



Oracle CRM On Demand Connected Mobile Sales Administration Guide

Version 1.0.3

March 2012

ORACLE®

Copyright © 2005, 2012 Oracle and/or its affiliates. All rights reserved.

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

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

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

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle America, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

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

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

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

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

Chapter 1: What's New in This Release

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

About Oracle CRM On Demand Connected Mobile Sales 7

Requirements for Using Oracle CRM On Demand Connected Mobile Sales 7

Supported Mobile Devices 8

Chapter 3: Using Application Composer

About Application Composer 9

Selecting Items 9

About the Application Composer User 10

Logging In to Application Composer 11

Selecting Record Types 11

Selecting Available Fields 12

Filters in Application Composer 13

Customizing Layouts 14

Clearing the Cache 15

Resetting Customizations 15

Chapter 4: Configuring Oracle CRM On Demand Connected Mobile Sales

Privileges for Oracle CRM On Demand Connected Mobile Sales 17

Record Types, Fields, and Customization 18

Limitations Affecting All Supported Mobile Devices 18

Chapter 5: Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices

Installing Oracle CRM On Demand Connected Mobile Sales on BlackBerry Devices 19

Installing Oracle CRM On Demand Connected Mobile Sales on iOS Devices 20

Chapter 6: Using Oracle CRM On Demand Connected Mobile Sales

About the Oracle CRM On Demand Connected Mobile Sales Interface 21

Logging In to Oracle CRM On Demand Connected Mobile Sales 21

Using List-Detail Record Types 22

 Using List Screens 23

 Using Detail Screens 23

Using the Calendar 24

Using CalDAV and CardDAV with iOS Devices 24

Index

1

What's New in This Release

What's New in Oracle CRM On Demand Connected Mobile Sales Administration Guide, Version 1.0.3

Table 1 lists changes made in this version of the documentation to support version 1.0.3 of the software

Table 1. Updates to Oracle CRM On Demand Connected Mobile Sales Administration Guide, Version 1.0.3

Topic	Description
"About the Application Composer User" on page 10	New topic. It describes the concept of the Application Composer User.
"Logging In to Application Composer" on page 11	Modified topic. Updated the information on logging in.
"Selecting Record Types" on page 11	Modified topic. Updated information on selecting record types and added a note.
"Selecting Available Fields" on page 12	Modified topic. Updated information on selecting available fields.
"Filters in Application Composer" on page 13	Modified topic. Updated information on filters.
"Customizing Layouts" on page 14	Modified topic. Revised the procedure for customizing layouts.
"Clearing the Cache" on page 15	New topic. It describes clearing the cache.
"Record Types, Fields, and Customization" on page 18	Modified topic. Revised information on record types, fields, and customization.
"Installing Oracle CRM On Demand Connected Mobile Sales on BlackBerry Devices" on page 19	Modified topic. Revised the installation procedure.
"Using List Screens" on page 23	Modified topic. Updated information on using list screens.
"Using CalDAV and CardDAV with iOS Devices" on page 24	Modified topic. Updated information on configuring CalDAV and CardDAV access.

Table 2 lists the chapters in the original guide.

Table 2. New Product Features in Oracle CRM On Demand Connected Mobile Sales Administration Guide, Version 1.0

Topic	Description
Chapter 2, "Overview of Oracle CRM On Demand Connected Mobile Sales"	Describes Oracle CRM On Demand Connected Mobile Sales and its uses.
Chapter 3, "Using Application Composer"	Describes how to use Application Composer to select which record types and fields are available in Oracle CRM On Demand Connected Mobile Sales.
Chapter 4, "Configuring Oracle CRM On Demand Connected Mobile Sales"	Describes how to configure Oracle CRM On Demand Connected Mobile Sales.
Chapter 5, "Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices"	Describes how to install Oracle CRM On Demand Connected Mobile Sales on supported devices.
Chapter 6, "Using Oracle CRM On Demand Connected Mobile Sales"	Describes how to use Oracle CRM On Demand Connected Mobile Sales.

2

Overview of Oracle CRM On Demand Connected Mobile Sales

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

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

About Oracle CRM On Demand Connected Mobile Sales

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

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

Requirements for Using Oracle CRM On Demand Connected Mobile Sales

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

- **Have administration privileges in Oracle CRM On Demand to enable** Oracle CRM On Demand Connected Mobile Sales.
- **Have a valid subscription for Oracle Mobile Sales Data Access.** This requirement enables Oracle CRM On Demand Connected Mobile Sales to exchange data with Oracle CRM On Demand.
- **Configure specific privileges in Oracle CRM On Demand.** For more information, see [“Privileges for Oracle CRM On Demand Connected Mobile Sales.”](#)
- **Use Application Composer to make available record types and fields to users of** Oracle CRM On Demand Connected Mobile Sales. For more information, see [Chapter 3, “Using Application Composer.”](#)
- **Install** Oracle CRM On Demand Connected Mobile Sales **on mobile devices.** For more information, see [Chapter 5, “Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices.”](#)

Supported Mobile Devices

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

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

Scroll down to the heading for *Oracle CRM On Demand Connected Mobile Sales System Requirements*.

3

Using Application Composer

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

- [About Application Composer on page 9](#)
- [Selecting Items on page 9](#)
- [About the Application Composer User on page 10](#)
- [Logging In to Application Composer on page 11](#)
- [Selecting Record Types on page 11](#)
- [Selecting Available Fields on page 12](#)
- [Filters in Application Composer on page 13](#)
- [Customizing Layouts on page 14](#)
- [Clearing the Cache on page 15](#)
- [Resetting Customizations on page 15](#)

About Application Composer

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

- Choose which record types are available
- Choose which fields are available for each record type
- Choose which fields (up to three) are available on lists for each record type
- Choose which related items are available for each record type

Selecting Items

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

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

Use the following procedure to select contiguous items.

To select multiple contiguous items

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

Use the following procedure to select noncontiguous items.

To select multiple noncontiguous items

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

About the Application Composer User

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

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

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

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

Logging In to Application Composer

Log in to Application Composer using the Application Composer user ID, as explained in [“About the Application Composer User.”](#) Oracle CRM On Demand Connected Mobile Sales does not support single sign-on (SSO).

To log in to Application Composer

- 1 Using a Web browser, go to the Application Composer URL:
https://mobile.crmondemand.com/admi nui /faces/Admi nHome
- 2 Enter the Application Composer user ID, for example, MyCompany/MyAppCompUserId.
You must insert a slash (/) between the company name and the user ID. Do not use a backslash (\).
- 3 Enter your Application Composer user password, and then click OK.

Selecting Record Types

Oracle CRM On Demand Connected Mobile Sales supports the following record types:

- Account
- Activity (Task)
- Calendar (Appointment)
- Contact
- Custom Objects 01-15
- Notes (Message Center)
- Lead
- Opportunity
- Product
- Service Request
- User

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

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

NOTE: The Notes (Message Center) is a required record type and cannot be removed from the Home screen.

To select record types

- 1 Click Select Available Record Types.

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

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

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

- 3 Click Save.

Selecting Available Fields

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

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

Make sure that you select fields that end with the letters */d*, especially Row Id. The Id fields are used to link different record types. Oracle CRM On Demand Connected Mobile Sales uses these fields to link related records, such as accounts, appointments, contacts, leads, service requests, and tasks to each other.

To select available fields

- 1 Click Select Available Fields.

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

- 2 Click a record type.

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

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

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

- 4 Click Save.

Filters in Application Composer

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

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

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

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

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

NOTE: You cannot change the filter for the Appointment object.

Customizing Layouts

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

To customize layouts

1 Click Customize Layouts.

2 Click a record type.

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

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

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

NOTE: Some record types (such as Notes) are required and cannot be removed from the Home screen. For these record types, the Include on Home Page check box does not appear on the Customize Layout screen. If the check box is visible on the screen, then the record type is not required, and you can deselect it.

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

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

5 Select the fields (maximum of three) to appear in the list view of a record and click Next.

NOTE: You cannot change the list fields for the Appointment object.

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

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

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

8 Click Next.

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

- 9 Select the related items, and click Save.

Clearing the Cache

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

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

To clear the cache

- In Application Composer, click Clear Cache, and then click OK.

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

Resetting Customizations

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

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

To reset customizations

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

4

Configuring Oracle CRM On Demand Connected Mobile Sales

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

- [Privileges for Oracle CRM On Demand Connected Mobile Sales](#)
- [Record Types, Fields, and Customization](#)
- [Limitations Affecting All Supported Mobile Devices](#)

Privileges for Oracle CRM On Demand Connected Mobile Sales

To work in Oracle CRM On Demand Connected Mobile Sales your account must have specific privileges enabled. [Table 3](#) lists these privileges. For information on granting privileges and user roles, see *Oracle CRM On Demand Online Help*.

Table 3. Privileges for Oracle CRM On Demand Connected Mobile Sales

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

If the privileges in [Table 3](#) are not available to you, contact Oracle Global Customer Support.

Record Types, Fields, and Customization

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

- Names of fields
- Names of record types
- Pick lists

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

Limitations Affecting All Supported Mobile Devices

The following limitations affect all supported mobile devices:

- **Field names in Oracle CRM On Demand Connected Mobile Sales are shortened to fit the available space.**
- Oracle CRM On Demand Connected Mobile Sales **does not check the validity of field entries as you enter each field**. When you save a record, then entire record is checked for validity. If the validity check fails, Oracle CRM On Demand Connected Mobile Sales displays the appropriate error messages.
- **You cannot delete most objects.**
- **Access to analytic content, such as charts or graphs, is not available.**
- **Proximity search is not available.**
- **Default values containing expressions configured in Oracle CRM On Demand are not supported.**

5

Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices

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

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

Installing Oracle CRM On Demand Connected Mobile Sales on BlackBerry Devices

Complete the steps in the following procedure to install Oracle CRM On Demand Connected Mobile Sales on your BlackBerry device. Back up your device data before you install Oracle CRM On Demand Connected Mobile Sales.

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

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

To install Oracle CRM On Demand Connected Mobile Sales

- 1 Open the Web browser on your BlackBerry device, and navigate to:

<https://mobile.crmondemand.com/bb>

NOTE: Oracle CRM On Demand Connected Mobile Sales supports only the BlackBerry browser. Do not use third-party Web browsers when installing Oracle CRM On Demand Connected Mobile Sales.

The Web browser displays the End User License Agreement for Oracle CRM On Demand Connected Mobile Sales.

- 2 Read the End User License Agreement, and select the check box to accept it, and then click Next.
The Web browser displays the download page.
- 3 Click Install to BlackBerry.
- 4 Follow the instructions that appear on the device to complete the installation.

BlackBerry users can install the application using Software Configuration from your BlackBerry Enterprise Server. For more information, contact Oracle Global Customer Support.

Installing Oracle CRM On Demand Connected Mobile Sales on iOS Devices

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

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

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

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

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

6

Using Oracle CRM On Demand Connected Mobile Sales

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

- [About the Oracle CRM On Demand Connected Mobile Sales Interface](#)
- [Logging In to Oracle CRM On Demand Connected Mobile Sales](#)
- [Using List-Detail Record Types](#)
- [Using the Calendar](#)
- [Using CalDAV and CardDAV with iOS Devices](#)

About the Oracle CRM On Demand Connected Mobile Sales Interface

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

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

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

- [“Using List-Detail Record Types”](#)
- [“Using the Calendar”](#)

For information on installing Oracle CRM On Demand Connected Mobile Sales on a mobile device, see [Chapter 5, “Installing Oracle CRM On Demand Connected Mobile Sales on Mobile Devices.”](#)

Logging In to Oracle CRM On Demand Connected Mobile Sales

This topic describes how to log in to Oracle CRM On Demand Connected Mobile Sales.

To log in to Oracle CRM On Demand Connected Mobile Sales

- 1 Tap the Sales icon.

Oracle CRM On Demand Connected Mobile Sales loads and then displays its log in screen.

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

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

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

- 3 Tap Login.

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

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

Oracle CRM On Demand Connected Mobile Sales stores only credentials on the mobile device and those credentials are always encrypted. If you configure CalDAV or CardDAV access, this additional information is stored on the mobile device. The mobile device settings control the access and encryption of that information.

Using List-Detail Record Types

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

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

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

Using List Screens

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

To use a List screen

Do one of the following:

- To add a new record, tap the Add (+) button in the title bar.
- To display the detailed information for a record, tap it.
- To go back to the Home screen, tap the Back button in the title bar.
- To search for records, enter information (such as a name) in the Search field and click Search. On iOS devices, scroll the list up to reveal the Search field.

Using Detail Screens

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

To use a Detail screen

Do one of the following:

- To edit the record, tap the Edit button in the title bar.
- (On iOS devices only) To go back to the Home screen, tap the middle of the title bar.
- To go back to the List screen, tap the Back button in the title bar.
- To make a phone call, tap the phone number. Calls are placed using the mobile device's phone application.
- To write an email, tap the email address. Emails are composed and sent using the mobile device's email application.
- To display a map and get directions, tap the address. Mapping and directions use the mobile device's map application.
- To jump to a related item, tap an icon in the Related Items bar. Examples of related items are contacts related to a lead, service requests related to an account, and tasks related to a contact.

Using the Calendar

The calendar shows events from Oracle CRM On Demand. The events that you create on your mobile device are synchronized with Oracle CRM On Demand. You can also synchronize your events with your mobile device's calendar application, using a CalDAV subscription.

To display events on the calendar

Do one of the following:

- Click List to display a chronological text list of your events. Then can scroll through this list to find events.
- Click Day to display one day's event.
You can change the displayed date, using the Previous Day and Next Day buttons.
- Click Month to display one month's events.
You can change the displayed month, using the Previous Month and Next Month buttons.
- Click the Today button to return to today's events when displaying the List, Day, or Month.
- Click the Add (+) button to add new events.
- Click the event to display the detailed information about it.

While viewing an event you can edit it. You can also access the related items listed at the bottom of the screen.

Using CalDAV and CardDAV with iOS Devices

Your iOS mobile device can exchange calendar and contact data with your Oracle CRM On Demand server using the CalDAV and CardDav standards. Support for these standards is an existing feature of the iOS software. However you must configure the iOS device to access your specific Oracle CRM On Demand server. Other mobile devices that have CalDAV and CardDAV compliant clients might also be able to exchange data, but these are not supported configurations. For more information on using multiple calendar and contact data sources on an iOS device, see Apple's support Web pages.

To configure an iOS device for CalDAV and CardDAV data exchange

- 1 On the iOS device, tap Settings.
- 2 Tap Mail, Contacts, Calendars.
- 3 Tap Add Account.
- 4 Tap Other.
- 5 Tap either Add CalDAV Account or Add CardDAV Account.

- 6 Enter the following account information:

Field	Description
Server	mobile.crmondemand.com
Username	Oracle CRM On Demand Connected Mobile Sales user name
Password	Oracle CRM On Demand Connected Mobile Sales password
Description	A name to describe the account

- 7 Tap Next.

The iOS device then tests the connection to the account and indicates if the connection is successful.

- 8 Click Done.

- 9 Exit from the Settings app.

- 10 If you configured a CalDAV account, then start the initial data synchronization by opening the Calendar app on the iOS device.

- 11 If you configured a CardDAV account, then start the initial data synchronization by opening the Contact app on the iOS device.

Index

A

Application Composer

- about 9
- filters 13
- logging in 11
- user 10
- using 9

B

BlackBerry, installing 19

C

- cache, clearing** 15
- CalDAV, using** 24
- calendar, using** 24
- CardDAV, using** 24
- company name** 22
- configuring**
 - Oracle CRM On Demand Connected Mobile Sales 17
 - record types, fields and customizations 18
- customization**
 - configuring 18
 - layouts 14
 - resetting 15

D

- detail screens, using** 23
- devices**
 - installing 19
 - supported 8

F

- fields**
 - configuring 18
 - selecting 12
- filters in Application Composer** 13

I

- installing**
 - on BlackBerry devices 19
 - on iOS devices 20
 - on mobile devices 19
- interface, about** 21
- iOS devices, installing** 20

L

- layouts, customizing** 14
- limitations affecting mobile devices** 18
- list screens, using** 23
- logging in**
 - Application Composer 11
 - Oracle CRM On Demand Connected Mobile Sales 21

M

- mobile devices**
 - installing 19
 - supported 8

O

- Oracle CRM On Demand Connected Mobile Sales**
 - about 7
 - configuring 17
 - logging in 21
 - overview 7
 - requirements 7
 - using 21
- overview of Oracle CRM On Demand Connected Mobile Sales** 7

P

- password** 22
- privileges** 17

R

- record types**
 - configuring 18
 - selecting 11
 - using list-detail 22
- requirements** 7

S

- security questions** 22
- Select Filter menu** 13
- selecting fields** 12
- selecting record types** 11
- setting privileges** 17
- supported mobile devices** 8

U

user name 22

V

visibility level 13