

# Oracle® Sales for Handhelds

User Guide

Release 11i

Part No. B15971-01

July 2005

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## Overview of Oracle Sales for Handhelds

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

## Key Features

Oracle Sales for Handhelds has the following key features:

- The application uses the HTML browser available on the handheld device to provide real-time access to enterprise information.
- Users can leverage familiar native Personal Information Management (PIM) applications available on handheld devices to manage appointments, contacts, and tasks.
- The application provides contextual hyperlinks within the note section of appointments and contacts that provides a conduit to real-time enterprise information.
- Outlook integration

## Browser Based Application

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

The supported browsers are:

- Pocket PC handheld devices running Pocket IE on Windows Mobile 2003
- Palm based handheld devices running Blazer 3.0 browser or higher
- Nokia running Internet Browser for HTML 4.01/xHTML on Symbian 7.OS operating system

## Accessing Oracle Sales Via Connected Handheld Browser

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

You need the Wireless Sales User responsibility

### Steps:

1. Open the web browser on your handheld device.
2. Go to the URL for Applications login for your environment.

3. Enter your username and password. You are taken directly to Oracle Sales for Handhelds.

## **Customer Management Features**

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

- Search customers
- View, update, and create information related to the customer
- Create and update information associated with customers such as notes and tasks.

## **Contact Management Features**

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

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

## **Opportunity Management Features**

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

- View opportunities and opportunity related information associated with customers and contacts
- Add and update products
- Create and update information associated with opportunities, such as notes, tasks, and appointments

## **Appointment Wrap-Up**

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

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

## **Appointments and Task Management**

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

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

## Oracle Sales Synchronization

Users can use Oracle Sales synchronization to synchronize information between laptop, desktop, or Pocket PC devices and the eBusiness Suite. Oracle Sales Synchronization can be used to synchronize:

- Appointments
- Tasks
- Contacts

Synchronization functionality is provided specifically for:

- Pocket PC devices running Windows Mobile 2003
- Laptops or desktops with Windows 2000 or Windows XP clients running Outlook 2000, Outlook 2002 (XP), Outlook 2003

## Downloading and Installing the Pocket PC Synchronization Client

To use the synchronization with Oracle Sales you need to install the client on your Pocket PC.

### Prerequisites

- You need the Wireless Sales User responsibility

#### Steps:

1. Open Internet Explorer on your handheld device.
2. Go to the URL for Applications login for your environment.
3. Enter your username and password. You are taken directly to Oracle Sales.
4. Select Pocket Outlook Client Download from the menu.
5. Click the link for Step 1 in the browser page.
6. In the Download window, deselect Open File After Download. Download the file.
7. In the browser page, select the link in Step 2.
8. In the Download window, leave Open File After Download selected. Download the file.

The client loads and installs automatically in your Pocket PC.

## Downloading and Installing the Desktop Outlook Synchronization Client

Download the client to be able to synchronize appointments, tasks, and contacts between Microsoft Outlook on your desktop and Oracle Sales.

#### To initialize custom category:

If you have your own custom category added to the Master Category List, then proceed with the installation steps. If you don't have your own custom category added to the Master Category List, then you need to create one and remove it using the following steps.

1. In Outlook select Edit > Categories from the menu .
2. Click **Master Category List**.
3. Add a new Category called Outlook Category.

4. Click **OK**.
5. Click **Master Category List**.
6. Select Outlook Category from the list.
7. Click **Delete**.
8. Click **OK**.

#### **Installation Steps:**

1. Login to Oracle Applications and select your Sales User responsibility.
2. On the Dashboard, go to Preferences > Outlook Synchronization > Client Download.
3. Follow the instructions on the page.

Your Outlook toolbar includes "Oracle Sales Synchronization" which launches the synchronization program.

If you see a security permission message while synchronizing, answer Yes to continue the synchronization.

## **Overview of Business User Flows**

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

## **Contacts in Outlook or Pocket PC**

#### **Scenario:**

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

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

6. Jerry synchronizes. During synchronization, new contacts are sent to Oracle Trading Community Architecture and checked for duplicates using Data Quality

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

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

## Restrictions

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

## Related Topics

*Oracle Trading Community Architecture User Guide*

## Appointments in Outlook or Pocket PC

### Scenario:

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

**Note:** This is the only category that should be assigned to the appointment for the appointment details to display in the Oracle Sales Calendar. If a different category is used, then the appointment displays as a Time Booking in the Oracle Sales Calendar after synchronization.

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

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

## Restrictions

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

Appointments can repeat up to 99 weeks on the client.

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

## Tasks in Outlook or Pocket PC

### Scenario:

1. Jerry Weinberg's manager assigns a task to both Jerry and to John Smith to write a report about their visit to Business World. The task is created using Oracle Sales and is associated to the contact at Business World and assigned to John and Jerry.
2. Jerry and John both synchronize their Pocket PCs in the morning and see their task. Both update the status of the task and add to the description using their remote devices. John synchronizes at 1:00. When Jerry synchronizes at 2:00 his task on his device is updated with John's information and his own updates are overwritten. (The server always wins.) He updates the task with his information and synchronizes again.
3. During a meeting with Tom at Business World, Jerry agrees to have technical specialist Harvey Mathers call Tom. He enters this as a task in his Pocket PC, assigns the synchronization category (for example, *Oracle Tasks*), and synchronizes.  
**Note:** This is the only category that should be assigned to the task. If additional categories are assigned, then the task will not synchronize.
4. Back in the office, Jerry goes to the task summary in Oracle Sales using his laptop and associates the task to Tom at Business World and assigns the task to Harvey Mathers. (Associations and assignments cannot be done on the wireless device.)
5. On the road, Jerry changes the category for a task on his Pocket PC so it is no longer the default category for synchronized tasks (for example, "Oracle Tasks"). He synchronizes, and the task is deleted from Oracle Sales.

## Restrictions

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

## Synchronizing Pocket PC

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

### Steps:

1. Start menu > Programs > Oracle Sales Synchronization.
2. Your user name is defaulted. Enter your password.
3. Perform the synchronization.
4. Review the log if you see any warning messages to find out what information did not synchronize and why.

### Restrictions

If information on the enterprise server was updated since your last synchronization, then the server information overwrites any changes you made on your device and a message is written in your synchronization log.

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

## Synchronizing Desktop Outlook

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

### Steps:

1. Outlook Toolbar > Oracle Sales Synchronization
2. Your user name is defaulted. Enter your password.
3. Perform the synchronization.
4. Review the log if you see any warning messages to find out what information did not synchronize and why.

### Restrictions

If information on the enterprise server was updated since your last synchronization, then the server information overwrites any changes you made on your device and a message is written in your synchronization log.

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

## Usage Scenarios for Handheld Devices

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

### Pocket PC

The following usage scenarios are supported for Oracle Sales synchronization:

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

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

### Palm Treo and Nokia Communicator

The following describes the usage model for Palm Treo and Nokia Communicator devices:

1. Synchronize Desktop or Laptop Outlook directly with Oracle Sales using the Oracle Sales Synchronization program.
2. Use HotSync Manager for Palm Treo or Nokia PC Suite for Nokia Communicator to synchronize Desktop or Laptop Outlook with the native Personal Information Management (PIM) application.
3. Use the browser available within the device to access real-time information.

## Devices and Supported Functionality

Oracle Sales for Handhelds currently utilizes a blended model for providing enterprise data on handheld devices. Oracle Sales Synchronization provides enterprise information directly into Microsoft Outlook and Pocket PC devices. The Oracle Sales for Handhelds connected pages provide enterprise information via an HTML browser and OA framework. The following matrix discusses which devices can be used with the Oracle Sales for Handhelds functionality.

| Device                                                                         | Direct Synchronization | Connected Pages |
|--------------------------------------------------------------------------------|------------------------|-----------------|
| Microsoft Pocket PC Devices (Windows Mobile CE, XScale or ARM Processors only) | Yes                    | Yes             |
| Microsoft Smartphone Devices (Windows Mobile SE)                               | No                     | Yes             |
| Palm OS (Blazer Browser)                                                       | No                     | Yes             |
| Nokia Communicator (Symbian OS with Opera browser support)                     | No                     | Yes             |
| Nokia Smartphone (Symbian OS without Opera browser)                            | No                     | No              |
| RIM Blackberry (Blackberry Browser)                                            | No                     | No              |

Note that wherever direct synchronization is not provided, synchronization can still be done by synchronizing to Desktop Outlook and using the appropriate Outlook connector.

## TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

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