

# Best Practices for Quick Deployment of CX Sales Mobile App






## Oracle ACX Sales and B2B Service

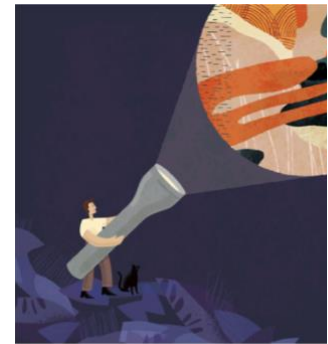
Get the new, next-generation CX Sales Mobile app and experience fast interactions and optimized workflows while on-the-go. The CX Sales Mobile app brings to your sales team a modern, action-driven UI experience in managing their daily sales activities.

The Oracle mobile apps are available for download from Apple’s App Store or Android’s Play Store. The following sections in this document provide deployment best practices for CX Sales Mobile.

### Plan your deployment

Plan and organize a controlled, phased roll out of the Feature:

	Start with a small group of test users
	Configure the feature as per your organizational requirements
	Collect feedback from test users and optimize the feature
	Document common issues and workarounds, and evaluate training needs
	Roll out to all organizational users



### Target audience

- Business Administrator
- Application Administrator
- Business Manager
- Project Manager
- Implementer

### More kit components

- [Video](#)
- [Do you know about CX Sales Mobile App?](#)

### Quick link to resources

- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Center](#)
- [My Oracle Support \(MOS\)](#)
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### Other Helpful Links

- [System Requirements](#)
- [Oracle University](#)
- [Oracle Partner Finder](#)

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## CX Sales Mobile App Deployment

### 1. Prerequisite: Check supported phones

To see the phones and operating systems supported by CX Sales Mobile, see the [System Requirements for Oracle Applications Cloud](#).

### 2. Prerequisite: Enable Adaptive Search and Workspace

A prerequisite for CX Sales Mobile app is the search capability provided by the Adaptive Search technology, which is also used in Workspace.

- Enable and configure Adaptive Search and Workspace.

**Note:** Enabling Adaptive Search also enables Workspace. For more information, see [Enable Workspace and Other Features that Use Adaptive Search](#) in the Implementing Sales guide.

### 3. Create Profile Options

- Create the CXM\_ENABLE\_MOBILE\_APP profile option to enable the CX Sales Mobile app.

### 4. Create a QR Code

Using QR code automatically populates sign-in settings making it easier for users to sign in:

- Sign-in to your Oracle CX Sales application and find the host URL.
- Create the URL for the QR code. To do so, embed the host URL and the authentication mode in the following general URL format:  
`cxm://?host=<host URL>&type=<authentication type>`

For example:

- Sample QR code URL for basic authentication: `cxm://?host=<host value>&type=basic`
- Sample QR code URL for SSO authentication: `cxm://?host=<host value>&type=sso`

### 5. Install the CX Sales mobile app and enable QR code for sign in

- Download and install the app from Apple App Store or Android Play Store.
- Sign in using the QR code or alternate options.

For set-by-step instructions on prerequisites, creating the QR code, and installing the app, see [Get Started with Your CX Sales Mobile Implementation](#).

### 6. Enable OAuth for longer sign-in periods (optional)

If you use the Oracle Identity Cloud Service, you can enable OAuth authentication tokens to allow your users to stay signed-in for longer. With OAuth authentication tokens, your users won't need to re-enter their username and password every time they launch the application.

**Note:** Oracle Identity Cloud Service is not a part of the CX Sales application. It is a separate paid service that provides identity management, single sign-on (SSO), and identity governance for on-premise and cloud applications and for mobile devices.

- Register the CX Sales Mobile application with Oracle Identity Cloud Service.

- Register your Client ID and the Client Secret for the CX Sales Mobile application in the Manage CX Cloud Mobile OAuth Configuration task in the Setup and Maintenance work area.
- Create the CXM\_ENABLE\_OAUTH profile option to enable the OAuth feature and set its Profile Value to **Yes** at **Site** level for all users or at **User** level to test configuration with a specific user.

For more information, see [Enable Sales Representatives to Stay Signed in to the Application for Longer](#) in the Implementation Sales guide.

## 7. Configure the CX Sales mobile app for your organization

- Activate a sandbox on the desktop CX Sales application for the user and configure as required.
- Use profile options to configure the App. For details, see [Enable or Disable Features Using the Profile Options](#).
- Configure the new CX Sales Mobile app using the CX Sales Mobile configuration tool. For details, see [Configure the App Using the Configuration Tool](#). Making more configurations.

**If you are currently using the Generation 2 Oracle CX Cloud mobile app:**

- Use the migration process to move your existing app configurations, such as Lists, Details, and mobile page layouts, to the new CX Sales Mobile app.  
For more information, see [Copy Your CX Cloud Mobile Configurations to CX Sales Mobile](#).
- Use a sandbox to move page layouts. For identification, migrated page layouts are suffixed with ‘\_migrated’.

If you need to migrate the changes made to an already-migrated page layout, create a new page layout with the changes and migrate it.

**Note:** Migrating a specific page layout is a one-time action. After it is migrated, you cannot again migrate the same page layout for subsequent changes.

- Evaluate whether your existing custom scripts for a page layout are still required.
- Create the required custom scripts. Custom scripts for page layouts are not migrated, but you can copy them into the new app. For more information, see [Copy Your CX Cloud Mobile Configurations to CX Sales Mobile](#).

## 8. Validate and publish your configurations

Test your configurations in the app in a sandbox before publishing. For more information, see [Test Your Configurations](#).

- Ensure you make the configurations in an active sandbox on the desktop CX Sales application.
- On sign in to the CX Sales Mobile app, ensure that you see the latest updates in the app sandbox.
- Go to **Settings > System** in the CX Sales Mobile app and check the **Sandbox Name and Last Download Time** to confirm it's the correct sandbox with your changes.

If you make changes in the sandbox again, close the app and sign-in again to download and view the subsequent changes.

- Set the email or distribution list on which to receive the app ratings and feedback submitted by app users. Users specify their ratings and feedback using Settings > Rate the App. For more information, see [Specify the Email Addresses that Receive the Rate the App Feedback](#) in the Implementing Sales guide.

Publish your new configurations:

- Publish the sandbox after all validations are complete.

## 9. Other points to consider

- You can assign custom security roles to homepage layouts to enable specific homepage cards for specific custom security roles.
- You can enable or disable a homepage card using the Mobile Application composer.

The Sales accounting calendar setup affects the sales pipeline information visible in the app's home page:

- If an accounting calendar is enabled and set up for quarters in the ZCA\_COMMON\_CALENDAR profile option, then the pipeline uses the accounting calendar to determine the period for the current and next quarter.
- If accounting calendar is not enabled, the pipeline shows information for the standard Gregorian calendar quarters (January to March, April to June, July to September, October to December).
- For more information, [Implementation Considerations](#) in the Implementation Sales guide.

## Resources

- [Mobile](#) chapter in the Getting Started with Your Sales Implementing guide
- [Mobile Applications](#) chapter in the Implementing Sales guide
- [Implementation Considerations](#) in the Implementation Sales guide

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