Quick Start User Guide

More4apps Oracle Cloud ERP Toolbox

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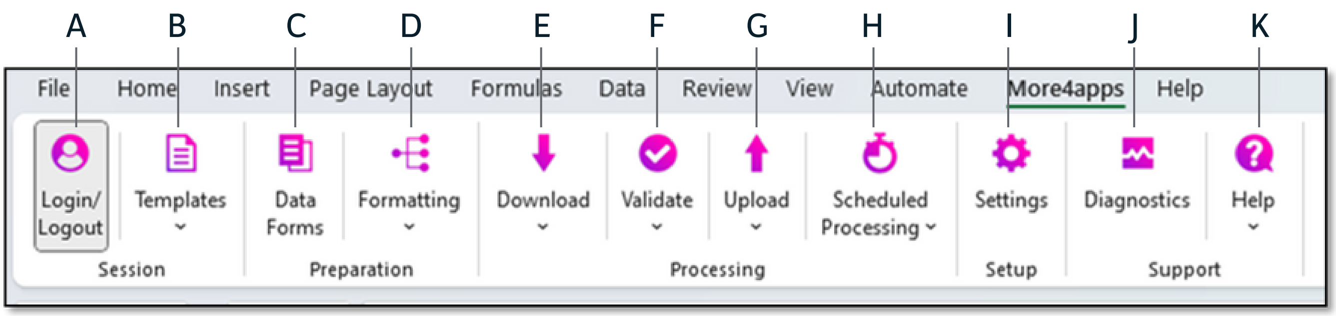
More4apps | more4apps.com | helpdesk@more4apps.com

This Quick Start User Guide is designed to help you get started with the More4apps Oracle Cloud ERP software. To install your More4apps product, access the installation guide from the ReadMe file in the downloaded zip file. If you have questions not covered in this guide or if you're ready to take advantage of the more advanced features, we recommend referring to the user guide which is accessible from the Help menu on the More4apps Ribbon.

More4apps Ribbon



A. Login/Logout of Oracle
B. Create/Copy a new sheet or Edit an active one
C. Form showing data with value lists*
D. Normalize/de-normalize data*
E. Download data from Oracle
F. Run More4apps validation
G. Validate and upload data to Oracle
H. Submit and refresh scheduled processes in Oracle (not all integrators)*
I. Change settings (not all integrators)*
J. Run diagnostics to assist support troubleshooting*
K. Access various More4apps Help resources

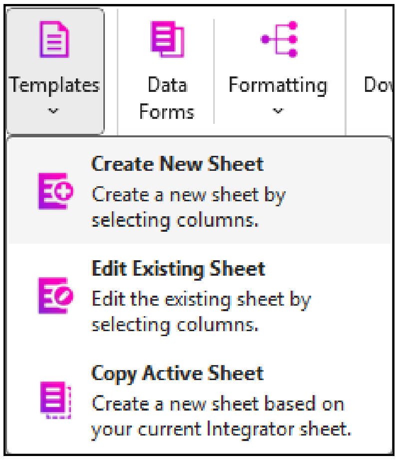
*Not covered in this Quick Start User Guide. Please refer to the complete User Guide for more information.

Getting Started

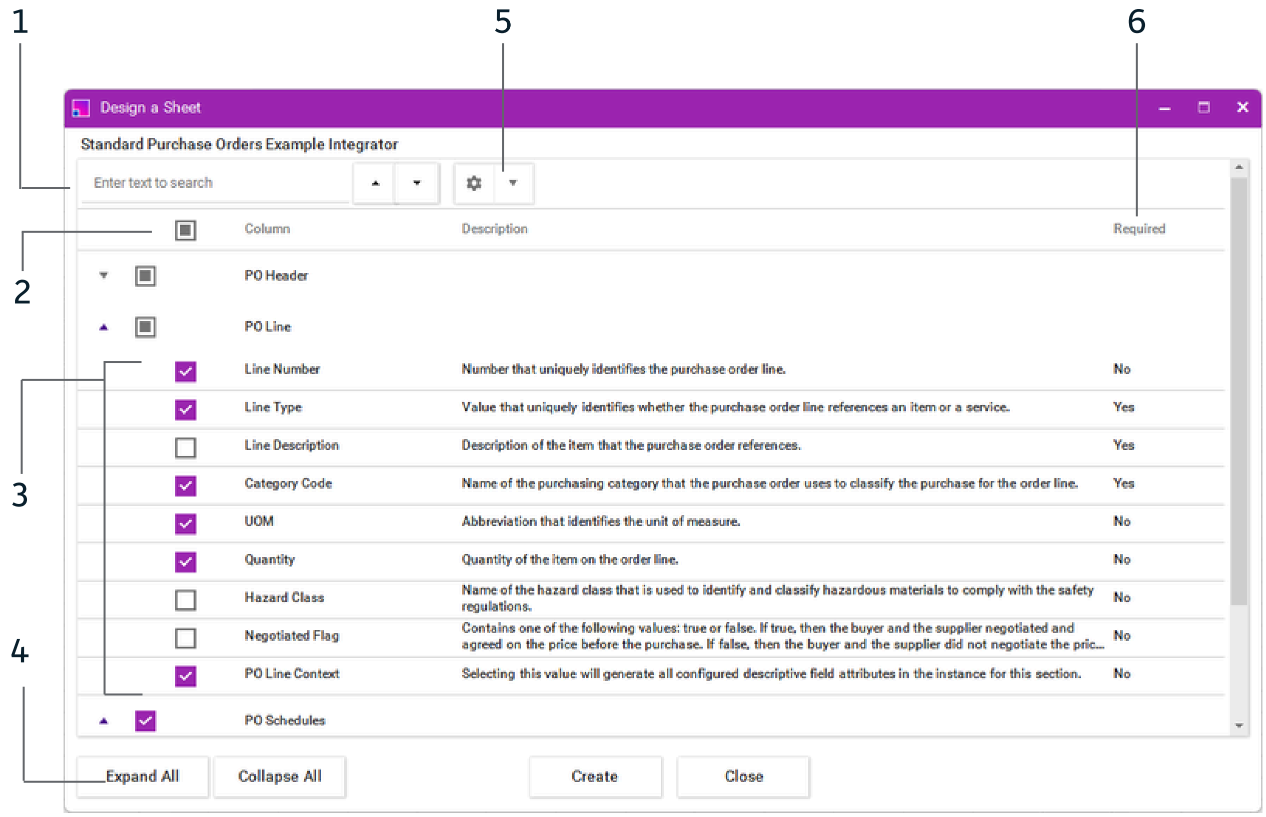
1. Login

- Open a new Excel Workbook and click on **More4apps** in the top menu to display the More4apps ribbon.
- Click **Login/Logout.**
- Select the relevant Instance from the drop-down list and click Login. If you don't see your Instance listed in the dropdown, see page 5 for steps to set it up.
- Enter your Oracle Cloud credentials and click **Sign In.**

2. Open a Template



- Click on **Templates > Create New Sheet**.
- Select the Module and Integrator you want to work with and click **Select**.
- A **Designer** will open where you can search and view all available sections, their corresponding fields, and descriptions. Remove/add fields or entire sections by selecting or deselecting the checkboxes. Click **Create** to create the new worksheet.



1. Search to find a particular field/column
2. Check and uncheck to select or unselect all fields
3. Select or deselect checkboxes to tailor your fields
4. Expand or Collapse Sections for easier viewing
5. Adjust search settings
6. Indicates required fields

Tip – You may also choose to use one of our prebuilt Example Sheets available here, or a workbook shared by one of your colleagues.

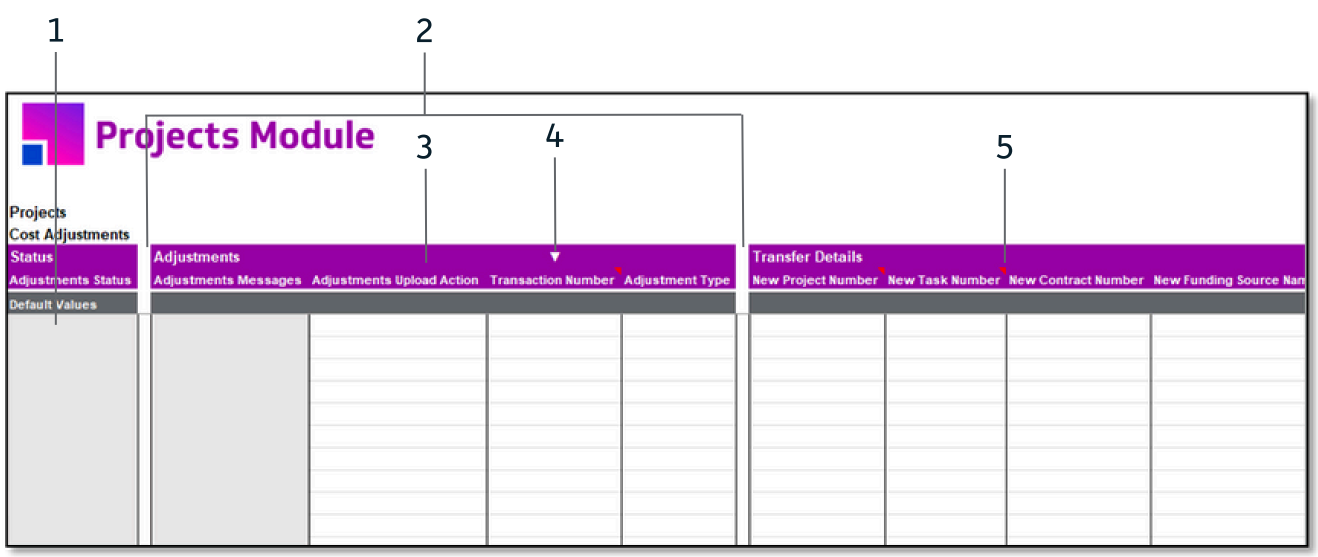
3. Review Template and Download Data

Template Overview

The **Designer** will create a new worksheet with all the fields you selected. Fields are separated into sections, and the first section is reserved for More4apps Status fields (see image below).

If further customization is needed, you can remove unnecessary fields and sections using standard Excel functionality.

Tip – Download a known-good example to see how the data is mapped to Oracle (refer to page 6 on how to customize your workbook).



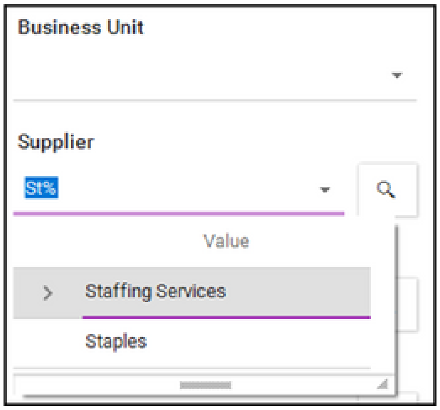
1. Light grey columns are reserved for More4apps Status & Data Error messages (Read-Only)
2. Sections group fields logically
3. Data Fields mapped to Oracle Fields
4. White marker indicates filters that can be used with Download via Sheet
5. Red marker shows fields with tips in comments

Download Data

Click **Download** on the toolbar, then **Download Via Form** or **Download Via Sheet.**

Use **Download Via Form** if you want to 'Query By Example'. The Download Form has dropdown LOVs and Search Fields to assist your download selection.

Use **Download Via Sheet** when you know your search criteria - e.g. enter a list of 'Order Numbers', highlight the cells, and click **Download > Download Via Sheet.**



Tip – When searching, you must at least enter a wildcard '%' before you click the magnifying glass. Then you can use the LOV to select a value from the results list.

4. Update or Create a Record

Update

To Update an existing record, you should first download the record. You can edit the data directly on the worksheet, or open **Data Forms**. The form has **LOV** and **Search** controls to assist data entry.

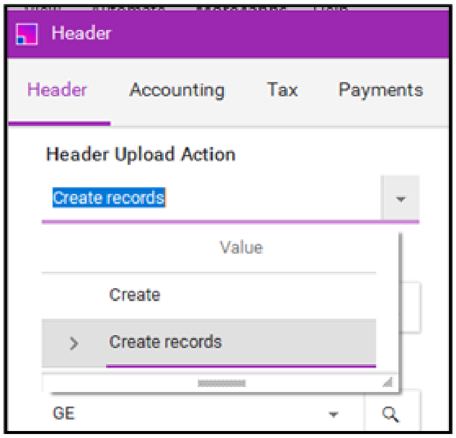
Create

To Create a new record, go to a new row and enter your data or open **Data Forms** to complete the necessary information.

You must specify an **Upload Action** e.g.:

- **Create**– applies the action only to that section
- **Create Records** – applies the action to ALL rows and sections for the record you are creating

Note: Upload Actions depend on the module



When ready to Upload data, select one or more rows and click **Upload > Upload Selected**.

Tip – If creating a new record by copying an existing record, remove all unique identifiers (e.g. Invoice Number).

Tip – Optionally, click Validate to check the data before Upload.

Tip – Choose Upload All only if satisfied that ALL rows on the sheet are ready to be sent to Oracle.

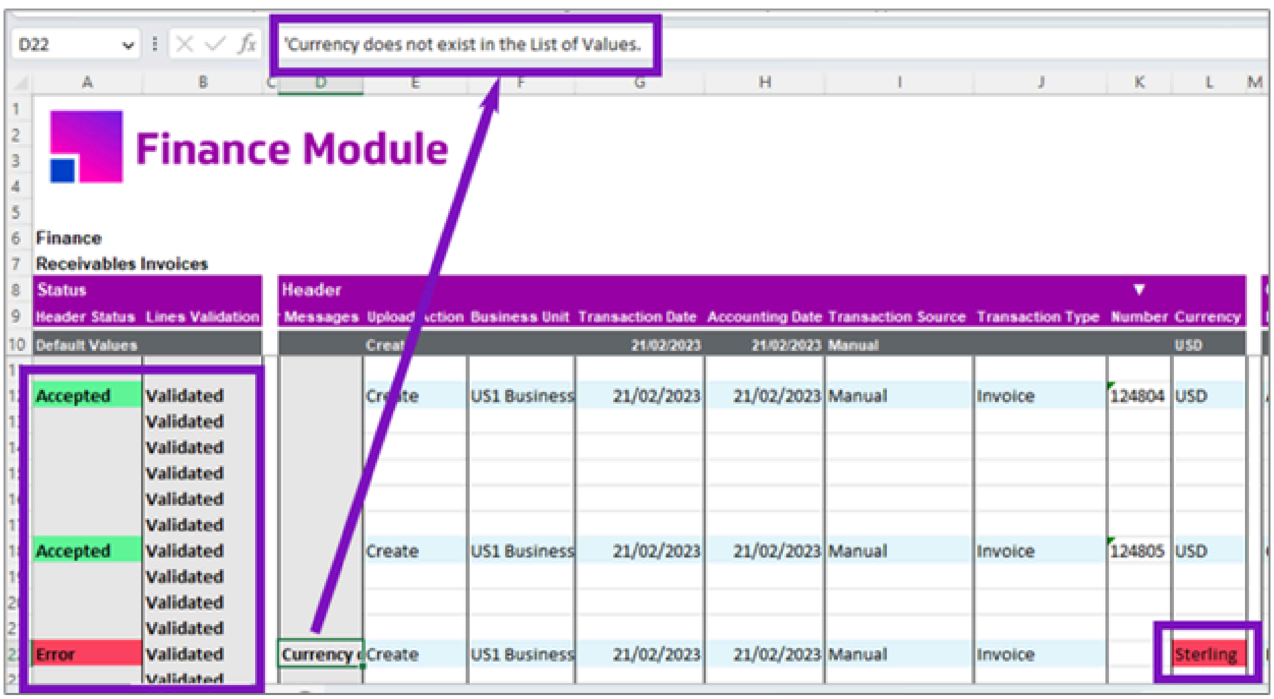
5. Validation and Error Messages

Our Cloud Integrators have two levels of validation - More4apps Validation and Oracle Validation.

More4apps Validations are built into the spreadsheet and check for common errors. Click Validate on the More4apps Ribbon to run this validation. This validation is also automatically run during every Upload.

Oracle Validation also runs during Upload and is based on all validation rules defined by Oracle in their web services. It is possible for activity to pass More4apps Validation but fail Oracle Validation.

If a row fails validation, you will see an "Error" status and an associated error message in the Status and Message columns (please note that you may need to expand the formula bar to see the full error message). Additionally, the field(s) that failed will be highlighted in red.



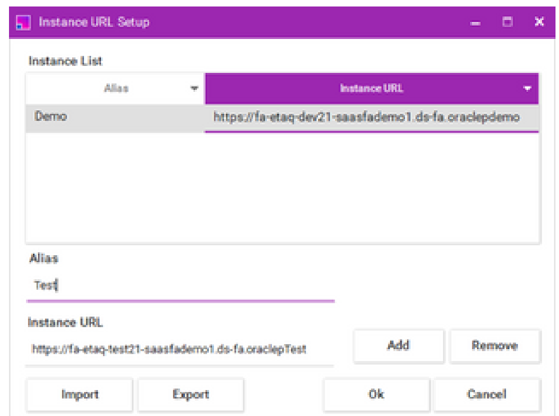
Advanced Tips and Information

Connecting to Environments/Instances

You can easily connect the same More4apps product to multiple Oracle Cloud environments (e.g., Prod, Test, Dev) by following these steps:

1. Click **Login/Logout** on the More4apps Ribbon and click Instances.
2. In the **'Alias'** field, give a name to the environment (e.g., Prod, Test, Dev).
3. In the **'Instance URL'** field, copy the URL link you use to access Oracle Cloud ERP.
4. Click **Add** and then **OK** to save the details.

Tip – Share your Instance URLs with your team using the Export/Import buttons.



Customize Your Workbook

New Sheets are generated with all available columns for the integrator. We recommend you customize your worksheet by deleting unnecessary columns. This will simplify your usage of the integrator and will also speed up downloads and uploads as all columns on the worksheet are cached and validated, even if hidden.

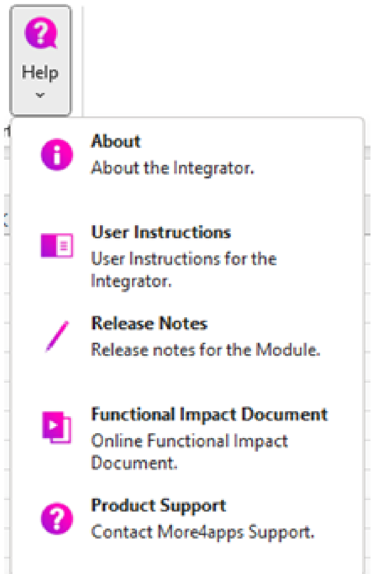
Tip - Download a few known-good examples into the full sheet.

- Columns without data can usually be safely deleted.
- Columns with default data that you don't typically update can also be deleted - Oracle will apply the defaults during the upload process.
- If you are not sure if a field is required, temporarily disable it by moving the label from Row 9 to Row 7. Test your upload and if it works as expected, it is safe to delete the column.
- If needed, you can return the label to Row 9 or insert a new column and enter the label in Row 9.

Tip – It is preferable to have a few 'task-focused' worksheets rather than a one-size-fits-all approach.

More4apps provides example sheets for certain use cases, which you can find online.

Other Useful Resources



Click the **Help** button to get links to:

- User Instructions
- Release Notes
- Functional Impact Documents
- More4apps Community

Important: When reaching out for Product Support by completing a support case online, please provide:

- A copy of your worksheet with representative data and error messages.
- If possible, replicate the issue with 'Diagnostics' turned on before saving and sending the file.
- Version details from the **Help > About** page.