and sales order features, ensure that the account must be assigned with an assortment plan. See Managing Product Assortments.
- Ensure that the sales representative is the primary resource of the route if route auto-download is activated. See Managing Distribution Centers and Routes for more information.
- Ensure that related container classes, assortment line relationships, and relevant account associations have been configured on the web application. See Working with Returnable Containers in Using Sales for Consumer Goods guide.

Creating Job Roles

You must create the following job roles and assign them to the appropriate users to grant privileges for specific tasks in the Oracle CX Retail Execution Mobile application.

- Route Download Administrator: Job role created and assigned to the sales administrator to enable route download.
- Inventory Reporter: Job role created and assigned to the distribution center inventory checker to enable submission of inventory transactions.
To create a job roles:

1. Sign in as the sales administrator.
2. Navigate to **Tools: Security Console - Administration page - Roles**.
3. Under the Role tab, search and drill down on the sales administrator role.

   The role code is **ORA_ZBS_SALES_ADMINISTRATOR_JOB**.
4. From the drop down, select Role Copy. In the Copy Options dialog box, select **Copy Top Role and Inherited Roles**.
5. Use the information in the following table to copy each of the roles:

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route Download Administrator</td>
<td>ZEM_ALLOW_PRIVILEGED_ACCESS</td>
</tr>
<tr>
<td>Inventory Reporter</td>
<td>ZEM_ALLOW_INVREPORT_ACCESS</td>
</tr>
</tbody>
</table>

6. Select **Users**.
7. Click **Add User** to add the necessary users you want to assign this job role to.
8. Click **Summary and Impact Report**.
9. Click **Submit and Close** and **OK**.
10. Click the Administration subtab and check for the Role Copy Status. Wait for the status to be Complete.

### Configuring BI Dashboard Reports

You can configure the Business Intelligence (BI) dashboard reports for your Oracle CX Retail Execution Mobile application and view your reports to assess your performance.

This topic explains the steps to configure your mobile dashboard using an example. In this example we will be naming the folder as **RetailExecutionDashboard**.

To configure the BI dashboard reports:

1. Sign in to Oracle Business Intelligence Analytics homepage as the sales administrator.
2. Navigate to Catalog and expand **Shared Folders - Custom**.
3. Click **New** and select **Folder** to create a new folder. Name the folder **RetailExecutionDashboard**.
4. To copy existing reports into the folder created, navigate to **Folders - Extension - oraco - R12PB5 Mobile**

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Tile View</th>
<th>Detail View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Vs Target</td>
<td>Tile_SalesVsTarget</td>
<td>Detail_SalesVsTarget</td>
</tr>
<tr>
<td>Visit History</td>
<td>Tile__VisitHistory</td>
<td>Detail_VisitHistory</td>
</tr>
<tr>
<td>Eligible Promotions</td>
<td>Tile_EligiblePromotions</td>
<td>Detail_EligiblePromotions</td>
</tr>
<tr>
<td>Sales Trend</td>
<td>Tile_SalesTrend</td>
<td>DetailESalesTrend</td>
</tr>
</tbody>
</table>
**Note:** Follow the naming convention for the report names. Tile reports must be in the format `Tile_<ReportName>`. Detail Reports must be in the format `Detail_<ReportName>`.

5. For each of the reports, click **More** and select **Copy**.

6. Navigate to the `RetailExecutionDashboard` folder created earlier as part of the example and paste the reports. Now click **More** on each of the reports and rename the tile and detail reports according to the naming convention. For example, `Tile_SalesVsTarget` and `Detail_SalesVsTarget`.

After you create the folder, set the profile option value for the folder as `/shared/Custom/RetailExecutionDashboard`, same as the folder name created. For more information on setting the profile option values for the BI Reports file path, refer to the Setting Up Profile Options section in the Getting Started with Consumer Goods Implementation guide.

**Related Topics**
- Installing Oracle CX Retail Execution Mobile

---

### Enabling Analytics and Oracle Social Network

Use this topic to understand how to enable Oracle Social Network and Analytics in the consumer goods web application to use it in the Oracle CX Retail Execution Mobile.

To enable Oracle Social Network:

1. Sign in as the sales administrator.
2. Navigate to Manage Sandboxes and create a sandbox. Navigate to Application Composer.
3. Select **Sales** application. Click **Common Setup - Mobile Application Setup**.
4. Tap **Oracle Sales Cloud Retail Execution**.
   This renders the Shuttle Menu.
5. Tap **Social** and enable the toggle switch to select **Show on Navigator**.
   Repeat the same step for **Analytics**.
6. Tap **Save**.
7. Apply this sandbox on your mobile application so that the sales representative can use Oracle Social Network and Analytics.

---

### Configuring Analytics Subtabs

Analytics subtabs can be configured to display relevant reports on Route, Activities, Promotions, Accounts, Products, and Credit Lines pages. Use this topic to understand how to configure analytics subtab for these objects using Mobile Application Composer.

You can configure analytic subtab for detail views of the following objects:

<table>
<thead>
<tr>
<th>Functional Name</th>
<th>Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td>Activity</td>
</tr>
<tr>
<td>Accounts</td>
<td>Account</td>
</tr>
<tr>
<td>Functional Name</td>
<td>Object Name</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>Promotions</td>
<td>__ORACO__Promotion</td>
</tr>
<tr>
<td>Routes</td>
<td>__ORACO__Route</td>
</tr>
<tr>
<td>Assortment Lines</td>
<td>__ORACO__ProdAssortmentLine</td>
</tr>
<tr>
<td>Credit Lines</td>
<td>__ORACO__CreditLineDSD</td>
</tr>
</tbody>
</table>

To configure analytics subtab for objects,
1. Sign in as the sales administrator.
2. Navigate to Manage Sandboxes and create a sandbox. Navigate to Application Composer.
4. Tap Oracle Sales Cloud Retail Execution.
5. On the Application Features region, select the object from the list and on the mobile view, click Analytics subtab.
6. From the Available Reports region, drag the required reports and drop them on the Analytics subtab page.
7. Save and publish the sandbox.

Configuring Profile Options

You must create and set the appropriate values for the profile options to set up and use your Oracle CX Retail Execution Mobile Application.

The following features can be enabled by setting the right values for the profile options:

- Downloading surveys from the Oracle Policy Automation Hub
- Enabling the Business Intelligence(BI) dashboard
- Enabling route download
- Enabling display of the privacy policy
- Enabling application composer for tablet devices

Use the following table as a reference while setting the profile options:

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Display Name</th>
<th>Profile Values and Description</th>
<th>Application</th>
<th>Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>__ORACO__MOBILE_OPA_HUB_URL</td>
<td>MOBILE_OPA_HUB_URL</td>
<td>Site: https://&lt;your-environment&gt;/opa-hub</td>
<td>Sales</td>
<td>Activity</td>
</tr>
<tr>
<td>__ORACO__MOBILE_DASHBOARD_INFOLET_PATH</td>
<td>MOBILE_DASHBOARD_INFOLET_PATH</td>
<td>Site: /shared/Custom/RetailExecutionDashboard</td>
<td>Sales</td>
<td>Activity</td>
</tr>
<tr>
<td>Profile Option Code</td>
<td>Profile Display Name</td>
<td>Profile Values and Description</td>
<td>Application</td>
<td>Module</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------</td>
<td>--------------------------------</td>
<td>-------------</td>
<td>--------</td>
</tr>
<tr>
<td><em>.</em> ORACO_ _ ROUTE_ AUTODOWNLOAD</td>
<td>Automatic Route Download</td>
<td>This enables Business Intelligence reports for the sales representative to view their performance dashboard.</td>
<td>Sales</td>
<td>Sales</td>
</tr>
<tr>
<td><em>.</em> ORACO_ _ PRIVACY_ POLICY</td>
<td>Privacy Policy</td>
<td>You must disable automatic route download so that the routes can be manually downloaded by the sales administrator. Set the Profile Value to TRUE if you want to enable automatic download of routes.</td>
<td>Sales</td>
<td>Activity</td>
</tr>
<tr>
<td>ACO_ DISABLE_ CG_ TABLET_ACCESS</td>
<td>Tablet Composer Access</td>
<td>Use this profile option to enable or disable access to tablet composer. If this profile option doesn’t exist or is set to Y, the tablet artifacts will not be generated. If user accesses the application from a tablet device, only mobile view is shown unless the profile option is set to N.</td>
<td>Mobile Sales</td>
<td>Mobile Sales</td>
</tr>
<tr>
<td><em>.</em> ORACO_ _ CREDIT_ LISTPRICE</td>
<td>Store Credit List Price</td>
<td>Initial value is set to Site: Y. Use this option if the store credits allocated to an account must be immediately available in the mobile application.</td>
<td>Sales</td>
<td>Sales</td>
</tr>
</tbody>
</table>
### Configuring Profile Options: Procedure

Use the following steps to enable the profile options, with the help of parameters listed in the preceding table.

1. Sign in to Oracle Sales Cloud using Administrator role.
2. Navigate to Setup and Maintenance.
3. In the search box, search for Manage Profile Options and click on the task.
4. In the Manage Profile Options page, click on the **New** icon in the **Profile Options** section.
5. In the Create page, provide the details listed as per the table. Set Current date as the **Start Date**.

---

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Display Name</th>
<th>Profile Values and Description</th>
<th>Application</th>
<th>Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>for redemption when a product is returned. When you use this option, the mobile application aggregates the transactions to create a local copy of the store credits. The ERP system does not validate the transactions.</td>
<td><strong>N</strong>: Back Office. Use this option if the store credits allotted to an account must be prevented from being redeemed immediately using the mobile when a product is returned. When you use this option, the ERP system validates the transactions along with the payment and order details before the store credits are generated for the account. These credits are a part of the download package and can be utilized by the account after they are synced to mobile.</td>
<td><strong>ORACO_ROUTE_AUTODOWNLOAD</strong></td>
<td>Application</td>
<td>Module</td>
</tr>
</tbody>
</table>

**Tip:** To enable automatic download of routes for a specific use create a new Profile Value for **ORACO_ROUTE_AUTODOWNLOAD** with **Profile Level** as User and User Name for the user. Set **Profile Value** to **TRUE**.
6. Click **Save and Close**.
7. At the **Profile Option Levels**, set **Site to Enabled** and **Updatable**.
8. Click **Save and Close**.
9. Back on the Setup and Maintenance page, Search and select Manage Administrator Profile Values task.
10. Search for the Profile Option Code listed in the table.
11. Create a new value for the **Profile Option** under **Profile Values** section.
12. Select **Site** and set the **Profile Value** as per the table.
13. Click **Save and Close**.

**Related Topics**
- Creating and Editing Profile Options: Procedure

**Enabling Route Auto-download and Auto-accept: Points to Consider**

This topic explains the two scenarios in which the route auto-download and auto-accept options will automatically be enabled for the Oracle CX Retail Execution Mobile application.

The scenarios are as follows:

- If the profile option is created but the profile option values for the specific user and the site level profile option is not added for the user in the Manage Profile Option section. If so, the route auto-download will automatically be enabled.
- If the profile option itself is not created in the application for all the users, then also the route auto-download is enabled.

**Note:** When route auto-download is enabled, route is automatically accepted after download.

**Related Topics**
- Downloading Routes in Oracle Customer Experience Retail Execution Mobile

**Configuring Web Application to Enable Download of Activities**

This topic explains the steps to view the activities created in the Consumer Goods Web Application in the Oracle CX Retail Execution Mobile Application.

To view the activities on the Oracle CX Retail Execution Mobile application, you must perform the following set of steps in the given sequence on the Consumer Goods Web application.

1. Managing Distribution Center and Routes
2. Creating Appointments
3. Running Enterprise Scheduler Service (ESS) Jobs

Managing Distribution Center and Routes
The following must be done in the Consumer Goods Web application.

Note: For more information on performing the given steps, refer to the Managing Distribution Centers and Routes chapter in the Using Sales for Consumer Goods guide.

1. Create Distribution Center and assign a resource to it.
2. Associate an existing route to a distribution center or create a new route.
3. Allocate resource to the route associated to the distribution center.

Note: Once you have completed required configuration on the Consumer Goods Web Application, you must ensure that route is downloaded and accepted on the Oracle CX Retail Execution Mobile.
- If route auto-download is enabled, then the route is automatically downloaded and accepted on the mobile application. See Setting Up Route Auto-download and Auto-accept: Points to Consider
- If route auto-download is disabled, then route must be downloaded and accepted. See Downloading Routes in Using Retail Execution Mobile guide.

Creating Appointments
During appointment creation on the Consumer Goods Web Application, the sales administrator must enter values for the following fields to view the activities in the mobile application. First, navigate to Activities- Create Appointment and enter the values for the following fields:

Note: For more information on creating appointments, refer to the Managing Appointments section in the Using Sales for Consumer Goods guide.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store Visit</td>
<td>Select the check box</td>
</tr>
<tr>
<td>Store Visit Type</td>
<td>The store visit type associated to the appointment.</td>
</tr>
<tr>
<td>Route</td>
<td>The route that the appointment has been assigned to.</td>
</tr>
<tr>
<td>Account</td>
<td>The account associated to the appointment.</td>
</tr>
</tbody>
</table>

Running ESS Jobs
The following ESS jobs must be run in the Consumer Goods Web application:
- Prepare Consumer Goods Route Download Document
- Generate Consumer Goods Shopping Cart Templates
- Prepare Consumer Goods Appointment Download Document
Note: For more information on scheduling ESS jobs, refer to the Setting Up Enterprise Service Scheduler Jobs chapter in the Getting Started with Consumer Goods Implementation guide.

Related Topics

- Managing Appointments in Oracle Sales Cloud for Consumer Goods
15 Extending Oracle CX Retail Execution Mobile

Extending the Retail Execution Mobile and Tablet Applications

This topic covers what you can extend in the Oracle CX Retail Execution Mobile application using Application Composer. You can use the Application Composer to extend the objects and fields in the mobile or the tablet and then show or hide these from the user interface depending on your requirement.

To extend the Retail Execution mobile application:

1. Sign in with a Sales Administrator or Implementor role.
2. Select the sandbox you want use for your extensibility configurations.
3. Click Navigator - Application Composer.
4. Select the Sales application.
5. Select Common Setup-Mobile Application Setup and click Oracle Sales Cloud Retail Execution.

Note: For more information on how extend mobile applications, see the section Oracle CX Enterprise Mobile in the Customizing Sales guide. The topic Adding Oracle Business Intelligence Reports to a Sales Object’s Analytics tab in this section does not apply to the Oracle CX Retail Execution Mobile application.

The following table lists the objects along with what you can extend in each of the objects:

<table>
<thead>
<tr>
<th>Object Display Name</th>
<th>Object API Name</th>
<th>Configure Fields</th>
<th>Configure Child Objects</th>
<th>Show or Hide Actions</th>
<th>Dynamic Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>__ ORACO__Accounts_c</td>
<td>Limited to detail view</td>
<td>Yes</td>
<td>Not applicable</td>
<td>Yes</td>
</tr>
<tr>
<td>Appointment</td>
<td>__ ORACO__Activities_c</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Inventory Audit</td>
<td>__ ORACO__Inventory_c</td>
<td>Applicable to list and edit view</td>
<td>Not applicable</td>
<td>Limited to list view</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion</td>
<td>__ ORACO__Promotion_c</td>
<td>Applicable to list and detail view</td>
<td>Not applicable, Read-only object</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Check In Page</td>
<td>NA</td>
<td>Not applicable</td>
<td>Limited to addition of child and related objects of Accounts and Activities.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note: Not applicable in the table refers to features that are not applicable to the object. No refers to features that are not yet implemented in the application.
<table>
<thead>
<tr>
<th>Object Display Name</th>
<th>Object API Name</th>
<th>Configure Fields</th>
<th>Configure Child Objects</th>
<th>Show or Hide Actions</th>
<th>Dynamic Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Route</strong></td>
<td>__ ORACO__Route_c</td>
<td>Limited to detail view</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Product Assortment</strong></td>
<td>__ ORACO__ProductAssortment_c</td>
<td>Applicable to list and detail view</td>
<td>Yes</td>
<td>Not applicable</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cart</strong></td>
<td>__ ORACO__ShoppingCartDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Promotion Products</strong></td>
<td>__ ORACO__PromotionProductCollection_c</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cart Items</strong></td>
<td>__ ORACO__ShoppingCartItemCollection_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Order</strong></td>
<td>__ ORACO__OrderDSD_c</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Order Items</strong></td>
<td>__ ORACO__OrderLineDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Shipment</strong></td>
<td>__ ORACO__ShipmentDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Shipment Lines</strong></td>
<td>__ ORACO__ShipmentLineDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Route Inventory</strong></td>
<td>__ ORACO__RouteInventory_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Account Credit</strong></td>
<td>__ ORACO__CreditLineDSD_c</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Payment</strong></td>
<td>__ ORACO__PaymentDSD_c</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note:* Do not show/hide any buttons for this object.

These are added as subtabs on Check In Page.
Object Display Name | Object API Name | Configure Fields | Configure Child Objects | Show or Hide Actions | Dynamic Layout |
--- | --- | --- | --- | --- | --- |
Payment Lines | __ ORACO__ PaymentLineDSD_c | No | No | No | Yes |
Invoice | __ ORACO__ InvoiceDSD_c | No | No | No | Yes |
Invoice Lines | __ ORACO__ InvoiceLineDSD_c | No | No | No | Yes |

**Note:** For additional steps on extending the order object, refer to the Performing Implementation Tasks in the Oracle Getting Started with Consumer Goods Implementation guide.

### Configurations After Adding Custom Fields to Objects

For the objects listed in the following table, after you create and add custom fields, and publish your sandbox, you must run ESS job **Enable Consumer Goods Object Extension for Mobile Application**.

Some of these objects in the following table also require you to enable **Force Inclusion in Download** for them from Fields subtab on the Object Configuration page.

<table>
<thead>
<tr>
<th>Object Display Name</th>
<th>Object API Name</th>
<th>Enable Force Inclusion in Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment</td>
<td>__ ORACO__ PaymentDSD_c</td>
<td>No</td>
</tr>
<tr>
<td>Account Credit</td>
<td>__ ORACO__ CreditLineDSD_c</td>
<td>Yes</td>
</tr>
<tr>
<td>Order</td>
<td>__ ORACO__ OrderDSD_c</td>
<td>Yes</td>
</tr>
</tbody>
</table>

To enable force inclusion in object download,

1. Sign in and click **Navigator - Object Configuration**.
2. Click the object for which the custom field was created.
3. Navigate to Fields subtab.
4. Select **Force Inclusion in Download** for the custom field that was created.
5. Click **Save and Close**.

**Related Topics**

- Customizing Sales Cloud
- Performing Implementation Tasks in Oracle Sales Cloud for Consumer Goods
Associating Custom Tasks with Custom Objects

You can associate your custom task with a custom object in Oracle CX Retail Execution Mobile. This topic explains how to associate your task with a custom object and how to add it to the mobile interface designer.

Use Application Composer to find out the API name of the custom object that you want to associate your task with, and then add your custom object to the mobile interface designer.

1. While creating your custom task in simplified UI on the Store Visit Tasks page, fill in the Code field to associate a custom object with the task that you are creating.
   
   a. In Application Composer, click the custom object that you want to associate your task with.
   
   b. On the custom object Overview page, click the Edit icon.
   
   c. On the Edit Object dialog box, copy the API Name.
   
   d. Paste the API name that you copied in the Code field for your task on the Store Visit Tasks Create page.

   You have associated your task with the custom object. You must now add this custom object on the mobile interface designer so that it’s available on the mobile device.

2. Create a sandbox.
3. In Application Composer, select Sales from the Applications list.
4. Click Mobile Application Setup under Common Setup.
5. In the Oracle Customer Experience Cloud Mobile Applications page, click Oracle Sales Cloud Retail Execution.
6. Select your custom object from the Available Features pane and drag it onto the mobile interface designer.
7. In the object views dialog box, click OK.
8. Select the custom object that you just added to the mobile interface designer, and click Enable Auto Fetch under the Feature Details pane.
9. Download the sandbox on your mobile device.
10. Select the sandbox that contains your customizations and tap Save.
11. Check your customizations.
12. Once you have verified that the customizations are correct, sign in to the web application as the same user you used to make the customizations, and publish the sandbox.

You can now access your task from the list of tasks in your mobile, and when you click your task, the associated custom object page appears.
16 FAQs

Can I continue using the application when the application is downloading data from the server?
No. All actions are disabled temporarily when the application is performing synchronization.

Do I have to check in to an appointment every time I want to create or edit notes?
No. You can also create and edit notes without checking in to a route and an appointment. Tap the Appointments subtab on the landing page; select an appointment from the Appointments List page and Tap Tasks. On the Tasks List page, select the Notes subtab to create and edit notes.

Can I reschedule an appointment?
No, you cannot reschedule an appointment from the mobile application.

How can I continue my store visit after I navigate away from the Appointment List page?
Navigate to the Appointments List page and tap Resume Visit to continue your store visit.

Can I edit photos for a store visit without checking into an appointment?
No. You have to check into a route followed by an appointment check-in to edit photos and view the photo library.
**Can I perform a store visit task while viewing the guided store visit tasks?**

No. You must be checked into a task, followed by an appointment check-in to perform the store visit tasks and other related activities.

*Note:* Specify the reason for not completing a store visit by selecting from options such as road accident, store closed, vehicle breakdown by navigating to a specific incomplete store visit. On selection of a reason, the visit status gets set to Not Visited.

**Why aren't my route inventories and shipments being displayed?**

For the route inventories and shipments to be displayed correctly, you must ensure that you have executed appropriate scheduled process.

If you do not see route inventories, perform the following steps:

1. Run Route Download scheduled process.
2. Run Appointment Download scheduled process.
3. On your mobile or tablet application, navigate to **Pending Sync** and tap **Sync Now**.
4. Once the sync process is completed, run perform the store visit tasks on the application.
5. Run Route Upload schedule process.
6. Add route inventories for the route using the web application.

If your shipments are not being displayed, perform the following steps:

1. Run Route Download scheduled process.
2. Run Appointment Download scheduled process.
3. On your mobile or tablet application, navigate to **Pending Sync** and tap **Sync and Download**.
4. Once the sync process is completed, check if the shipments and shipment lines are being displayed.

*Note:* Shipments and shipment lines are populated by your ERP system.

**Why can't I view the activities?**

To view activities in the Oracle CX Retail Execution Mobile application, you must perform the following in the Consumer Goods Web application after signing in as the sales administrator:

1. Create Distribution Center and assign a resource to it.
2. Associate an existing route to a distribution center or create a new route.
3. Allocate resource to the route associated to the distribution center.
4. Create appointments with details entered for store visit check box, route, account and store visit type.
5. Run Enterprise Scheduler Service Jobs for the following jobs:
   - Prepare Consumer Goods Route Download Document
   - Generate Consumer Goods Shopping Cart Templates
   - Prepare Consumer Goods Appointment Download Document

For more information on viewing activities on the Oracle CX Retail Execution Mobile application, refer to the Enabling Download of Activities topic in the Getting Started with Consumer Goods Implementation guide.

Related Topics
- Managing Appointments in Oracle Sales Cloud for Consumer Goods
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