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- How can I continue my store visit after I navigate away from the Appointment List page?
- Can I edit photos for a store visit without checking into an appointment?
- Can I perform a store visit task while viewing the guided store visit tasks?
- Why aren't my route inventories and shipments being displayed?
- Why can't I view the activities?
Preface

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

Using Oracle Applications

Using Applications Help

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. Not all pages have help icons. You can also access Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.
- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

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

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

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

Audience and Scope

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

Related Guides

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

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

Related Topics

- Oracle Help Center
2 Overview

Oracle CX Retail Execution Mobile: Overview

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

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

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

Direct Store Delivery enables your sales team to deliver goods directly for your customers using Oracle CX Retail Execution Mobile. To use the Direct Store Delivery processes, you must integrate them with your back-end systems such as supply chain, accounting, or order management systems. When fully integrated, you can perform, track, measure, and manage your transactions at each stage of the delivery process, starting from checking your appointments to completing your visits, for better business results.

For more information on the direct store delivery flows available for integration in the Oracle CX Retail Execution Mobile Application, refer to the Integrating Retail Execution Mobile Direct-Store-Delivery (2298430.1) on My Oracle Support at https://support.oracle.com.

Related Topics

- Installing Oracle CX Retail Execution Mobile
- Prerequisite Tasks for Setting Up Oracle CX Retail Execution Mobile

Executing Merchandising Visits: Business Scenario

This topic takes an example of a typical day of a merchandising sales representative and aims to provide a step-by-step guide for executing 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 has to go to multiple retail stores and carry out various merchandising tasks assigned to her. The following figure depicts Lisa’s typical daily tasks.

Note: To perform multiple merchandising visits, Lisa repeats step 2 to 6 for each of her store visits before settling and closing the route.
A step-by-step example workflow for executing merchandising tasks:

1: Review 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 is not enabled, the administrator must download the route on Lisa’s device. In this case, when she signs in, she is 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 about downloading and starting your routes,
  See: Downloading Routes
  See: Working with Accounts
  See: Starting Your Route

- For more information about reviewing details of accounts associated with your routes,
  See: Working with Accounts

2: Prepare for the Store Visit

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. This helps her in preparing for her store visits.

- To understand how to review appointment information as well as create new or follow-up appointments,
  See: Viewing and Editing Appointments
See: Creating Appointments

3: Start Your Store Visit
Lisa has now reviewed all the information about the route and associated store visits. She arrives at the first store from 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 store visits and store visit tasks,
  See: Checking in to a Store Visit
  See: Selecting and Performing Store Visit Tasks

4: 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.

- To understand how to perform store inventory audit,
  See: Performing Inventory Audit
    - For more information about how to manage display locations, photos, and notes,
      See: Managing Display Locations
      See: Managing Notes
      See: Managing Photos
- For more information about conducting surveys,
  See: Performing Surveys

5: 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 also adds products to the shopping cart as per her conversations with the store manager. As per 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: Understanding Promotion Types and Presenting Promotions
  See: Adding Promotions to the Shopping Cart
- For more information about managing orders and shopping cart,
  See: Understanding Order Statuses
See: Creating Your Orders from the Shopping Cart

See: Updating and Canceling Orders

6: 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: Executing Direct Store Delivery Tasks

7: Mark the Route as Finished

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

- For more information about finishing the route,
  See: Closing the Route

Working in Offline or Disconnected Mode

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

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

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

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

Managing in-store activities
The sales representative can prepare for the day using the information available on the appointments and accounts pages. The device facilitates viewing of appointments visits with a guided tasks list without checking in to an appointment. The following in-store activities can be performed:

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

Managing supporting activities
Use the 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 to leverage your sales.
- **Store Binders**: Use store binders to view marketing content.

Related Topics
- Checking In to a Store Visit
- Selecting and Performing Store Visit Tasks
- How can I continue my store visit after I navigate away from the Appointment List page in the mobile or tablet application?

Exploring Demo Mode

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

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

Using Oracle Social Network

Use Oracle Social Network to facilitate real-time collaboration with the other sales representatives and leverage the networking tool. To use Oracle Social Network, tap Social from the Main menu. This launches the Oracle Social Network for you to collaborate.

▶ Note: Social is available only in the online mode.

Using Analytics and Dashboard

Use Analytics page to view related Business Intelligence (BI) reports for the retail account as a part of your store visit. You can access your favorite analytics reports and search the reports from the BI Catalog. As a sales representative, you can view the BI reports on the configurable home page to analyze their performance vis-a-vis the retail sales and promotions and take appropriate action from the Main menu.

Using 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 on Enabling Analytics, refer to the Oracle Sales Cloud Getting Started with Consumer Goods Implementation guide.

Using Dashboard

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

- **Sales vs. Target**: Shows a summary of closed opportunities compared with the quota for the current quarter.
- **Visits vs Target**: Shows the number of scheduled store visits compared with completed store visits and the related gap in the current quarter.
- **In-flight Promotions**: Shows the number of promotions and the total order amount originated from promotions in the current quarter.
- **Sales Trend**: Shows the total number of orders and the total order amount for the current quarter.
- **Accounts**: Shows the number of managed accounts and the accounts that have met per-account sales targets for the current month.
- **Eligible Promotions**: Shows the number of active promotions in a quarter.
Related Topics

- Configuring Analytics and Oracle Social Network
- Configuring Analytics Tabs
# 3 Setting Up Oracle CX Retail Execution Mobile

## Prerequisite Tasks

This topic covers tasks that you must perform in consumer goods web application to enable features Oracle CX Retail Execution Mobile.

> **Note:** You must perform the steps provided in this guide after completing the steps mentioned in Getting Started with Consumer Goods Implementation guide.

<table>
<thead>
<tr>
<th>Task</th>
<th>Mandatory</th>
<th>Further Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create job roles for Route Download Administrator and Inventory Reporter.</td>
<td>Yes</td>
<td>Creating Job Roles</td>
</tr>
<tr>
<td>Understand and setup route auto-download.</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
  - Setting Up Route Auto-download and Auto-accept: Points to Consider  
  - Configuring Profile Options |
| Configure consumer goods web application to enable download of activities on the mobile application. | Yes | Configuring the Web Application to Enable Download of Activities |
| Configure the profile options related to  
  - Setting up Oracle Policy Automation (OPA) hub for enabling download of surveys  
  - Configuring BI dashboard infolet path to enable infolets on the dashboard page  
  - Enabling route auto-download  
  - Setting up the privacy policy for your company  
  - Enabling access to tablet composer  
  - Configuring store credit list price | No | Configuring Profile Options |
| Perform required configurations for BI Dashboard Reports. | No | Setting Up BI Dashboard Reports |
| Ensure that Price Book privilege is added to the sales representative role that is used. | Yes | Setting Up Data Security Policies in Getting Started with Consumer Goods Implementation guide |
| Ensure that the price book includes price for the products in the product assortment, to enable sales representative to add products to the shipping cart. | Yes | Managing Price Books and Taxation in Using Sales for Consumer Goods guide |
Table of Contents

1. Setting Up Oracle CX Retail Execution Mobile
2. Related Topics

Setting Up Oracle CX Retail Execution Mobile

<table>
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<th>Task</th>
<th>Mandatory</th>
<th>Further Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>To support shopping cart and sales order features, ensure that the account must be assigned with an assortment plan.</td>
<td>Yes</td>
<td>Managing Product Assortments in Using Sales for Consumer Goods guide.</td>
</tr>
<tr>
<td>Ensure that the sales representative is the primary resource of the route if route auto-download is activated.</td>
<td>Yes</td>
<td>Managing Distribution Centers and Routes in Using Sales for Consumer Goods guide.</td>
</tr>
<tr>
<td>Ensure that related container classes, assortment line relationships, and relevant account associations have been configured on the web application.</td>
<td>Yes</td>
<td>Working with Returnable Containers in Using Sales for Consumer Goods guide.</td>
</tr>
<tr>
<td>Enable Oracle Social Network.</td>
<td>No</td>
<td>Configuring Analytics and Oracle Social Network</td>
</tr>
<tr>
<td>Enable Analytics page and configure Analytics tabs</td>
<td>No</td>
<td>• Configuring Analytics and Oracle Social Network</td>
</tr>
<tr>
<td>• Configuring Analytics Tabs</td>
<td></td>
<td>• Configuring Analytics Tabs</td>
</tr>
</tbody>
</table>

\- Note: Ensure that you have configured required surveys in the OPA hub.

If you are using the Direct Store Delivery feature, refer to the Integrating Retail Execution Mobile Direct Store Delivery guide. This guide describes how the integrated applications work with the Oracle CX Retail Execution Mobile and the configurations that you must do to support the integrated business processes.

Related Topics

• Integrating Retail Execution Mobile Direct-Store-Delivery

Creating Job Roles

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

• 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. Sign in as the sales administrator.
3. On the Role tab, search and drill down on the sales administrator role.
   The role code is ORA_ZBS_SALES_ADMINISTRATOR_JOB.
4. Select Role Copy. In the Copy Options dialog box, select Copy Top Role and Inherited Roles.
5. Use the information in the following table to copy each of the roles:
Role Name                  | Role Code                          |
---                        |-----------------------------------|
Route Download Administrator| ZEM_ALLOW_PRIVILEGED_ACCESS        |
Inventory Reporter         | ZEM_ALLOW_INVREPORT_ACCESS         |

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

### Configuring BI Dashboard Reports

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

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

To configure the BI dashboard reports:

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

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Tile View</th>
<th>Detail View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Vs Target</td>
<td>Tile_SalesVsTarget</td>
<td>Detail_SalesVsTarget</td>
</tr>
<tr>
<td>Visit History</td>
<td>Tile_VisitHistory</td>
<td>Detail_VisitHistory</td>
</tr>
<tr>
<td>Eligible Promotions</td>
<td>Tile_EligiblePromotions</td>
<td>Detail_EligiblePromotions</td>
</tr>
<tr>
<td>Sales Trend</td>
<td>Tile_SalesTrend</td>
<td>Detail_ESalesTrend</td>
</tr>
</tbody>
</table>

> **Note:** Follow the naming convention for the report names. Tile reports must be in the format `Tile_<ReportName>`. Detail Reports must be in the format `Detail_<ReportName>`.

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

Oracle Sales Cloud
Using Retail Execution Mobile

Chapter 3
Setting Up Oracle CX Retail Execution Mobile
After you create the folder, set the profile option value for the folder as /shared/Custom/RetailExecutionDashboard. For more information on setting the profile option values for the BI Reports file path, refer to the Configuring Profile Options section in the Getting Started with Consumer Goods Implementation guide.

**Related Topics**
- Configuring Profile Options in Consumer Goods

## Configuring Analytics and Oracle Social Network

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

To enable Oracle Social Network:

1. Sign in as the sales administrator.
2. Navigate to Manage Sandboxes and create a sandbox. Navigate to Application Composer.
3. Select **Sales** application. Click **Common Setup > Mobile Application Setup**.
4. Tap **Oracle Sales Cloud Retail Execution**. This renders the 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 sales representative can use Oracle Social Network and Analytics.

## Configuring Analytics Tabs

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

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

<table>
<thead>
<tr>
<th>Functional Name</th>
<th>Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td>Activity</td>
</tr>
<tr>
<td>Accounts</td>
<td>Account</td>
</tr>
<tr>
<td>Promotions</td>
<td>__ ORACO__ Promotion</td>
</tr>
<tr>
<td>Routes</td>
<td>__ORACO__Route</td>
</tr>
<tr>
<td>Assortment Lines</td>
<td>__ ORACO__ ProdAssortmentLine</td>
</tr>
</tbody>
</table>
To configure analytics tab for objects,

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

Configuring Profile Options

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

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

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

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

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Display Name</th>
<th>Profile Values and Description</th>
<th>Application and Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>_ _ ORACO_ _ MOBILE_ OPA_HUB_URL</td>
<td>MOBILE_ OPA_HUB_URL</td>
<td><a href="https://%3Cyour-environment%3E/opa-hub">Site:</a> This enables download of surveys from Oracle Policy Automation hub.</td>
<td>Application: Sales Module: Activity</td>
</tr>
<tr>
<td>_ _ ORACO_ _ MOBILE_ DASHBOARD_INFOLET_PATH</td>
<td>MOBILE_ DASHBOARD_INFOLET_PATH</td>
<td><a href="/shared/Custom/RetailExecutionDashboard">Site:/shared/Custom/RetailExecutionDashboard</a> This enables Business Intelligence reports for the sales representative to view their performance dashboard.</td>
<td>Application: Sales Module: Activity</td>
</tr>
<tr>
<td>_ _ ORACO_ _ ROUTE_ AUTODOWNLOAD</td>
<td>Automatic Route Download</td>
<td><a href="FALSE">Site: FALSE</a></td>
<td>Application: Sales Module: Sales</td>
</tr>
<tr>
<td>Profile Option Code</td>
<td>Profile Display Name</td>
<td>Profile Values and Description</td>
<td>Application and Module</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>_ _ ORACO_ _ PRIVACY_ POLICY</td>
<td>Privacy Policy</td>
<td>You must disable automatic route download so that the routes can be manually downloaded by the sales administrator.</td>
<td>Application: Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Set the <strong>Profile Value</strong> to <strong>TRUE</strong> if you want to enable automatic download of routes.</td>
<td>Module: Activity</td>
</tr>
<tr>
<td>ACO_DISABLE.CG_TABLET_ACCESS</td>
<td>Tablet Composer Access</td>
<td>Site: set the value as required by your business to enable display of company privacy policy. Ensure that the value you enter is within a thousand characters.</td>
<td>Application: Mobile Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use this profile option to enable or disable access to tablet composer. If this profile option doesn’t exist or is set to <strong>Y</strong>, the tablet artifacts will not be generated. If user accesses the application from a tablet device, only mobile view is shown unless the profile option is set to N.</td>
<td>Module: Mobile Sales</td>
</tr>
</tbody>
</table>
| _ _ ORACO_ _ CREDIT_ LISTPRICE | Store Credit List Price    | Initial value is set to **Site: Y**  
  - **Y**: Immediate. Use this option if the store credits allocated to an account must be immediately available in the mobile application for redemption when a product is returned. When you use this option, the mobile application aggregates the transactions to create a local copy of the store credits. The ERP application does not validate the transactions.  
  - **N**: Back Office. Use this option if the store credits allotted to an account must be prevented from being redeemed immediately using the mobile when a product is returned. When you use this option, the ERP application validates the | Application: Sales      |
|                     |                             | Module: Sales                                                             |                        |
## Tip:
- If the profile option is created but the profile option values for the specific user and the site level profile option is not added for the user in the Manage Profile Option section. If so, the route auto-download will automatically be enabled.
- If the profile option itself is not created in the application for all the users, then also the route auto-download is enabled.

**Note:** When route auto-download is enabled, route is automatically accepted after download. If you disable route auto-download, then you must ensure that the appointments are created by sales administrator only and the sales administrator is added as a resource for the appointment.

### Configuring Profile Options: Procedure

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

1. Sign in using Administrator role.
2. Navigate to Setup and Maintenance and go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Profile Options
3. On the Manage Profile Options page, click the **New** icon in the **Profile Options** section.

---

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Profile Display Name</th>
<th>Profile Values and Description</th>
<th>Application and Module</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORACO</strong> EXPRESS_DELIVERY</td>
<td>EXPRESS_DELIVERY</td>
<td>Site: Y to enable express delivery mode.</td>
<td>Application: Sales for Consumer Goods Retail Execution</td>
</tr>
<tr>
<td><strong>ORACO</strong> ENABLE_REP_FULL_ACCESS_ON_ROUTE_INVENTORY</td>
<td>Read Only Route Inventory Access for Sales Representative</td>
<td>Site: Yes Enables sales representative to have full access to the route inventory when set to Yes.</td>
<td>Module: Sales for Consumer Goods Retail Execution</td>
</tr>
<tr>
<td><strong>ORACO</strong> SYNC BEFORE START ROUTE</td>
<td>Sync Before Start Route</td>
<td>Site: Yes Sales representative must upload the changes on the Pending Sync page when this is set to Yes.</td>
<td></td>
</tr>
</tbody>
</table>

**Oracle Express Delivery**

Site: Y to enable express delivery mode.

**Oracle Enable Rep Full Access on Route Inventory**

Read Only Route Inventory Access for Sales Representative

Site: Yes Enables sales representative to have full access to the route inventory when set to Yes.

**Oracle Sync Before Start Route**

Sync Before Start Route Site: Yes Sales representative must upload the changes on the Pending Sync page when this is set to Yes.
4. On the Create page, provide the details as listed in the table. Set Current date as the **Start Date**.
5. Click **Save and Close**.
6. At the **Profile Option Levels**, set Site to **Enabled** and **Updatable**.
7. Click **Save and Close**.
8. Back on the Setup and Maintenance page, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
10. Create a new value for the **Profile Option** in the **Profile Values** section.
11. Select **Site** and set the **Profile Value** as listed in the table.
12. Click **Save and Close**.

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

This topic explains the steps to view the activities created in the consumer goods web application in the Oracle CX Retail Execution Mobile.

To view the activities on the mobile application, you must perform the following set of steps in the given sequence on the Consumer Goods Web application.

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

**Setting Up Distribution Center and Routes**

The following steps must be performed in the Consumer Goods Web application. For more information on performing the given steps, refer to the Managing Distribution Centers and Routes in the Using Sales for Consumer Goods guide.

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

Once you have completed required configuration on the Consumer Goods Web Application, you must ensure that route is downloaded and accepted on the Oracle CX Retail Execution Mobile.

- If route auto-download is enabled, then the route is automatically downloaded and accepted on the mobile application. See Setting Up Route Auto-download and Auto-accept: Points to Consider
- If route auto-download is disabled, then route must be downloaded and accepted. See Downloading Routes in Using Retail Execution Mobile guide.

**Creating Appointments**

During appointment creation on the Consumer Goods Web Application, the sales administrator must enter values for the following fields to view the activities in the mobile application. First, navigate to **Activities - Create Appointment** and enter
the values for the following fields: For more information on creating appointments, refer to the Managing Appointments section in the Using Sales for Consumer Goods guide.

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

Running ESS Jobs
The following ESS jobs must be run in the Consumer Goods Web application:

- Prepare Consumer Goods Route Download Document
- Generate Consumer Goods Shopping Cart Templates
- Prepare Consumer Goods Appointment Download Document

For more information on scheduling ESS jobs, refer to the Setting Up Enterprise Service Scheduler Jobs chapter in the Getting Started with Consumer Goods Implementation guide.

Related Topics
- Managing Appointments Using Consumer Goods Web Application

Setting Up Surveys Using Oracle Policy Automation
You must ensure that your surveys are appropriately configured in Oracle Policy Automation so that sales representatives can perform surveys during their store visits.

The following prerequisites must be met before you begin working with surveys:

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


2. Use the Oracle Policy Automation command line administration tool to deploy the policy model to the Oracle Policy Automation hub, as this cannot be done from Oracle Policy Modeler.
For more information about the Oracle Policy Automation command line administration tool, see http://

3. Create a record of the survey using the same name used during the creation in Oracle Policy Automation and
associate the survey with the account.

For more information see Managing Surveys in the Using Sales for Consumer Goods guide.
4 Getting Started

Installing the Application

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

Software Requirements

Supported Operating System versions:

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

Note: Your mobile device 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

Installing the Application

To install the application:

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

To find your Host name:

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

Related Topics

- Prerequisite Tasks for Setting Up Oracle CX Retail Execution Mobile
- Configuring Profile Options

Signing In

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

Tip: You can view the Oracle CX Retail Execution Mobile 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.

Understanding Application Settings

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

The available settings parameters for the application are:

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

Related Topics

- Data Availability and Capacity in the Offline Mode: Explained

Performing Synchronization

Sync and refresh the cached data on the mobile application with the server. The application automatically synchronizes your device with the server upon first sign-in. You can also perform synchronization whenever needed to sync the changes.
Managing 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. Do one of the following as required:
   - Tap **Upload**, to sync offline transactions to the server.
   - Tap **Sync**, to upload pending transactions to the server and download data from the server.
   - Tap **Export All**, to open the local email client and attach a .csv file with the offline transactions in the pending queue.

Troubleshooting Synchronization

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

Downloading Routes

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

Note:
- For the sales administrator to download routes manually, the profile option for `ROUTE_AUTO_DOWNLOAD` must be set to False. If the auto download option is set to True, the routes will be auto downloaded to the device.
- The sales administrator must have the `ZEM_ALLOW_PRIVILEGED_ACCESS` privilege to download routes.
- If you disable route auto-download, then you must 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 is not enabled, you must perform the following steps to download routes to the device:

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

Related Topics
- Configuring Profile Options

Starting Your Route

You must accept and start a route to check in to an appointment and start your store visit.

To start the route that is assigned to you:

1. Sign in as the sales representative.
2. On the Summary tab of the Calendar page, review the summary information about the downloaded route.
3. 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, then the route is automatically accepted.

4. Tap Start to begin the route.
   Your current date, time, and geo-location are captured in the application when the route starts.

   Note: If your route has been assigned with a category, then you will only see products and promotions belonging to that category.
Related Topics

- Configuring Profile Options Using Web Application
- Settling Routes Using Web Application
6 Managing Accounts and Appointments

Working with Accounts

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

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

To view and update your account details:

1. Sign in as a sales representative and start the route assigned to you.
2. 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:

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

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

Managing Account's Contacts

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

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

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

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.
Viewing and Editing Appointments

This topic explains how to leverage the information about the calendar page to plan your day effectively.

Once you start the route, you are directed to the Appointments tab of the Calendar page, where you can view the list of appointments associated with the route assigned to you, on the Appointments tab. Tap any appointment card to expand it and 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:

- 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 pick 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 consumer goods web application, to view the store visit tasks on the mobile or tablet device.
Creating Appointments

As the sales representative, you can create new 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, you are directed to the Calendar page, where you can view the list of appointments associated with the route, on the Appointments tab.

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

To create an appointment:

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

The following values are set automatically when you create a new appointment:
   - Owner is set to logged in user.
   - Store Visit is set to Y and can only be changed from the web application.
   - Visit Status is set to Not Started.

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

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

There are two ways to create a follow-up appointment 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.

Related Topics

- How can I continue my store visit after I navigate away from the Appointment List page in the mobile or tablet application?
- Why can’t I view the activities?
Performing Store Visits

Checking In to a Store Visit

After signing in, you can review your appointments for the day on the Appointments tab. Use pick list to view if you need to deliver any items to the store. You can also get directions to the store by using location option on the appointment card.

To check in to an appointment:

1. Sign in as a sales representative.
2. Tap **Start** on the Appointments tab.
3. After checking into a route, on the Appointments tab, tap an appointment card to expand it.
4. Tap **Check In**.
   - This logs the time and your geo-coordinates.
5. You can now select the in-store activities to perform on the Tasks tab.

If for some reason, you cannot provide the service to the store, select appropriate reason for the same 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**.

Related Topics
- Viewing and Editing Appointments in Oracle CX Retail Execution Mobile

Selecting and Performing Store Visit Tasks

Once you check into the appointment, you can view the store visit tasks assigned to you on the Tasks tab. When you tap any task, the application navigates you to the tasks page and the selected task on the tasks bar is highlighted.

The followings are the standard store visit tasks available in the application:

- Order Capture
- Inventory Audit
- Survey
- Promotion Presentation
- Promotion Compliance Audit
- Order Delivery

Tasks that are marked with * are mandatory and must be performed 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 are 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 have not completed 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.

Related Topics
- Delivering Shipments in Oracle CX Retail Execution Mobile
- Performing Surveys in Oracle Customer Experience Retail Execution Mobile
- Performing Inventory Audits
- Activating Layouts for Objects
- Configuring Profile Options in Web Application

Managing Notes

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

To create, edit, or delete notes:

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

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

Managing Photos

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

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

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

**Related Topics**

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

### Managing Display Locations

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

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

To view or edit available display locations:

1. Sign in as a sales representative.
2. Check In to an appointment.
3. Tap the **Display Locations** tab.

   You can view the list of all the available display locations for the store on this page.

4. Tap a display location to view the details 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**

- Performing Inventory Audits
Performing Inventory Audits

Performing Inventory Audit

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

To perform an inventory audit:

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

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

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

Performing Surveys

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

Signing in to Oracle Policy Automation Hub

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

To sign in to the Oracle Policy Automation hub:

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

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

Performing Account Surveys

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

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

Performing Promotion Compliance Audit Surveys

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

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

To carry out a promotion compliance audit:

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

   The lists of promotion compliance audit surveys for an account are displayed.
6. Tap a survey to drill down and view its details.
7. Fill your responses for the survey and click **Save and Close**.
8. 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**

- Setting Up Surveys Using Oracle Policy Automation
10 Managing Product Assortments

Viewing Product Assortments

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

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

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

1. Sign as the sales representative.
2. On the Landing page, tap Accept route and then Start route.
3. After checking into a route, tap the Appointments subtab on the Landing page.
5. View the list of products in the assortment and their attributes such as SKU, UOM, recommended facing, delist date, and so on.

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

Related Topics

- Managing Priority Products in Web Application
11 Working with Shopping Cart and Orders

Understanding Order Statuses

This topic explains meaning of different statuses that an order can have after you create it.

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

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

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

Creating Your Orders from the Shopping Cart

This topic explains how to create your orders during your store visit using the shopping cart.

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

**Note:** If your route has been assigned with a category, then you will only see products and promotions belonging to that category.

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

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

1. Sign in as the sales representative.
2. On the Appointments tab of the Calendar page, expand the appointment card and tap Check In.

3. On the Tasks tab, tap the Shopping Cart icon.

   The shopping cart initially contains products and quantities from the shopping cart template, if a template has been configured and associated to the account.

4. Select and add the products to the shopping cart as required.

5. Update the product quantities as required.

6. To add products from any specific priority groups:
   a. Tap Priority Groups.
   b. Select the priority group to add all the products in that group. Alternatively, you can also drill down into a group and select limited number of products from the group.

7. To add promotions,
   a. Tap Promotions from the Actions menu.

   ![Note: The Actions menu is not 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 as required and tap Add All to Cart.
   d. Tap Back icon twice to return to the Shopping Cart page.

8. Once the shopping cart is updated, click Submit to create an order.

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

Related Topics

- Managing Priority Products in Web Application
- Working with Shopping Cart Templates

## Updating and Canceling Orders

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

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

### Updating Orders

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

1. Sign in as a sales representative.
2. On the Landing page, tap **Accept** route and then **Start** route.

3. After checking into a route, tap the Appointments tab on the Landing page.

4. Tap **Check In** and navigate to the Orders tab from the Tasks List page.

5. Filter and view your order list by **Orders pending delivery** or **Recent Orders**.

6. Tap any order row and then tap the Summary tab to view the Order Details page.

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

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

### Returning Products and Containers

Use this topic to understand how to return products and containers.

#### Returning Products

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

To return products:

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

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

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

#### Returning 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 are added.
4. Tap **Order**.

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

Understanding Promotion Types and Presenting Promotions

This topic explains different trade promotions types and how to present them to increase your product sales.

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

- **Fixed Discount**: A fixed monetary amount or percentage applied to participating products.
- **Fixed Combination**: Groups of SKUs bundled and sold together and cannot be altered by the sales representative. The only information the sales representative provides is the number of fixed combos a customer is purchasing.
- **Dynamic Combination**: Groups of SKUs bundled together and have some fixed items and some variable items that the sales representative can select at the time of the sale. Dynamic combination promotion is categorized into dynamic combination and rebate discount. Rebate discount gives benefit to customers who meet the objective of a determined number of items bought.
- **Volume Discount**: 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 promotions, the promotions marked as mandatory are automatically added to the shopping cart on tapping check-in.

Informational content about promotions can be added as store binders to the account using consumer goods web application. These store binders are used for promotion presentations. 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 drill down to a specific promotion to present that promotion to the store manager during your visit.

Adding Promotions to the Shopping Cart

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

> **Note**: If your route has been assigned with a category, then you will only see promotions belonging to that 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:
   - Fixed discount
   - Fixed Combination
   - Dynamic Combination
   - 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 Managing Shopping Carts and Creating Orders for more information.

**Related Topics**

- Creating Your Orders from the Shopping Cart
13 Executing Direct Store Delivery Tasks

Delivering Shipments

You perform order delivery as part of your store visit tasks. After you submit an order, the order is processed by ERP and product shipments are created to deliver the orders. 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. Sign in as the sales representative.
2. On the Landing page, tap Accept followed by Start to perform route check in.
3. After checking into a route, tap the Appointments tab on the Landing page.
4. Tap Check In on the Appointments tab of the Calendar page.
5. On the Tasks List page, tap Order Delivery from the list of store visit tasks.
6. View the list of shipments generated from the order to be delivered to the store and tap a shipment to drill down into its details to confirm with the store manager.
7. Tap Deliver.
8. Verify the items of the shipments with the store manager and collect the store manager's signature for the delivery invoice.
9. Tap Submit to submit the delivery.

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

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

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

Managing 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, at any point you can go back to reviewing and printing your order invoice to enable collection of payment by navigating to the Invoices tab on the Check In page.
Managing Payments

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

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 and so on.

   If one of the credit line for the account has a balance due, you will see the notification for the same in the beginning of the page.

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

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

4. Tap **Accept** after you are 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 are done to save your changes.

**Related Topics**

- Configuring Profile Options

Delivering Shipments Using Express Delivery Mode

This topic explains how to use express delivery mode to deliver your shipments faster to reduce your overall store visit duration.

When the express delivery mode is enabled, 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.
This enables you to stay on the Order Delivery page throughout your shipment delivery process so that you can complete all the product deliveries, returns, and payments at once.

**Note:** Express delivery mode is only available for mobile devices. You must set the profile option `__ORACO_EXPR DELIVERY__` to `Y` to enable express delivery of shipments. For more details, see Configuring Profile Options.

### Delivering Shipments

To deliver multiple shipments when express delivery is enabled:

1. Sign in as a sales representative and start the route assigned to you.
2. On the Appointments tab of the Calendar page, expand your appointment and tap **Check In** to start your store visit.
3. 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.
4. 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, then you will only see products belonging to that category.
   c. Tap **Returns** to return products and containers. For more information, see Returning Products and Containers section in this topic.
5. Tap **Deliver**. At this point,
   
   o If you have exceeded maximum allowable containers limit for the account, you are promoted with a warning message along with options to 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** to pay for the additional containers, shipments are delivered and Payment page appears where you can capture payments for all the shipments as well as 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.
6. 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.

### Returning 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.

Canceling Shipments
You can cancel the delivery of all the shipments at the same time by tapping Cancel Shipment option from the Actions menu on the Order Delivery page. Once you cancel the shipment, you cannot make any updates to them.

You can activate the canceled shipments by tapping Activate Shipments from Actions menu. The shipments can now be updated and delivered.

Related Topics
- Configuring Profile Options in Consumer Goods

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

Viewing Credit Lines
To view the details of the credit lines and associated payments:

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

Alternatively, you can tap the Credit Lines subtab on the Tasks List page as well.
6. Select a credit line to view the details on the Credit Lines Details page such as credit line number, account, and amount used, list of legal entities for the credit line and so on.

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

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

Paying for Credit Lines
To pay toward a credit line and credit note:

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

---

**Creating and Delivering Ad Hoc Orders**

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

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

To deliver ad-hoc orders,

1. Create an order.
   
   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 can also be related to a container. If the number of loaned containers for the selected products exceeds the maximum allowed limit, you must return the containers or pay for the additional ones. You can return the containers from Containers subtab. If you choose to pay for the additional containers, they are added to the invoice that is generated.

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

**Related Topics**

- Creating Your Orders from the Shopping Cart
14 Managing Route Inventory and Inventory Reload

Managing My Inventory

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

The sales administrator can use My Inventory to:

- Manage route inventory details
- Manage inventory reload details

Types of Inventories

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

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

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

Managing Route Inventory

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

To view and edit My Inventory:

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

To view distribution center details:

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

This displays distribution center details like distribution center name, territory manager and sales representative assigned and so on.
To sign and print route inventory:

1. On the Inventory List page, tap **Sign and Print** from the Actions menu.
2. Administer your signature and enter the signed date.
3. Tap **Print** to generate a .pdf file for the route inventory report on your mobile device. Use the print functionality provided by your PDF Viewer to print the document.

Managing Inventory Reload

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

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

To view and edit your inventory reload report,

1. Sign in as the sales administrator.
2. From the 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 and select
2. Administer your signature and enter the signed date
3. Tap **Print** to generate a .pdf file for the route reload report on your mobile device. Use the print functionality provided by your PDF Viewer to print the document.

**Related Topics**

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

Transferring Route Inventory

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

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

To exchange route inventory,

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

   The list page contains names of sales representatives, along with their route names
5. Tap the user image of the sales representative.

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

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

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

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

Verifying and Submitting Route Inventory Transactions

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

Route settlement includes,

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

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

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

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

   ✍ Note: You must have ZEM_ALLOW_INVREPORT_ACCESS granted to your job role to perform this task.

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

Repeat above steps to verify and submit the route inventory reload transactions as well.

Closing the Route

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

Upon arrival to the distribution center at the end of the day the sales representative starts the settlement process. The sales representative 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 you have checked out of all the appointments associated with the route, Tap Finish to finish of the route on Summary tab of the Calendar page.

   This captures your current date, time, and geo-location.
Note: If you have not provided services to a store, select a valid not serviced reason for the corresponding appointment when 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 so on.
   - Expenses incurred on the route by sales representative.
   - Payment overage or shortage.

Note: You can adjust the balance by recording cash, expenses, or shortage amount. The balance must be zero to close the route.

4. Tap **Actions** menu 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 sales representative in the route.

5. After you have reviewed the route settlement details, select **Print** to generate a .pdf file for the route settlement report on your mobile device. You can print the route settlement report any time after closing the route.

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

Related Topics

- **Settling Routes Using Web Application**
16 Extending Oracle CX Retail Execution Mobile

Extending Oracle Customer Experience Retail Execution Mobile

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

To extend the Retail Execution mobile application:

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

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

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

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

Note: Not applicable in the table refers to features that are not applicable to the object. No refers to features that are not yet implemented in the application.
<table>
<thead>
<tr>
<th>Object Display Name</th>
<th>Object API Name</th>
<th>Configure Fields</th>
<th>Configure Child Objects</th>
<th>Show or Hide Actions</th>
<th>Dynamic Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route</td>
<td><strong>ORACO</strong>/Route_c</td>
<td>Limited to detail view</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Note: Do not show/hide any buttons for this object.</td>
</tr>
<tr>
<td>Product Assortment</td>
<td><strong>ORACO</strong>/ProductAssortment_c</td>
<td>Applicable to list and detail view</td>
<td>Yes</td>
<td>Not applicable</td>
<td>Yes</td>
</tr>
<tr>
<td>Cart</td>
<td><strong>ORACO</strong>/ShoppingCartDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Promotion Products</td>
<td><strong>ORACO</strong>/PromotionProductCollection_c</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Cart Items</td>
<td><strong>ORACO</strong>/ShoppingCartItemCollection_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Order</td>
<td><strong>ORACO</strong>/OrderDSD_c</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Order Items</td>
<td><strong>ORACO</strong>/OrderLineDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Shipment</td>
<td><strong>ORACO</strong>/ShipmentDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Shipment Lines</td>
<td><strong>ORACO</strong>/ShipmentLineDSD_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Route Inventory</td>
<td><strong>ORACO</strong>/RouteInventory_c</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Account Credit</td>
<td><strong>ORACO</strong>/CreditLineDSD_c</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Payment</td>
<td><strong>ORACO</strong>/PaymentDSD_c</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
For additional steps on extending the order object, refer to the Performing Implementation Tasks in the Oracle Getting Started with Consumer Goods Implementation guide.

Configurations After Adding Custom Fields to Objects

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

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

<table>
<thead>
<tr>
<th>Object Display Name</th>
<th>Object API Name</th>
<th>Enable Force Inclusion in Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment</td>
<td>__ ORACO__PaymentDSD_c</td>
<td>No</td>
</tr>
<tr>
<td>Account Credit</td>
<td>__ ORACO__CreditLineDSD_c</td>
<td>Yes</td>
</tr>
<tr>
<td>Order</td>
<td>__ ORACO__OrderDSD_c</td>
<td>Yes</td>
</tr>
</tbody>
</table>

To enable force inclusion in object download,

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

**Related Topics**

- Extending Sales
Associating Custom Tasks with Custom Objects

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

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

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

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

2. Create a sandbox.
3. In Application Composer, select **Sales** from the **Applications** list.
4. Click **Common Setup > Mobile Application Setup**.
5. In the Oracle Customer Experience Cloud Mobile Applications page, click **Oracle Sales Cloud Retail Execution**.
6. Select your custom object from the **Available Features** pane and 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 you used to make the configurations, 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.
17 FAQs

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

No. All actions are disabled temporarily when the application is performing synchronization.

Do I have to check in to an appointment every time I want to create or edit notes?

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

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

Navigate to the Appointments List page and tap Resume Visit to continue your store visit.

Can I edit photos for a store visit without checking into an appointment?

No. You have to check into a route followed by an appointment check-in to edit photos and view the photo library.

Can I perform a store visit task while viewing the guided store visit tasks?

No. You must be checked into a task, followed by an appointment check-in to perform the store visit tasks and other related activities.
Note: Specify the reason for not completing a store visit by selecting from options such as road accident, store closed, vehicle breakdown by navigating to a specific incomplete store visit. On selection of a reason, the visit status gets set to Not Visited.

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

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

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

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

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

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

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

Why can't I view the activities?

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

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

For more information on viewing activities on the Oracle CX Retail Execution Mobile application, refer to the Enabling Download of Activities.
Related Topics

- Configuring the Web Application to Enable Download of Activities for Oracle Customer Experience Retail Execution Mobile