

CX for Industries

Using Consumer Goods Mobile

April 2023



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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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1 About this Guide

Audience and Scope

This guide provides information about how to set up, use, and extend the Oracle Customer Experience Cloud for the Consumer Goods mobile application. With a task-based approach, this guide serves as a reference to all everyday tasks you perform in application.

Related Guides

See the following related guides to understand the Consumer Goods business flows and functionality.

Guide	Description
Oracle CX for Industries Getting Started with Consumer Goods Implementation	Describes how to set up and configure Consumer Goods application either while implementing or after implementing Oracle CX Sales and Oracle B2B Service.
Oracle CX for Industries Using Consumer Goods	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.
Oracle CX Sales Extending Sales Guide	Provides instructions to extend the mobile and tablet applications.
Oracle CX for Industries Integrating Retail Execution Mobile Direct-Store-Delivery	Provides information on how you can integrate back-end systems such as supply chain, accounting, or order management systems with Direct-Store-Delivery processes in Consumer Goods Mobile.

Related Topics

2 Overview

Consumer Goods Mobile: Overview

Use consumer goods mobile 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 perform these 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.
- Deliver the shipments and collect payments for them.

Direct Store Delivery enables you to deliver goods directly to your customers using the consumer goods mobile application. 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. This enables you to perform, track, and manage transactions at each stage of the delivery process, starting from checking your appointments to completing your visits.

For more information on the direct store delivery flows available for integration in consumer goods mobile, see the Integrating Retail Execution Mobile Direct-Store-Delivery guide.

Related Topics

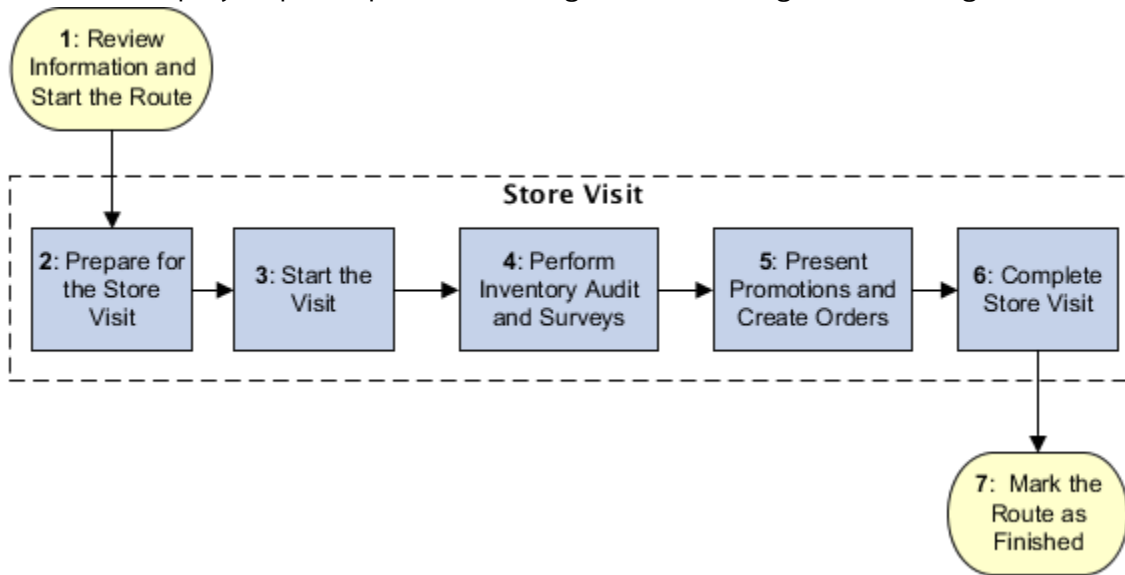
- [Install Consumer Goods Mobile](#)
- [Prerequisites Tasks](#)

How to Execute Merchandising Visits

As a merchandising sales representative, here's how you can use the mobile application to manage your typical day with a step-by-step guide to execute the merchandising visits with the help of an example.

Lisa works as a sales representative at Vision Beverages Ltd. As a part of her work, she goes to multiple retail stores and carries out various merchandising tasks assigned to her. See the list of activities that Lisa performs on any typical day.

Here is the step-by-step example workflow diagram for executing merchandising tasks:



Review the Route Information and Start the Route

If the sales administrator has enabled route auto-download, Lisa is prompted to start the route when she signs in. If the route auto-download isn't enabled, the administrator must download the route on Lisa's device. In this case, when she signs in, she's prompted to accept the route first. Before she starts the route, she can review the route summary information, for instance, the profile of the account associated with the route. For more information, see the Route Management and Accounts and Appointments sections.

Prepare for the Store Visits

After starting the route, Lisa reviews the appointments for the day with the help of the information available on the appointments tab. For instance, she can find out driving directions to the store using the map view of the appointments. She reviews store binders related to the account for any associated marketing content. She checks the store visit history and notes from previous visits. She can edit existing appointments or create follow-up appointments as required. She can prepare better for her store visits. To understand how to review appointment information as well as create new or follow-up appointments, see the Accounts and Appointments sections.

Start Your Store Visit

Lisa has now reviewed all the information about the route and associated store visits. She arrives at the first store based on her appointments list. She checks in to the store to start performing the in-store activities that are automatically populated based on the store visit type. For more information, see Store Visits.

Perform Store Inventory Audit and Surveys

At the store, Lisa starts taking stock of the store inventory, to update details such as shelf stock, facing, display locations, and so on. She also updates the item display locations, take notes, and takes photos while auditing the store inventory. Lisa then begins conducting account and promotion compliance surveys to get more information about product performance and customer feedback. These surveys help in ensuring effective promotion execution and compliance at the store.

Present Promotions and Create Orders

Lisa uses marketing content from the account store binders to present discounts and offers made available to the select products as promotions to the store manager. Based on store manager's requirements, she adds some of these promotions to the shopping cart. She adds products to the shopping cart per her conversations with the store manager. Based on her audit of store inventory and interactions with store managers, she adds out-of-stock and low inventory products to the cart as well. Lisa then submits the cart to place orders and captures store manager's signature. For more information about presenting promotions, see the Promotions section.

Complete Store Visit

After finishing all the required store visit tasks, Lisa marks these tasks as complete and checks out of the store visit appointment. At this point, if Lisa is assigned another appointment for order delivery for the same store, she can check in to that appointment to deliver shipments using the direct store delivery features offered by the application. Lisa then proceeds to complete all other store visits that are allocated to her for the day as a part of her route assignment. For more information about shipment delivery, see Direct Store Delivery Tasks section.

Mark the Route as Finished

After checking out of all the appointments, Lisa returns to the distribution center and marks the route as finished.

Manage In-Store Activities

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

In-Store Activities

As a sales representative, you can prepare for the day using the appointments and accounts pages. Your mobile application facilitates viewing of appointments visits with a guided tasks list without checking in to an appointment. You can do the following in-store activities:

- **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.

Supplementary Activities

Use the Main 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 synchronization, edit the settings, view and reload your inventory, and so on. Some of the key supporting activities that you can perform for an appointment during your store visit 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 and planograms to leverage your sales.
- **Merchandising Materials:** Share merchandising materials and planograms with the retail stores.
- **Store Binders:** Use store binders to view marketing content.

As a sales person, you can now use the multiple **Units of Measure (UOMs)** which working on the Order Entry or Inventory . You can now select the the units for products, specify multiple units for same product, and convert the units for product which can help with pricing calculations.

Related Topics

- [Check In to a Store Visit](#)
- [Perform Store Visit Tasks](#)
- [How can I continue my store visit after I navigate away from the Appointment List page?](#)

Explore Demo Mode

As a salesperson, you can view a demo mode of the application even when you're offline. You can view the store visit tasks, notes, photos, surveys, shopping cart, and orders related to the tasks.

1. Navigate to the home page.
2. Tap **Demo**.

Use 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 Main menu. This launches the Oracle Social Network for you to collaborate.

Note: Social is available only in the online mode.

Use Analytics and Dashboard

Use Analytics page to view Business Intelligence (BI) reports for retail account. View favorite analytics reports and search reports from BI Catalog. As salesperson, view BI reports on configurable home page to analyze performance of retail sales, promotions.

Analytics

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

Note: Analytics is only available in online mode. For more information about Enabling Analytics, refer to the Getting Started with Consumer Goods Implementation guide.

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

- [Configure Analytics Tabs](#)

3 Consumer Goods Mobile Setup

Prerequisites Tasks

As a sales administrator or implementor, you must enable these critical features to use the consumer goods mobile application.

Note: Before you complete these tasks, complete the steps given in Getting Started with Consumer Goods Implementation guide.

Task	Mandatory	Further Resources
Create job roles for Route Download Administrator and Inventory Reporter.	Yes	Create Job Roles
Understand and setup route auto-download.	No	Route Auto-download and Profile Options
Configure consumer goods web application to enable download of activities on the mobile application.	Yes	Configure the Web Application to Enable Download of Activities
Set up these profile options: <ul style="list-style-type: none"> • Enable download of surveys from Intelligent Advisor Hub • Configure the Business Intelligence (BI) dashboard infolet path • Enable route auto-download • Enable display of the privacy policy for your company • Enable tablet composer access • Configure store credit list price 	No	Profile Options
Perform required configurations for BI Dashboard Reports.	No	BI Dashboard Reports
Add the Price Book privilege to sales representatives.	Yes	Data Security Policies
Ensure that the price book includes price for the products in the product assortment. This enables sales representatives to add products to the shipping cart.	Yes	Price Books and Taxation

Task	Mandatory	Further Resources
Assign an assortment plan to the account. This enables shopping cart and sales order features.	Yes	Product Assortments
Add sales representatives as the primary resource for routes if you have enabled route auto-download.	Yes	Distribution Centers and Routes
Configure related container classes, assortment line relationships, and relevant account associations on the web application.	Yes	Returnable Containers
Enable Oracle Social Network.	No	Analytics and Oracle Social Network
Enable Analytics page and configure Analytics tabs.	No	Analytics and Oracle Social Network

Note: Ensure that you have configured required surveys in Oracle Intelligent Advisor Hub.

If you use the Direct Store Delivery feature, see the Integrating Retail Execution Mobile Direct Store Delivery guide. This guide describes how the integrated applications work with the consumer goods mobile application and the configurations required to support integrated business processes.

Related Topics

Create Job Roles

As an administrator, you create the following job roles, assign the roles to the appropriate users, and grant privileges to perform tasks.

- 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 these job roles:

1. Go to **Tools, Security Console, Administration, and Roles**.
2. On the Role tab, search and select the sales administrator role.

The role code is `ORA_ZBS_SALES_ADMINISTRATOR_JOB`.

3. Select Role Copy. In the Copy Options dialog box, select **Copy Top Role and Inherited Roles**.

- Use the information in the following table to copy each of the roles:

Role Name	Role Code
Route Download Administrator	ZEM_ALLOW_PRIVILEGED_ACCESS
Inventory Reporter	ZEM_ALLOW_INVREPORT_ACCESS

- Go to **Users** and **Add User** to create and assign the necessary users.
- Click **Summary and Impact Report**.
- Click **Submit and Close** and **OK**.
- Click **Administration** and check for the Role Copy Status. Wait for the status to be Complete.

Configure BI Dashboard Reports

As an administrator, configure the Business Intelligence (BI) dashboard reports for consumer goods mobile and view your reports to track and monitor the performance.

See the following example to configure your mobile dashboard with the folder name `RetailExecutionDashboard`.

- Sign in to Oracle Business Intelligence Analytics home page as a sales administrator.
- Go to Catalog and expand **Shared Folders > Custom**.
- Click **New** and select **Folder** to create a new folder. Name the folder `RetailExecutionDashboard`.
- To copy existing reports into the folder created, navigate to **Folders > Extension > ORACO > R12PB5 Mobile**

Report Title	Tile View	Detail View
Sales Vs Target	Tile_SalesVsTarget	Detail_SalesVsTarget
Visit History	Tile_VisitHistory	Detail_VisitHistory
Eligible Promotions	Tile_EligiblePromotions	Detail_EligiblePromotions
Sales Trend	Tile_SalesTrend	Detail_ESalesTrend

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>`.

- For each of the reports, click **More** and select **Copy**.
- Go to the `RetailExecutionDashboard` folder 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**. For more information, see the Profile section in the Getting Started with Consumer Goods Implementation guide.

Configure Analytics and Oracle Social Network

You can enable Oracle Social Network and Analytics in the consumer goods web application for use in the consumer goods mobile application.

To enable Oracle Social Network:

1. Navigate to Manage Sandboxes and create a sandbox.
2. Navigate to Application Composer and select **Sales** application
3. Tap **Common Setup > Mobile Application Setup**.
4. Tap the application to see the **Main 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 salesperson can use Oracle Social Network and Analytics.

See the Configure Analytics topic for more information about analytics.

Configure Analytics Tabs

As administrators, you can configure the analytics tabs to display relevant reports on Route, Activities, Promotions, Accounts, Products, and Credit Lines pages. Let's see how you can configure the analytics tab for the objects using Mobile Application Composer.

You can configure analytics tab for detail views of the following objects:

Functional Name	Object Name
Activities	Activity
Accounts	Account
Promotions	__ORACO__Promotion
Routes	__ORACO__Route
Assortment Lines	__ORACO__ProdAssortmentLine

Functional Name	Object Name
Credit Lines	__ORACO__CreditLineDSD

To configure analytics tab for objects:

1. Go to Manage Sandboxes and create a sandbox. Navigate to Application Composer.
2. Select **Sales** application. Click **Common Setup > Mobile Application Setup**.
3. Tap your sales application **Oracle CX Sales**.
4. On the Application Features region, select the object from the list and on the mobile view, click Analytics tab.
5. From the Available Reports region, select and move the required reports and drop them on the Analytics tab page.
6. Save and publish the sandbox.

Configure Profile Options

You must configure the profile options to use the consumer goods mobile application.

As a sales administrator, you must set the profile options to enable these features:

- Download of surveys from Oracle Intelligent Advisor Hub
- Business Intelligence (BI) dashboard
- Route download
- Express Delivery
- Display of the privacy policy
- Application composer for tablet devices
- Display of legal verbiage and privacy policy
- Alert to sales representatives about checking in or checking out outside the preset radius of the stores
- Disable photo album access
- Photo capture for store inventory line

You can use these values as a reference to set the profile options.

Profile Option Code	Profile Display Name	Profile Values and Description	Application and Module
__ORACO__MOBILE_OPA_HUB_URL	MOBILE_OPA_HUB_URL	Site: <code>https://<your-environment>/opa-hub</code> Enables download of surveys from Intelligent Advisor Hub.	Application: Sales Module: Activity
__ORACO__MOBILE_DASHBOARD_INFOLET_PATH	MOBILE_DASHBOARD_INFOLET_PATH	Site: <code>/shared/Custom/RetailExecutionDashboard</code> Enables Business Intelligence reports for the sales representatives to view their performance dashboard.	Application: Sales Module: Activity

Profile Option Code	Profile Display Name	Profile Values and Description	Application and Module
<u>ORACO_ROUTE_</u> <u>AUTODOWNLOAD</u>	Automatic Route Download	<p>Site: FALSE</p> <p>Disables automatic route download. You must manually download the routes.</p> <p>Set the value to TRUE to enable automatic download of routes.</p> <p>To enable automatic route download for a specific user, create a new profile value for this profile option. You must create the profile value with Profile Level as User and User Name for the user. Set Profile Value to TRUE.</p>	<p>Application: Sales</p> <p>Module: Sales</p>
<u>ORACO_PRIVACY_POLICY</u>	Privacy Policy	<p>Site: Set the value based on your requirement to enable the display of company privacy policy.</p> <p>The value you enter must be within thousand characters.</p>	<p>Application: Sales</p> <p>Module: Activity</p>
<u>ACO_DISABLE_CG_TABLET_</u> <u>ACCESS</u>	Tablet Composer Access	<p>Site: N</p> <p>Enables tablet view. You can use this option to enable or disable access to tablet composer.</p> <p>If this option doesn't exist or is set to Y, only mobile view is shown even if the user accesses the application from a tablet device.</p>	<p>Application: Mobile Sales</p> <p>Module: Mobile Sales</p>
<u>ORACO_CREDIT_LISTPRICE</u>	Store Credit List Price	<p>Initial value is Site: Y</p> <ul style="list-style-type: none"> Y: Immediate. Enables immediate redemption of store credits using the mobile application when a product is returned. The mobile application aggregates the transactions to create a local copy of the store credits. The ERP application doesn't validate the transactions. N: Back Office. Store credits allocated to an account can't be redeemed immediately using the mobile application when a product is returned. The ERP application validates the transactions along with the payment and order details before the store credits are generated for the account. 	<p>Application: Sales</p> <p>Module: Sales</p>

Profile Option Code	Profile Display Name	Profile Values and Description	Application and Module
		These credits are a part of the download package and can be used by the account after they're synced to mobile.	
<code>__ORACO__EXPRESS_DELIVERY</code>	<code>EXPRESS_DELIVERY</code>	Site: Y Enables express delivery.	Application: Sales for Consumer Goods Retail Execution Module: Sales for Consumer Goods Retail Execution
<code>__ORACO__ENABLE_REP_FULL_ACCESS_ON_ROUTE_INVENTORY</code>	Read Only Route Inventory Access for Sales Representative	Site: Yes Enables full access to the route inventory for sales representatives.	Application: Sales Module: Sales
<code>__ORACO__SYNC_BEFORE_START_ROUTE</code>	Sync Before Start Route	Site: Yes Enables sales representatives to upload the changes on the Pending Sync page.	Application: Sales Module: Sales
<ul style="list-style-type: none"> • <code>__ORACO__SYNC_BEFORE_START_ROUTE__ORACO__CREDIT_LEGAL_CLAUSE_FOR_MOBILE</code> • <code>__ORACO__CONTAINER_LEGAL_CLAUSE_FOR_MOBILE_PRINTOUT</code> • <code>__ORACO__E_DATA_INFO_CLAUSE</code> • <code>__ORACO__PRIVACY_POLICY</code> 	<ul style="list-style-type: none"> • Display Legal Verbiage for New Credit Line • Display Legal Verbiage for Outstanding Container Balance • Display Legal Verbiage for Billing Information • Display Privacy Policy 	Set the legal verbiage for these profile options based on your need. <ul style="list-style-type: none"> • Enables the display of legal clauses for new credit line usage. • Enables the display of legal clauses for outstanding container balance. • Enables the display of legal clauses for billing information. • Enables the display of privacy policy. 	Application: Sales for Consumer Goods Retail Execution Module: Sales for Consumer Goods Retail Execution
<ol style="list-style-type: none"> 1. <code>__ORACO__ENABLE_STORE_CHECK_IN_GEOFENCING</code> 2. <code>__ORACO__STORE_CHECK_IN_RADIUS</code> 	Enable Notifying Sales Representative About Checking In or Out of the Preset Radius to the Store.	<ol style="list-style-type: none"> 1. Y Enables notification to alert sales representatives if they're checking-in or checking-out outside the preset radius of the stores. 2. Set the value to a distance of your choice in meters, for example, 200. By default, this option is set to 100 meters. 	Application: Sales Module: Sales
<code>__ORACO__ENABLE_PHOTO_ALBUM_ACCESS</code>	Disable photo album access.	N Disables photo album access for sales representatives.	Application: Sales Module: Sales

Profile Option Code	Profile Display Name	Profile Values and Description	Application and Module
ORACO_ENABLE_PHOTO_FOR_INVENTORY_AUDIT	Enable photo capture.	Site: Y Enables photo capture for each store inventory line.	Application: Sales Module: Sales

Tip: The automatic route download is automatically enabled in the following scenarios:

- You created the profile option but didn't set the values for a specific user. The site-level profile option is also not added for the user in the Manage Profile Option section.
- You didn't create the profile option in the application for all the users.

Note: When automatic route download is enabled, routes are automatically accepted after download. If you disable this profile option, you must ensure that the appointments are created by sales administrator only. The sales administrator is added as a resource for the appointment.

To enable automatic download of routes for a specific user, see the profile option listed in the table.

How to Set Up Profile Options

Here's how you can set up the profile options as a sales administrator:

- Go to Setup and Maintenance and then to:
 - Functional Area: Application Extensions
 - Task: Manage Profile Options
- On the Manage Profile Options page, click the **New** icon in the **Profile Options** section.
The Create page opens.
- Specify the details for the profile options and set Current date as the **Start Date**.
- Click **Save and Close**.
- At the **Profile Option Levels**, set Site to **Enabled** and **Updatable**.
- Click **Save and Close**.
- On the Setup and Maintenance page, go to:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Administrator Profile Values
- On the Manage Administrator Profile Values page, search for the Profile Option Code.
- Create a new value for the **Profile Option** in the **Profile Values** section.
- Select **Site** and set the appropriate **Profile Value**.
- Click **Save and Close**.

Related Topics

- [Create Job Roles](#)
- [Configure BI Dashboard Reports](#)

How You Enable Download of Activities

To help salesperson perform his store visit tasks efficiently, the administrator must complete the configuration. This topic explains the steps to view the activities in consumer goods mobile.

To view the activities on the mobile application, perform the following steps in sequence on the consumer goods web application:

1. Set Up Distribution Center and Routes
2. Create Appointments
3. Run Scheduler jobs

Set Up Distribution Center and Routes

The following steps must be performed in the consumer goods web application. For more information about performing the given steps, see the Managing Distribution Centers and Routes.

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 with the distribution center.

Once you complete the required configuration on the web Application, ensure you download the route and accept in consumer goods mobile.

- If route auto-download is enabled, the route is automatically downloaded and accepted on the mobile application. See Set Up Route Auto-download and Auto-accept: Points to Consider
- If route auto-download is disabled, then you must download and accept the route. See Download Routes in the Using Consumer Goods Mobile guide.

Create Appointments

During appointment creation, 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 specify the values. For more information about creating appointments, see the Manage Appointments section.

Field	Value
Store Visit	Select the check box
Store Visit Type	The store visit type associated with the appointment.
Route	The route that the appointment has been assigned to.
Account	The account associated with the appointment.

Run Scheduler Jobs

The following scheduler 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

For more information about scheduler jobs, see the Enterprise Service Scheduler Jobs section in the Getting Started with Consumer Goods Implementation guide.

Surveys Using Intelligent Advisor

Ensure that you configure your surveys in Intelligent Advisor so that the salesperson can perform surveys during their store visits.

Let's look at the following prerequisites to work with surveys:

1. Author account survey and promotion compliance audit surveys using **Oracle Policy Modeling**.

Note: Follow the instructions in Install Policy Modeling to download. Ensure that you're using the latest version.

2. Use the command-line administration tool to deploy the policy modeling to the hub. Note that you can't deploy it from Policy Modeling.

For more information, see Upload a project from the command line from the Intelligent Advisor documentation

3. Create a record of the survey using the same name used during the creation in Intelligent Advisor and associate the survey with the account.

For more information, see <https://documentation.custhelp.com/euf/assets/devdocs/unversioned/IntelligentAdvisor/en/Content/Guides/Welcome/Welcome.htm> and Managing Surveys in the Using Sales for Consumer Goods guide.

Related Topics

Synchronize Data

As a salesperson, you can sync and refresh the cached data on your mobile application with the server. The application automatically synchronizes your device with the server. You can also perform manual synchronization to sync your changes.

Note: After the first sign-in, the application synchronizes every 24 hours.

Manage Pending Sync Queue

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

To view and synchronize items:

1. Open the Main menu and tap **Pending Sync**.
2. Perform one of the following steps:
 - o Tap **Upload** to sync offline transactions to the server.
 - o Tap **Sync** to upload pending transactions to the server and download data from the server.
 - o Tap **Export All** to upload and sync the log and archived files directly to the server. The archived file contains the data file and captured photos.

Troubleshoot Sync

Pending Sync queue also contains transactions that fail during synchronization process. You can sync these failed transactions during the next sync event. If the sync fails for three consecutive times, you're prompted to export the transaction before the Upload or you can execute the Sync processes again.

4 Consumer Goods Mobile First Steps

Install Consumer Goods Mobile

Use this topic to understand how to install the consumer goods mobile application.

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 must meet the Sales Mobile system requirements. For System Requirements for Oracle Applications Cloud, see: <http://www.oracle.com/us/products/system-requirements/overview/index.html>

Minimum RAM Requirement

The Consumer Goods Retail Execution Mobile application is built using the Oracle Mobile Application Framework. Most device specifications follow the standard mobile application framework certification matrix with the exception of minimum RAM requirements. Minimum RAM requirements for the Consumer Goods Retail Execution Mobile application are 2 GB.

Behavior on Devices Not Meeting Minimum RAM Requirement

Some devices running on less than 2 GB of RAM will completely fail to load the application, while others may be able to operate the mobile application with poor performance.

Install 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.

To find your Host name:

1. Sign in and go to the accounts page or contacts page.
2. View your browser address line.
3. The host name for your company's Consumer Goods application 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`, YOUR host name is `fap001-crm.oracle.com`.

Related Topics

- [Prerequisites Tasks](#)
- [Configure Profile Options](#)

Mobile Application Sign In

Use this topic to understand how to sign into the consumer goods mobile application.

Tip: You can view the consumer goods 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 user name and password.
4. Tap **Sign In**.

Understand Application Settings

To modify your application settings, tap Settings from the Main menu. You can also go to Settings from the login screen by tapping Settings icon.

The available settings parameters for the application are:

Parameter	Description
Host	Host name of your server. For more information about finding your host name, see Installing the Application section.
Port	Port number of your server
BI Host	BI Host name to support BI dashboard and analytics
BI Port	BI Port number
OPA User Name	User Name for Intelligent Advisor Hub
OPA Password	Password for your Intelligent Advisor Hub
Use SSL	Tap to enable or disable SSL

Parameter	Description
Offline Notification	Tap to enable or disable notifications while you're offline
Offline	Tap to enable or disable offline or disconnected mode

5 Accounts and Appointments

Work with Accounts

As a salesperson, you can get a wholesome view of your account and your store visit. Find eligible promotions, order and visit history, store binders in the form of tiles, and other information.

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

To view and update your account details from the route assigned to you:

1. On the Summary tab of the Calendar page, tap the account name to view the profile.

Tip: Alternatively, tap account name on the expanded appointment card on the Appointments tab of the Calendar page to view the account profile.

View your account-specific details like primary contact, address, and other details in the form of tiles. Following account details are displayed in the form of tiles:

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

2. Tap the **Edit** icon.
On the Edit Account page, update your **Account Name**, **Primary Contact**, **Owner**, **URL**, and address related information.
3. Tap **Save**.

Create Accounts

As salesperson, you can now create an account, associate it to a call, and assign it to a route.

1. Tap the **Accounts > Create Account**.
2. On the **Create Account** page, specify your **Account Name**, **Account Type**, **Owner**, **URL**, and address related information.
3. Tap **Save**.
Your new account is created. You can proceed to add contact details.

Note: Creation of new accounts within the mobile application requires access to the Create function of the Accounts REST API. This access is governed by settings and profile options within Accounts, see the Create an account section in the Accounts chapter of the REST API for CX Sales and B2B Service guide for more information. Also see the Oracle Trading Community Architecture User guide.

Add Contacts

You can create, edit, or delete contacts associated with an account.

To create a contact, go to the Contacts tab on the Account detail page and tap **Create** icon.

To edit an existing contact, go to the Contacts tab from the Accounts page and tap the contact. On the Contact details page, tap the **Edit** icon.

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

View and Edit Appointments

As a salesperson, you can plan your day and manage activities from the Calendar.

Once you start the route, you're directed to the Appointments tab of the Calendar page to view the list of appointments associated with your route. Tap any appointment card to view more information.

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

Using the Appointments tab, you can perform the following steps:

- Tap account name on the expanded appointment card to view account information.
- Tap **Location** icon on any appointment cards to view the location of the appointment address.
- Check in to the store by tapping **Check In** on the expanded appointment card.
- Tap **Resume Visit** on the expanded appointment card to resume your store visit.
- Filter the appointments based on the appointment times or statuses.
- Tap **List** or **Map** to switch between appointments list view or map view.
On tablet devices, tap **Detail** or **Map** to switch between appointment detail or map view.
- Search for the appointment using the search bar.
- Tap **Create Appointment** to create a new appointment.
- Tap **Pick List** on the expanded appointment card to view and print complete delivery list for the store visit.
- View individual appointment information by tapping the appointment name on the expanded appointment card. On the individual appointment details page.
 - Tap appointment name on the Summary tab, to view general information such as associated account, complete address, appointment time, and status.
 - Tap the account name to view the information about the account.

- View a list of associated store visit tasks on the Tasks tab.
- View associated notes and analytics reports on the Notes and Analytics tabs respectively. Tap **Plus (+)** icon on the Notes tab to create notes without checking in to the appointment.
- Tap **Edit Appointment** from the **Actions** menu to edit any appointment details.
- Tap **No Service Provided** from the **Actions** menu to provide a reason for not performing the store visit.
- Tap **Resume Visit** from the **Actions** menu to resume your store visit.
- Tap **Create Follow-Up** from **Actions** menu to create a follow-up appointment based on the selected appointment.

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

Related Topics

- [Create Appointments](#)

Create Appointments

As the salesperson, you can create appointments 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 start the route, the Calendar page helps you view the list of appointments associated with the route from the Appointments tab.

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

To create an appointment:

1. Tap the **Actions** menu from the Appointments tab on the Calendar page and select **Create Appointment**.
2. Fill up the required information such as **Name, Location, Start Date, End Date, and Description**.
3. 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. Select an account that's not available in the list, use the search option.

The following values are set automatically when you create a new appointment:

- **Owner** is the user.
- **Store Visit** is set to Y and can only be changed from the web application.
- **Visit Status** is set to Not Started.

Note: The offline mode on your device is automatically disabled for the accounts search option. Once you select the account, the offline mode is reenabled.

4. Tap **Save**.
5. Tap **Pending Sync** from the Main menu. From Actions menu, tap **Sync**.

You can create a follow-up appointment in two ways based on any existing appointment:

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

1. From the appointment details view:
 - a. On the Appointments tab, tap an appointment name to go to its detailed view.
 - b. From the **Actions** menu, tap **Create Follow-Up**.
2. From the check-in tab:
 - a. On the Appointments tab, check in to an appointment.
 - b. On the tasks tab, tap **Create Follow-Up** from **Actions** menu.

Salesperson can also create the required call records to cater to on-demand and unscheduled appointments.

Related Topics

- [View and Edit Appointments](#)
- [How can I continue my store visit after I navigate away from the Appointment List page?](#)
- [Why can't I view the activities?](#)

Mobile Usability Enhancements

As the sales representative, you can now use these usability enhancements:

- Barcode Scanning
- Launcher
- Inventory Transfer
- Manage Signatures
- Manage merchandising materials and allocation
- Inventory Audit Attachments

Sales representatives can also create ad-hoc call records to cater to on-demand and unscheduled appointments.

Manage Contracts in Mobile Application

Contracts help you create retail agreements by specifying terms, conditions, check compliance, reward suppliers and customers. You can manage agreements using contracts. Here's how you can create and monitor contract for minimizing risks, maximizing financial performance, and operational efficiency.

Here's how you can manage contracts from the mobile application:

- Create contracts quickly from the template with its benefits, terms, conditions, tasks, and more.
- Filter and view the contract templates by status, start date, and end date.

- Create and manage all benefit types.
- Define the benefits, conditions, and terms for your contract.
- Create conditions from the condition templates from the mobile applications.
- Estimate your contract costs for negotiation and fund allocation.
- Verify the success of terms and conditions of a contract.
- Add activities as part of contract tasks.
- Automate compliance and payment settlement schedules.
- Reward the beneficiaries with the contracted benefits.

You can create **Contracts** and **Contract Templates** from the web and mobile applications.

Create Contract

As a salesperson, you can now use contract template as a blueprint to instantly create contracts. You can create multiple contracts quickly from the available contract templates which in turn can improve retail efficiency and speed. Let's see how to create a contract from the available templates:

1. Go to **Contract > Create**.
2. Specify the values for the fields such as the contract name, renewal, and settlement details.
3. Click **Save and Close**.

Contract is now created with benefits, terms, conditions, compliance, settlement, and cluster from the template.

Follow the on-screen instructions to do the following tasks:

- View and edit the benefit, renewal, settlement, and compliance information.
- Create additional benefits, conditions, and terms for an existing contract.
- Add photos as attachment for condition fulfillment.
- Apply the benefits in the shopping cart for the products associated with **Product Benefit**
- Create manual settlement and compliance override.
- View contract forecast, check attainment, verify compliance history, and settle the contract.

Here's a sample procedure that explains how to perform a task.

Create Compliance Override

You can override a benefit compliance that's evaluated. To override the compliance, remember that the contract is active and the compliance is already evaluated for the associated benefit. You can change the benefit compliance status between the two available options; **compliant** and **noncompliant**.

1. Sign in as a salesperson.
2. Go to **Account > Contract > Benefit**.
You can see a list of the available value and cumulative values of the compliant benefits.
3. Go to **Compliance History > Edit** to view and edit the compliance history associated with the Benefit.

Note: You can override only the latest compliance history record.

4. Click **Save**.

5. Select the latest compliance history record. Go to contracts summary page, select **Actions > Approve Contract** to activate the contract.

For more information about **Contracts**, see the contracts section of Using guide.

6 Route Management

Download Routes

To enable a retail store visit, the salesperson must accept the route to see the set of appointments. When the Route Auto-download is disabled, the sales administrator must first download the routes manually 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 are auto downloaded to the device.
- The sales administrator must have the `ZEM_ALLOW_PRIVILEGED_ACCESS` privilege to download routes.
- If you disable route auto-download, ensure that the appointments are created by sales administrator only and the sales administrator is added as a resource for the appointment.

If the automatic download isn't enabled, you must perform the following steps to download routes to the device:

1. Select your route from the list of routes or search for the route and drill down on the route.
2. Tap **Download**.
3. When the route download is complete, sign out of the application.

The downloaded package contains the route, appointment, and attachment files.

Related Topics

- [Configure Profile Options](#)

Start the Routes

As salesperson, you accept the route by checking in to an appointment and start your store visit.

To start the route that's assigned to you:

1. On the Summary tab of the Calendar page, review the summary information about the downloaded route.
2. Tap **Accept**.

After you Accept a route, you can navigate to the Appointments tab to review your appointments for the day.

Note: If the route auto-download is enabled, the route is automatically accepted.

3. Tap **Start** to begin the route.

You can see the current date, time, and location in the application when the route starts.

Note: If your route has been assigned with a category, you can see products and promotions related to that category. For more information on configuring profile options, see the profile options topic in the Getting Started with Consumer Goods Implementation Guide. To understand settling routes, see the Route Inventories topic.

Verify and Submit Route Inventory Transactions

As a salesperson, you can close your route at the end of the day after the completion of your appointments for the day.

Route settlement includes,

- Review of the vehicle for goods and meter reading.
- Review of the van inventory by the distribution center inventory checker. This review verifies the inventory, matches the order deliveries, and accept the return of the inventory.
- Review of the payments including collections, cash audit, credits, and vouchers against the payment records.

The distribution center inventory checker verifies the route inventory, route reload report, and the route inventory transactions. Based on the report, salesperson 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 `ZEM_ALLOW_INVREPORT_ACCESS` granted to your job role to perform this task.

2. Tap **My Inventory** from the Main menu.
3. View the inventory and update the fields per your requirement.
4. Tap **Submit** to submit the inventory transaction which enables the creation of the route inventory transactions report.

You can also verify and submit the route inventory reload transactions.

Close Your Route

After you complete all the store visit tasks and checking out of the appointments, settle and close your route at the end of the day.

Before you close your route, you must check out of all the appointments associated with the route. When the appointment isn't complete, you must select a valid reason before you can close the route.

Upon arrival to the distribution center at the end of the day the salesperson starts the settlement process. The salesperson can also review the route summary, available documents, and expenses incurred for the route during the visit.

To settle and close the route:

1. After checking out of all the route appointments, tap **Finish** on the Summary tab of the Calendar page.

This captures the current date, time, and geo-location.

Note: If you haven't provided services to a store, select a valid reason for the corresponding appointment as prompted while closing the route.

2. Tap **Settle** to proceed with route settlement.
 3. On the Settle Route page, review and correct route settlement details such as,
 - Payments made using cash, vouchers, coupons, and so on.
 - Payment-related documents like payment receipt, bank deposit receipt, and others.
 - Expenses incurred on the route by salesperson.
 - Payment overage or shortage.
- Note:** You can adjust the balance by recording cash, expenses, or shortage amount. The balance must be zero to close the route.
4. Tap **Actions** and 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 salesperson in the route.
 5. After you review the route settlement details, select **Print** to generate a .pdf file for the route settlement report on your mobile device. You can print the route settlement report any time after closing the route.

Tapping Print marks the route as settled and closes the route.

7 Store Visits

Check In to a Store Visit

As a salesperson, after you sign in, review appointments for the day on Appointments tab. Use list to view items for delivery to store. You can also get directions to store by using location option on the appointment card.

To check in to an appointment:

1. Tap **Start** on the Appointments tab.
2. After checking into a route, on the Appointments tab, tap an appointment card to expand it.
3. Tap **Check In**.

This logs the time and your geo-coordinates.

4. You can now select the in-store activities to perform on the Tasks tab.

For some reason, when you aren't able to provide the service to the store, select the appropriate reason using the following steps:

1. Tap the appointment from the list to navigate to the appointment page.
2. Tap the Actions menu and then **No Service Provided** from the menu.
3. Select an appropriate reason and tap **Submit**.

This saves the status of the appointment as **Not Serviced**.

You can warn the salesperson when they check in or check out of the preset radius to the stores by creating the profile options. For more information, see [Configuring Profile Options](#) in this guide.

Related Topics

- [View and Edit Appointments](#)
- [Perform Store Visit Tasks](#)

Perform Store Visit Tasks

As sales representatives, when you check into your appointment, you can view the store visit tasks assigned to you on the Tasks tab. Tap the task to see the selected task.

Here's a list of the standard store visit tasks:

- Merchandising Material Order Capture
- Order Capture
- Inventory Audit
- Survey
- Promotion Presentation

- Promotion Compliance Audit
- Account Task
- Order Delivery

Tasks that are marked with* are mandatory and you must complete them before you check out of the appointment.

Tap the radio button for the task on the tasks bar to mark it as finished. When you mark a task as finished, you're navigated to the next incomplete task from the beginning. To mark multiple tasks as finished,

1. Navigate to **Actions** menu, select **Task Progress**
2. On the Task Progress page, select **Yes** for the tasks you have finished.
3. If you don't complete a mandatory task, select an appropriate reason from the list.
4. Once all your tasks are marked as complete, click **Check Out** to check out of the appointment.
5. At the end of an activity, you can capture the signature. Clear the signature till you sign accurately.

Note: You can capture the signature retry count between check-in and check-out for future reference.

For more information on setting up and performing the store visit tasks listed, see the Getting Started with Consumer Goods Implementation and the Using Consumer Goods Mobile guides respectively.

Manage Ad-hoc Tasks

As an administrator, complete the following configuration activities to enable ad-hoc tasks capability:

- Duplicate the Standard layout.
- Add custom requirements, for example add **Add Task** field, set the layout to **Active** , and save.
- Go to **Application Composer > Mobile Application Setup > Oracle Sales Cloud Retail Execution > Check-In**.

Once you complete these steps, your sales representatives can start adding ad-hoc tasks during their store visit.

Add Ad-hoc Tasks

As a sales representative, you can now add or remove ad-hoc **Store Visit Tasks** from **Appointments** in addition to the assigned tasks. Tap the **Calendar > Call > Task > Add Task** to add, execute, and remove ad-hoc tasks from the available list. Remember you can add or modify tasks before or during the call.

Note: You can remove the ad-hoc tasks that you created by swiping the task to the left.

Manage Notes

As a sales representative, you can create notes about your retail visit and attach the note to the appointment. You can thereafter create, edit, or delete your notes to store all the information associated with your account.

To create, edit, or delete notes:

1. Tap **Accept** and **Start** on the Landing page.
2. On the Landing page, tap the Appointments tab. On the Appointment List page, tap **Check In** into an appointment card.

3. On the Tasks List page, select the Notes tab.
4. To create a note, tap the **Plus** icon.
5. To edit a note, swipe and tap **Edit**.
6. To delete a note, tap **Delete** from the Actions menu.
7. Tap **Save**.

Related Topics

- [Do I have to check in to an appointment every time I create or edit notes in the mobile or tablet application?](#)

Manage Photos

As a salesperson, you view, take, edit, or delete a photo while performing your store visit activities. Managing photos enables you to support your store activities.

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

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

Related Topics

- [Can I edit photos for a store visit without checking into an appointment?](#)

Launcher

As a salesperson, you can easily navigate to your orders, products, visits, and more by clicking + icon. The launcher interface helps you to have a more seamless experience of navigating between other aspects such as orders and visits.

Use Launcher

As a salesperson, you can click the plus icon and switch between the objects easily with the new Launcher feature. Here is what you can do with Launcher:

- Switch between the objects such as orders, products, visits, and more.
- Add or modify the sequence of the objects for quick navigation from application composer.

Manage Display Locations

As a sales administrator, you can create display locations for better visibility and sales. Once you set display location for your product, your salesperson can verify, modify, or create display locations. Effective display location helps products reach sales potential.

To view or edit available display locations:

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

To create a display location,

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

To delete an existing display location, swipe left on the display location and tap the **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

- [Perform Inventory Audits](#)

8 Survey Management

Perform Surveys

As a salesperson, you can perform account and promotion surveys as part of your store visit tasks.

Work with Intelligent Advisor Hub

To execute an account survey, enter your Intelligent Advisor hub credentials when you sign in to enable download of survey templates.

1. Tap **Settings**, from the Main menu.
2. On the Settings page, enter your user name and password as given by your sales administrator.
3. Click **Save**.

After user authentication, the Intelligent Advisor survey templates are downloaded directly from the hub.

Perform Account Surveys

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

1. On the Landing page, tap **Accept** route followed by **Start** route.
2. On the Landing page, tap the Appointments subtab.
3. Tap **Check In** on an appointment card on the Appointments List page.
4. On the Tasks List page, Tap **Surveys**.

The lists of account surveys available for an account are displayed.

5. Tap a survey to view the details.
6. Fill your responses for the survey and click **Save** to save the response.
7. To edit the survey, tap **Edit**.
8. On the Tasks List page, select **Survey**, to mark the task as complete.

Perform 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 hub credentials when you sign in to enable download of the templates.

To carry out a promotion compliance audit:

1. On the Landing page, tap **Accept** route followed by **Start** route.
2. On the Landing page, tap the Appointments subtab.
3. Tap **Check In** to an appointment.
4. Select **Promotion Compliance Audit** task on the Tasks page.

The lists of promotion compliance audit surveys for an account are displayed.

5. Tap a survey to view its details.
6. Fill your responses for the survey and click **Save and Close**.
7. 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.

Related Topics

- [Surveys Using Intelligent Advisor](#)

9 Product Assortments

View Product Assortments

As salesperson, view and sell the account product assortments available in the priority products.

As part of retail operations, you can plan and roll out the product assortments to retail accounts. A product assortment consists of a list of products that the manufacturer wants the salesperson to sell to the retail accounts. The salesperson views these products to support the 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. On the landing page, tap **Accept** route and then **Start** route.
2. After checking into a route, tap the Appointments subtab on the Landing page.
3. On the Appointments List page, tap **Check in** to an appointment card. On the Tasks List page, tap the Product Assortments subtab.
4. 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, see Using Consumer Goods Guide.

10 Shopping Cart and Orders

Understand Order Statuses

Here's a quick summary of the statuses that an order can have after you create it.

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

Create Orders from the Shopping Cart

Here's how you create orders during your store visit using the shopping cart.

As a salesperson, you can add the 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 Shopping Cart page
- Order Category, Contract, and Distributor from the list

Note: If your route has been assigned with a category, you see the products and promotions associated with that category.

The product selection page lists the priority products followed by the regular products. You can see the priority groups that are configured in the priority portfolio associated with the account. Priority Portfolio consists of the product groups that are displayed on the Priority Group section on the Products page.

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

1. On the Appointments tab of the Calendar page, expand the appointment card, and tap **Check In**.
2. On the Tasks tab, tap the Shopping Cart icon.
3. Select and add products from one or multiple templates, priority groups, or assortments:
 - a. Select and add the products.
 - Note:** You can add products from multiple templates, groups, or assortments.
 - b. Specify the required quantity for each product. After picking one product from shopping cart picker, if that product is set to a preferred UOM, then upon selection, the value will be different. That is, it will take the preferred one as the default value.
 - c. Add any valid UOM to UOM conversion picker if user wants to change the preferred UOM to any valid UOM for this assortment line.
 - d. The current shopping cart UOM is always in sync with products, priorities, and template.
4. To add promotions:
 - a. Tap **Promotions** from the **Actions** menu.
 - Note:** The **Actions** menu isn't available if there are products or promotions added to the cart. In this case, tap **Promotions** icon on the page header to add promotions to the cart.
 - b. Tap the promotion on the Promotions page.
 - c. Add the products and enter a quantity as required and tap **Add All to Cart**.
 - d. Tap **Back** icon twice to return to the Shopping Cart page.
5. Once the shopping cart is updated, click **Submit** to create an order.

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

Additionally, as a salesperson, you can add order category, order contract, and distributor while capturing the order.

For more information about shopping cart templates and priority products, see the Using Sales for Consumer Goods guide.

Update and Cancel Orders

As a salesperson, view, update, or cancel order through shopping cart during store visit appointment. Shopping cart lists products to order. Get store managers to sign order and submit with their authorization along with captured signature saved with order.

Note: From a shopping cart, you can create multiple orders as orders are grouped by their legal entity. When the products in the cart don't have legal entity association, a single order is generated for the products. For more information about adding products to shopping cart and creating orders, see Managing Shopping Cart and Creating Orders.

Update Orders

As a salesperson, view the order details created in the mobile application and the orders downloaded from the server:

1. On the Landing page, tap **Accept** route and then **Start** route.
2. After checking into a route, tap the Appointments tab on the Landing page.
3. Tap **Check In** and navigate to the Orders tab from the Tasks List page.
4. Filter and view your order list by **Orders pending delivery** or **Recent Orders**.
5. 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 updated.

To cancel an order:

1. Navigate to the Orders tab 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.

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

Use Barcode for Order Capture

During your store visits, you can now capture orders by quickly adding the products and their quantity using the barcode scanner:

What's a Barcode?

A barcode is an optical machine-readable representation of data. In retail industry, you can use barcodes to quickly capture orders, audit the inventory, and other field activities. As salespersons, you can scan the barcodes using barcode scanners from your mobile application. When you scan a barcode, you add the products associated with that barcode to the order quickly.

1. Go to the **Order Capture > Cart > Add Products**.
2. On the product picker page, tap Products and the camera icon menu, tap **Scan Barcode**.
3. Scan the product barcode.
On the successful scan, the product detail page appears.
4. Add or modify the product quantity and other product information.
5. Click Done to see to the updated order from the **Order Capture** page.

Related Topics

- [Create Orders from the Shopping Cart](#)

Return Products and Containers

As a salesperson, here's is how you can manage the return of the products and containers.

Return Products

You can create a return order for products from the Orders tab.

To return products:

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

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

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

You can return product by orders too.

Return Containers

You can return containers from the Containers tab.

On the Containers tab,

1. Tap **Return Containers** from the **Actions** menu.
2. Tap the **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're added.
4. Tap **Order**.

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

11 Promotions

Understand Promotion Types

You can understand various trade promotions types and their use to increase your sales.

You can add same promotional unit to the shopping cart more than once, provided that discount is different. You have the following types of promotions:

- **Fixed Discount:** Indicates a fixed monetary amount or percentage applied to participating products.
- **Fixed Combination:** Indicates the groups of SKUs bundled and sold together and can't 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:** Indicates the groups of SKUs bundled together and have some fixed items and 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:** Indicates the discount 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 the product the customer buys. In step discount, the discount is valid only on a specified range.

Note: For fixed discount promotions, the last promotion marked as mandatory is automatically applied to the shopping cart items added at the list price.

Add informational content about promotions as store binders to the account from consumer goods web application. You can access them from Store Binders tab after you check in to the appointment.

To view complete details of any promotion, tap **Promotion Presentation** task on the Tasks tab after you check in to the appointment. You can navigate to a specific promotion to present that promotion to the store manager during your visit.

Related Topics

- [Add Promotions to the Shopping Cart](#)

Add Promotions to the Shopping Cart

As sales representatives, you can discuss the promotions and their approval with the store managers. You can specify the quantity and add the promotions to the shopping cart.

Note: If your route has been assigned with a category, you see promotions that belong to your category.

To add promotions to the shopping cart:

1. Sign in as a sales representative and check in to the appointment.
2. On the Tasks tab, tap **Promotion Presentation**.
3. On the Promotions page, view a list of active promotion types.
4. Select the promotion type and edit the relevant fields from the following discount types available:
 - o Fixed discount
 - o Fixed Combination
 - o Dynamic Combination
 - o Volume discount
5. Tap the product, to navigate to the Promotion Product Details page.
6. Update the quantity and the eligible item discount of the promotion.
7. 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.
8. 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.

You can also add promotions to the cart from Shopping Cart page itself. See Manage Shopping Carts and Create Orders for more information.

Related Topics

- [Understand Promotion Types](#)
- [Create Orders from the Shopping Cart](#)

12 Direct Store Delivery Tasks

Deliver Shipments

You perform order delivery as part of your store visit tasks. When you submit an order, the ERP processes the order and creates product shipments. You can deliver the shipments generated for the order to the retail stores.

After delivering your shipment, you can collect the payment for the generated invoice.

To deliver shipments:

1. On your application, tap **Accept** and **Start** for route check-in.
2. Tap the Appointments tab and **Check In** on the Appointments tab of the Calendar page.
3. On the Tasks List page, tap **Order Delivery** from the list of store visit tasks.
4. View shipments generated from the order and tap a shipment for its details to confirm with the store manager.
5. Tap **Deliver**.
6. Verify the items of the shipments with the store manager and collect the store manager's signature for the delivery invoice.
7. Tap **Submit** to submit the delivery.

Note: When the delivered product is part of the shipment from a loaned container, check the maximum limit on the containers. When the number of loaned containers exceeds the limit, you can return containers or collect the payment for the additional containers. You can return the containers from Containers tab. If you opt to pay for the additional containers, they're added to the generated invoice.

Once the invoice gets generated, you can print the invoice to collect the payment.

To cancel a shipment delivery, tap **Cancel Shipment** from **Actions** menu on the shipment details page. You can't edit the shipments that are canceled. You can activate the shipment for delivery by tapping **Activate Shipment** on the shipment details page.

Manage Order Invoices

View your order invoices from the Invoices tab of the Check In page.

To print the order invoice:

1. After submitting the shipment delivery, review the order invoice.
Alternatively, you can open your invoice from the Invoices tab on the Check In page.
2. From Actions menu, tap **Print** to generate a PDF file for the invoice on your mobile.
3. Use the print functionality provided by your PDF Viewer to print the document.

Tip: After delivering a shipment, you can review and print your order invoice to enable collection of payment from the **Check In > Invoices** tab.

Manage Payments

You can collect payments against an invoice after the shipment delivery.

To capture your payment:

1. 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 tab on the Tasks List page.
2. On the Payments page, select a payment to navigate to the Payment detail page
3. 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.

If one of the credit lines for the account has a balance due, you see a notification.

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 can't redeem the store credit immediately after it's issued, if the profile option for store credit is set to Back Office. See *Configuring Profile Options* for more information.

4. Tap **Accept** after you finish editing it.
5. The Summary page provides you with summary of all the products returned or delivered along with payment summary.

Take signature of the store manager and 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.

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

Tip: You can create and edit a payment for a delivery by navigating to the Payments tab in the Tasks list page. Tap the plus icon on the Payments tab to launch the Create and Edit Payment page. Tap **Save** when you're done to save your changes.

Related Topics

- [Configure Profile Options](#)

Deliver Shipments in Express Delivery Mode

As a sales representative, you can deliver your shipments using the express delivery mode for operational efficiency.

When you enable the express delivery mode, you can:

- Deliver multiple shipments using the Order Delivery page.
- Make payments for all the shipments on the same page.
- Return products and containers from the Order Delivery page.

You can complete all the product deliveries, returns, and payments from the Order Delivery page.

Note: Express delivery mode is only available for mobile devices. You must set the profile option `ORACO_EXPRESS_DELIVERY` to `Y` to enable express delivery of shipments. For more details, see [Configuring Profile Options](#).

Deliver Shipments

To deliver multiple shipments when express delivery is enabled:

1. On the Appointments tab of the Calendar page, expand your appointment and tap **Check In** to start your store visit.
2. Tap the **Order Delivery** task on the Tasks tab of the Appointments page.

The Order Delivery page displays the list of all the shipments that are ready for delivery.

3. At this point, you can do the following before delivering shipments:
 - a. Review your shipment details by expanding each shipment.
 - b. Tap **Edit** icon to edit the order associated with the shipment and add or remove products.

The Edit Order page, you can only add products for which spares are available with you. If your route has been assigned with a category, you see the products from that category.

Note: If you edit a shipment, the product prices may change and any associated promotions may become invalid. After you update the order, the shipment name is prefixed with `updated` on the Order Delivery page.

- c. Tap **Returns** to return products and containers. For more information, see [Returning Products and Containers](#) section in this topic.
4. Tap **Deliver**. At this point,
 - o If you exceed maximum containers limit for the account, a warning message appears. You can either return the containers or pay for the additional ones. If you tap **Return**, Returns page appears where you can add containers to return and adjust their quantities.

If you tap **Pay** for the additional containers, shipments are delivered. On Payment page, you can capture payments for all the shipments and additional containers.
 - o If your shipment has returnable containers linked to the products, you can return these containers by tapping **Yes** on the message prompt.
 5. Payment page appears after the invoices are generated for all the delivered shipments. You can collect payments for all the delivered shipments by expanding each payment section and selecting payment methods. For more information about payments, see [Delivering Shipments](#).

Return Products and Containers

Express delivery mode enables you to return products and containers using a single page.

To return products and containers:

1. Tap **Returns** on the Order Delivery page.
2. Tap **Plus (+)** icon next to Products, select products to return, and tap **Add**.
3. Tap **Plus (+)** icon next to Containers, select containers to return, and tap **Add**.
4. Tap **Submit**.

Note: You can also return products and containers separately, from the Orders tab and Containers tab respectively. For more information, see Returning Products and Containers.

Cancel Shipments

You can cancel the delivery of all the shipments at the same time by tapping **Order Delivery > Actions > Cancel Shipment**. Once you cancel the shipment, you can't make any updates.

You can activate the canceled shipments by tapping **Activate Shipments** from **Actions** menu. You can update the shipments for delivery.

View Credit Lines and Credit Notes

As salesperson, approve credit line with one or more credit notes during visit. Use credit lines to make payments toward invoice and outstanding credit lines. Credit lines help as source of funds for ready use at retail stores discretion.

View Credit Lines

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

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

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

5. Select a credit line to view the details on the Credit Lines Details page such as credit line number, account, and amount used.

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 indicating 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.

Pay for Credit Lines

To pay toward a credit line and credit note:

1. 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.
2. On the Create Payments page, provide details and tap **Save**.

Deliver Ad-Hoc Orders

As a sales representative, 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.

See [Creating Your Orders from the Shopping Cart](#).

2. After order creation is complete, navigate to the Order Details page and tap the Summary tab. Select the **Actions** menu and tap **Deliver**.
3. On the Deliver Order page, review the details and capture the store manager's signature, name and date and tap **Submit**.

Order Invoice page appears.

Note: A product delivered as a part of the shipment is related to a container. When the number of loaned containers for the products exceeds the maximum limit, return the containers or pay for the additional ones.

4. To review and print invoice and to capture payment, see [Delivering Shipments](#).

Related Topics

- [Deliver Shipments](#)
- [Create Orders from the Shopping Cart](#)

13 Route Inventory and Inventory Reload

Manage My Inventory

As sales representative, use My Inventory to assess route inventory based on products loaded in trucks and reloading requirements. Each sales representative is assigned to route. Sales administrators can use My Inventory to manage inventory details and reload activities.

As a sales administrator, you 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
- **Non-Sellable:** Consists of items that aren't for sale

Note:

- When route assortment isn't available, non-sellable items are hidden.
- When an item isn't included in the route assortment, it's considered as sellable.

Manage Route Inventory

You can view the inventory of your delivery vehicle to ensure it's well stocked at the beginning of the day. 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 Main menu, tap **My Inventory**.
3. On the Inventory List page, expand **Sellable Inventory** or **Non-Sellable Inventory**.
4. Specify the Sellable reason and Unsellable reason.
5. 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.
6. 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.

Manage Inventory Reload

You 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 Main 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.
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?](#)

Perform Inventory Audits

As a salesperson, perform the inventory audits to take a stock of your inventory, shelf stock, facing, location, demand, and shortage. During your inventory audit store visit task, you can also edit the placement, images, and other details.

To perform an inventory audit:

1. Tap **Accept** followed by **Start** to perform route check-in.

2. On the Landing page, tap the Appointments tab.
3. Tap **Check In** on an appointment to go to the Tasks List page and then tap **Inventory Audit**.

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

4. Navigate to the Details page by drilling down on a product.
5. Edit product details like out of stock, shelf stock, facing, photos, and others per your requirement.
6. To associate a display location to this inventory, tap **Display Location** and select the location to be associated.
7. To restock on products that are low in quantity, tap **Add to Cart** to add them to the shopping cart.

You can enable the photo capture for each store inventory line by creating a profile option and setting its value to Y. For more information about enabling photo capture, see Profile Options.

Transfer Route Inventory

As salesperson, you can transfer the route inventory with another salesperson. When your customer places an order quantity higher than the available inventory, you can quickly search if another salesperson on the route has any surplus inventory and can agree to exchange the inventory.

- Transfer Inventory using the **Exchange** option.
- Transfer Inventory using the **QR Code** option.

Inventory Transfer using Exchange

To exchange route inventory by manually entering the products and quantities on their devices:

1. From the Main menu, tap **My Inventory**.
2. On the **My Inventory** subtab, tap the Actions menu, and tap **Exchange**.
3. Tap the user image of the salesperson.

The list page contains names of the salesperson and their route names.

Tap **Location** icon on the Action wheel to gauge the distance of the salesperson from you. Using Actions wheel, you can **Call**, **Message**, or **Email** the other salesperson. You can communicate and connect with the other salesperson for determining the location of the exchange.

Christy, a salesperson, is visiting Small Inc. per her route allocation. Christy has 40 fizzy drink bottles in her trunk, however, the customer places an order for 100 bottles. Using Exchange option available on the My Inventory page, Christy finds that Amir, another salesperson, is on the route with 60 surplus bottles. Both the salespeople agree upon a location to exchange the products. 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 the following details on the page:
 - **Inventory:** Product name for exchange. For example, fizzy drink bottles.
 - **Quantity:** Number of surplus items to be transferred. In this example, 60
3. Tap **Submit**.

Note: You can also transfer the inventory by scanning the QR code.

Amir also performs a similar procedure on his device by selecting Christy's route and tapping **Transfer** on the Exchange page.

Inventory Transfer using QR Code

Now, your salesperson can exchange the route inventory easily by scanning the QR code without manually entering the products and quantities. You can also verify and authenticate the transfer of the inventory.

1. From the sender's route inventory page, tap **Transfer**.
2. Add and update product quantities per your requirement and availability.
3. Click **Submit**

QR code is generated on the sender's device.

4. From the receiver's route inventory page, Tap **Receive**.

QR code reader scans the sender's QR code and confirms the scan.

5. Once the code is recognized, the receiver's device verifies the products and generates another QR code for verification purpose.

The sender confirms the transfer from his end too.

6. From the sender's device, tap **Scan Confirmation**.

QR code reader scans the confirmation QR.

7. Click **Confirm** to complete the transaction on sender's device.

14 How to Extend Consumer Goods Mobile

Associate Custom Tasks with Custom Objects

As an administrator, associate your custom task with a custom object in consumer goods 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 select the custom object API name that you want to associate your task with, and add your custom object to the designer.

1. Create a sandbox.
2. While creating your custom task using web application on the Store Visit Tasks page, fill in the **Code** field to associate a custom object with the task that you're creating.
 - o Create your target custom object for your custom task.
 - o Create a one-to-many relationship between your source object and target custom object. Your source object can be either Activity or Account.
 - o In the Detail view of Mobile Application Composer, add your target custom object as a subtab of your source object.
 - o Create a store visit task for your custom object with `TaskCode as Activity + APIName Of Organization + APIName`, depending on your source object. For example, if API name is ActDetailing_c,
 - `TaskCode: ActivityActProductDeatiling_c`, if your source object is Activity.
 - `TaskCode: OrganizationActProductDetailing_c`, if your source object is Account.
 - o Add the new store visit task to a store visit type and use it in your store visit appointments.
3. In Application Composer, select **Sales** from the **Applications** list.
4. Click **Common Setup > Mobile Application Setup**.
5. In the Oracle Customer Experience Cloud Mobile Applications page, tap the application.
6. Select your custom object from the **Available Features** pane and move 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** on the **Feature Details** pane.
9. Download the sandbox on your mobile device.
10. Select the sandbox that contains your configurations and tap **Save**.
11. Check your configurations.
12. Once you have verified that the configurations are correct, sign in to the web application as the same user, 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.

Extend Consumer Goods Mobile

As a sales administrator or implementor, you can extend the consumer goods mobile application using Application Composer.

You can use Application Composer to perform the following based on your need:

- Extend the objects and fields in the mobile or tablet.
- Show or hide the objects and fields from the user interface.

Here's how you extend the mobile application:

1. Select the sandbox you want use for your extensibility configurations.
2. Click **Navigator > Application Composer**.
3. Select the **Sales** application.
4. Select **Common Setup > Mobile Application Setup**.
5. Tap the application.

Note: For more information on how to extend mobile applications, see the section Oracle CX Enterprise Mobile in the Extending Sales guide. The topic Adding Oracle Business Intelligence Reports to a Sales Object's Analytics tab in this section doesn't apply to the mobile application.

This table lists the objects along with what you can extend in each of the objects.

Note: `Not applicable` in the table refers to features that aren't applicable to the object. `No` refers to features that aren't yet implemented in the application.

Object Display Name	Object API Name	Configure Fields	Configure Child Objects	Show or Hide Actions	Dynamic Layout
Accounts	<code>__ORACO__Accounts_c</code>	Limited to detail view	Yes	Not applicable	Yes
Appointment	<code>__ORACO__Activities_c</code>	Yes	Yes	Yes	Yes
Inventory Audit	<code>__ORACO__Inventory_c</code>	Applicable to list and edit view	Not applicable	Limited to list view	Yes
Promotion	<code>__ORACO__Promotion_c</code>	Applicable to list and detail view	Not applicable. Read-only object	Yes	Yes
Check In Page	NA	Not applicable	Limited to addition of child and related objects of Accounts and Activities. These are added as subtabs on Check In Page.	Yes	Yes
Route	<code>__ORACO__Route_c</code>	Limited to detail view	Yes	Yes	Yes

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

Object Display Name	Object API Name	Configure Fields	Configure Child Objects	Show or Hide Actions	Dynamic Layout
Product Assortment	__ORACO__ ProductAssortment_c	Applicable to list and detail view	Yes	Not applicable	Yes
Cart	__ORACO__ ShoppingCartDSD_c	No	No	No	Yes
Promotion Products	__ORACO__ PromotionProductCo c	Yes	No	No	Yes
Cart Items	__ORACO__ ShoppingCartItemCo c	No	No	No	Yes
Order	__ORACO__ OrderDSD_c	Yes	No	Yes	Yes
Order Items	__ORACO__ OrderLineDSD_c	No	No	No	Yes
Shipment	__ORACO__ ShipmentDSD_c	No	No	No	Yes
Shipment Lines	__ORACO__ ShipmentLineDSD_c	No	No	No	Yes
Route Inventory	__ORACO__ RouteInventory_c	No	No	No	Yes
Account Credit	__ORACO__ CreditLineDSD_c	Yes	No	Yes	Yes
Payment	__ORACO__ PaymentDSD_c	Yes	No	Yes	Yes
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

CAUTION: You can add a custom field for currency to the detail or list view of these objects: Order, Payment, Payment Line, Order Line, Credit Line, Credit Note, Invoice, Invoice Line. However, you must create the currency field as a field of type number to add it to these objects.

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

Additional Configuration for Some Objects

For these objects, you must also run the Enterprise Scheduler Service job **Enable Consumer Goods Object Extension for Mobile Application**. You must run this job only after you add the custom fields and publish your sandbox.

Object Display Name	Object API Name	Enable Force Inclusion in Download
Payment	__ORACO__PaymentDSD_c	No
Account Credit	__ORACO__CreditLineDSD_c	Yes
Order	__ORACO__OrderDSD_c	Yes

For some of these objects, you must also enable force inclusion in download.

Here's how you can enable force inclusion in object download,

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

Mobile Scripting

As an administrator, you can write custom scripts for the consumer goods application to support your business logic and requirements. You can add custom logic for selected events and objects in your offline mobile and tablet applications.

Extend Your Custom Logic with Scripts

Set up your app to match your business requirements by writing custom JavaScript, whether you're online or offline. Create scripts for any top-level object and trigger an event of your choice. For example, you can create a script that makes the product field mandatory when you create an opportunity. Here are the supported types of validations and rules:

- **Calculated fields:** Indicates the field values for calculated fields
- **Field validations:** Validates that field values are allowed on data entry

- **Action validations:** Validates whether an action can be taken or not under certain conditions.
- **Mandatory fields:** Conditionally makes the fields mandatory.
- **Read-only fields:** Conditionally makes fields read-only.

How to Create a Script

You can create custom scripts for a specific object or for all objects. Here's how you create a custom script for a specific object:

1. Select the sandbox you want to configure.
2. Select **Navigator > Application Composer > Mobile Application Setup**.
3. In the Application Feature pane, select **Settings**.
4. Click **Scripts Settings** and enable the **Enable Scripts** option.
5. Click **Save** in the top right-hand side of the Application Composer page.
6. Click the **Scripts** tab on the **Mobile Application Setup** page.
7. Select the object you want to write a script for and then select the event that triggers your script. You can select one of these triggers:
 - **On Create** (triggers the script while creating a new record in the mobile app)
 - **Before Save** (triggers the script before saving the record)
 - **On Field Value Change** (triggers the script when you change the value of a field and then tap out of the field)
 - **After Save** (triggers the script after the app saves the record)
8. Click the plus icon in the **<Event Name> Scripts** section.
9. Enter the script name and description.
10. (Optional) If you want the script to work for a particular region, select the geographical region. The script works for those who have your selected regions as their country preference setting in your sales application.

Note: Remember, you can have only one script per region for an object and an event. For example, you can create a script for an opportunity, for the On Create trigger, for the UK region. To include a different region for the same object and event, create another script. For example, create a script for an opportunity, for the On Create trigger, for the US region.

To restrict your script to trigger for certain roles, specify these by writing a JavaScript.

11. Click **Create** and create your script.
12. Click **Validate** to check whether your script has any errors.
13. Click **Save**.

Supported Objects

Here is the list of standard and custom objects that support mobile scripting and different actions:

Object Name	onCreate	beforeSave	afterSave	onFieldValueChange
__ORACO__Inventory_C	No	Yes	Yes	Yes
Activity	Yes	Yes	Yes	Yes

Object Name	onCreate	beforeSave	afterSave	onFieldValueChange
__ORACO__ShoppingCartDSD_c	No	Yes	Yes	No
__ORACO__RouteInventory_c	No	Yes	Yes	No
__ORACO__InvoiceDSD_C	No	Yes	Yes	No
__ORACO__InvoiceLineDSD	No	Yes	Yes	No
Organization	No	Yes	Yes	Yes
__ORACO__Document_c	Yes	Yes	Yes	No
__ORACO__Expense_c	Yes	Yes	Yes	No
__ORACO__InventoryAuditDSD_c	No	Yes	Yes	No
__ORACO__InvAuditLineDSD_c	No	Yes	Yes	No
__ORACO__InventoryReloadDSD_c	No	Yes	Yes	No
__ORACO__InvReloadLineDSD_c	No	Yes	Yes	No
__ORACO__RouteAssignHist_c	No	Yes	Yes	No
__ORACO__RouteCheckInHist_c	No	Yes	Yes	No
__ORACO__PaymentDSD_c	Yes	Yes	Yes	Yes
__ORACO__PaymentLineDSD_c	Yes	Yes	Yes	
__ORACO__MerchLocation_c	Yes	Yes	Yes	Yes
__ORACO__ShipmentDSD_C	No	Yes	Yes	No

Object Name	onCreate	beforeSave	afterSave	onFieldValueChange
__ORACO__OrderDSD_c	No	Yes	Yes	Yes
__ORACO__OrderLineDSD_c	No	Yes	Yes	
__ORACO__RoutePresettlement_C	No	Yes	Yes	No
__ORACO__BankDeposit_c	Yes	Yes	Yes	Yes
__ORACO__AccountTaskDetails_C	No	Yes	Yes	Yes

The fields that support onFeildValueChange, are listed in this table:

Objects	Fields
__ORACO__BankDeposit_c	__ORACO__DepositDate_c
__ORACO__Inventory_c	__ORACO__MerchandisingLocation_Id_C
Activity	<ul style="list-style-type: none"> ActivityDescription PrimaryContactId __ORACO__StoreVisitType_Id_c
Account	<ul style="list-style-type: none"> PrimaryContactPartyId URL OwnerPartyId
__ORACO__OrderDSD_c	__ORACO__Comments_c

15 FAQs

Can I continue using the mobile or tablet application when the application is downloading data from the server ?

No. All actions are disabled temporarily when the application sync is in progress.

Do I have to check in to an appointment every time I create or edit notes in the mobile or tablet application?

No. You can create and edit notes without checking in to a route and appointment. Tap the Appointments tab on the landing page; select an appointment, and Tap Tasks. On the Tasks List page, select the Notes to create and edit notes.

How can I continue my store visit after I navigate away from the Appointment List page?

Go 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 must check into a route and appointment to edit photos and view the photo library.

Can I perform a store visit task while viewing the guided store visit tasks in the mobile or tablet application?

No. You must check 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 such as road accident, store closed, vehicle breakdown from the 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?

As sales representative, you must execute appropriate scheduled process for the route inventories and shipments display.

If you don't see your 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 aren't 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 mobile application, perform the following in consumer goods server after signing in as the sales administrator:

1. Create Distribution Center and assign a resource.

2. Associate an existing route to a distribution center or create a new route.
3. Allocate resource to the route associated with 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:
 - o Prepare Consumer Goods Route Download Document
 - o Generate Consumer Goods Shopping Cart Templates
 - o Prepare Consumer Goods Appointment Download Document

For more information about viewing activities in the application, refer to the Enabling Download of Activities topic.

