

# Benefit from Field Force Manager faster.

[fieldforcemanager.com](https://fieldforcemanager.com)

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## Welcome

Thank you for choosing Verizon Field Force Manager as your mobile workforce management and productivity solution. You're well on the way to increasing mobile employee efficiency, improving customer service and reducing operational costs. You'll use the web administration software to monitor and manage your mobile workers. And they'll use the mobile app to report data and receive important information about their workday.

## Get started the right way.

To begin successfully, please follow these steps and check them off as you go:

### 1. Read your welcome email

Within 24 to 48 hours after subscribing to Field Force Manager, you'll receive a welcome email with important information about your account

### 2. Read the wizards overview within this guide

The overview provides instructions for using the registration and setup wizards for the web administration software

### 3. Use the wizards

The wizards help you register with Field Force Manager and configure the web application correctly in about 15 minutes

### 4. Plan your deployment.

If you're purchasing new mobile devices, we recommend configuring them in the office. But if you're adding the mobile app to your workers' existing phones, we recommend scheduling a time for them to bring their mobile devices into your office so you can set them up. It takes about five minutes for each device. Review setup instructions for specific models on the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support)

### 5. Configure mobile device GPS location settings

Before you download the mobile app on mobile workers' devices, configure the GPS location setting for each device. The configuration steps vary by device. So for specific device instructions, please refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support)

### 6. Download and test the mobile app

Review the worker list in the web application to ensure the mobile app is properly communicating and capturing a GPS signal before giving devices to mobile workers. The download steps vary by device. So for specific device instructions, please refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support)

## 7. Get trained

You can attend live training sessions about the web application. For your mobile employees, you can find additional training materials at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support)

## 8. Need assistance?

Reach out to our Field Force Manager customer support team 24/7 by email at [smart.clicksoftware.com/ffm-support](mailto:smart.clicksoftware.com/ffm-support) or at the phone number provided in your welcome email

## Make registration and setup a breeze.

Get Field Force Manager up and running quickly with our Registration and Setup Wizards. Begin with the Registration Wizard to add more detail to your account and provide us with the information we need to support you. Then the Setup Wizard helps you configure the web management software correctly. Both wizards should take less than 20 minutes to complete.

## How to use the Registration Wizard

Make sure you have your account ID, user name and password from your welcome email before you start.

1. Click the link provided in the welcome email to access the web application. After you enter your account ID, user name and password, you'll be prompted to start the Registration Wizard
2. Select the carrier you're using, then click **Next**
3. Complete "Your Objectives and Challenges," so we know better how to support you, then click **Next**

**Your Objectives and Challenges**  
Your answers will help us recommend training for you and your team.

**What are your primary objectives in using Field Force Manager?\***  
(Check all that apply)

Tracking mobile workers   
  Mobile time cards   
  Job dispatching  
 Other:

**Which Field Force Manager package did you purchase?\***  
(Check all that apply)

Limited   
  Basic   
  Pro

**What challenges are you trying to address with Field Force Manager?\***  
(Check all that apply)

Improve customer satisfaction   
  Improve productivity   
  Reduce overtime  
 Provide proof of visit   
  Improve worker safety   
  Reduce fuel costs  
 Other:

4. Complete “Your Deployment Plan” to provide us with information about the size and timing of your deployment, then click **Next**

**Your Deployment Plan**

Your answers will help us tailor our recommendations to ensure the most efficient deployment.

**What is the primary objective of this deployment?\***

Evaluation    Pilot before Rollout    Full Rollout

**How quickly do you expect to deploy?\***

< 10 days ▾

**How many units of Field Force Manager did you purchase?\***

**Total employees in your organization?\***

1-5 ▾

**Number of mobile workers in your organization?\***

1-5 ▾

**Will you be integrating Xora with one of our partners?\***

Not at this time ▾

5. Fill in “Your Contact Information,” then click **Next**.

**Note:** In the “Primary Mobile Phone Number” field, please enter the number of the person who ordered Field Force Manager. This person is the main contact for your account. Then enter the name, email address and phone number of the person managing your deployment, even if it’s the same person for both.

**Your Contact Information**

Your answer will help us identify our main point of contact in your organization.

**To help us match your information with your order, please provide:**

Organization name\*:

Primary Mobile Phone Number\*:

**Who will manage the deployment?**

Name\*:

Email\*:

Phone\*:

Your contact information will only be used for product functionality (password reset, email alert, scheduled reports) and to notify you of new functionality. We take protecting your data very seriously and we will NEVER give out your email address.

**What is the best time to contact you? \***

Before 08:00 AM

08:00 AM - noon

noon - 04:00 PM

04:00 PM - 07:00 PM

6. Enter the name and contact information of your Verizon Wireless business specialist (if you know it), then click **Next**.

**Note:** This information is optional. Click **Next** to continue if you do not wish to enter this information.

7. Confirm that the information you’ve provided is correct, then click **Next**.

**Note:** You’ll return to the Registration screen, where you’ll log in and proceed to the Setup Wizard.

## How to complete the Setup Wizard

1. The first screen of the wizard lists the setup operations you’ll perform. After reading it, click **Next** to begin the setup process

**Field Force Manager Setup**

Welcome to Field Force Manager Setup

Setup is the first of three stages to roll-out Field Force Manager. After Setup, you will do device software installation and employee training.

During the next five minutes, we will help you setup:

- Mobile Workers
- Hours of Operations & Battery Life Settings
- Common Alerts
- Common Forms
- Common Job Types

Choose Continue to begin.

2. Review and update user details, then click **Next**

**Note:** This screen reflects information captured on the initial order and includes mobile-user phone numbers and the package your company is using. Please make sure all of the information is accurate.

**Update each user with the correct name and time zone for your workers**

First Name	Last Name	Preferred Name	Time Zone	Phone Number	Package	Language
David	Grohl		Central Time (GMT-06:00) ▾	no phone number	no package	English ▾
Jim	Morrison		Central Time (GMT-06:00) ▾	no phone number	no package	English ▾
Steven	Tylor		Central Time (GMT-06:00) ▾	no phone number	no package	English ▾

3. Choose the industry that best fits your company. Field Force Manager uses this information to install configurations that have proven to be helpful to other users. Click **Next**

**Select your Industry**

Select the industry that best describes your company. This selection will be used to install configurations other customers have found useful.

**Field Force Manager Default**

**Field Service**

**Construction**

**Home Health Care**

**Landscaping**

**Utility**

**Security**

**Disaster Recovery**

- Set mobile-app operation and battery life settings. Use the following tips and best practices when you enter settings. When you have completed all settings, click **Next**

**Note:** It's important for all settings to be correct. If you have any questions, please contact the Field Force Manager customer support team 24/7 by email at [ffmsupport@fieldforcemanager.com](mailto:ffmsupport@fieldforcemanager.com) or at the phone number provided in your welcome email.

- **Hours of Operation**

The best practice is to track workers' activity only during your organization's scheduled hours of operation. This will help preserve their privacy

- **Auto Application Startup**

The best practice is to enable this feature, so you can ensure the mobile app starts when workers turn on their devices

**Note:** Mobile devices must support SMS messaging and the service must be active. SMS messaging support is not necessary with Android® and iOS devices.

- **Auto Application Shutdown**

In a typical deployment, this feature is enabled so employees don't have to remember to exit the mobile app at the end of their shift.

**Note:** If your mobile workers incur work hours beyond the hours of operation you just set, then it's best to not use this option, as it will automatically shut down the mobile app. This ensures that the mobile app continues to operate outside of the regular shift hours.

- **Auto-Launch to Background**

If you enable this setting (along with Login with Last PIN in the web application), the mobile app is sent to the background when mobile workers log in. If the setting is turned off, workers immediately see the mobile app menu when their device is powered on.

**Note:** Auto-Launch to Background is typically enabled when workers aren't expected to use the features of the mobile app.

- **Max Performance**

This setting results in more frequent GPS pings and is ideal if you want more frequent worker-location reporting.

**Note:** We don't recommend this setting if workers aren't able to charge their mobile devices during the workday, because this setting may drain a device's battery.

- **Optimum Performance (Default)**

This setting balances the rate of GPS pings against the length of a mobile device's battery charge

- **Max Battery**

We recommend you enable this setting if workers are not able to charge their devices during the workday because it helps preserve the strength of the battery

**Note:** If you prefer, you can also customize these battery performance settings in the Administration section of the web application. You can refer to the user guide, which is located at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) on the Documents page.

- Choose whether or not you want to receive a Daily Activity Report, and click **Next**

**Note:** We recommend selecting this report, which provides a quick but comprehensive overview of a day's activities in the field.

- Confirm the default settings, and click **Next**

**Note:** The best practice is to confirm these settings, because they provide information that is helpful in managing your workers.

- Click the link provided on this screen to access training videos for your workers

**Note:** We recommend that you attend the training sessions outlined in your welcome email message, as well as visiting [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) to familiarize yourself with the different training materials available to you.

## Simplify mobile app adoption with our top tips.

Before your mobile workers start using the mobile app, we recommend sharing with them our infographic "Get mobile workers on board with the benefits of Field Force Manager." Here are specific tips and responses to frequently asked questions to help you and your employees work more efficiently with the mobile app.

### Before you download the mobile app

Confirm your device supports Field Force Manager.

- Refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) to confirm that a particular device is supported

Configure GPS location settings for each device.

- Refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) and click on your device type for instructions. We recommend configuring all GPS settings at the same time, rather than a few at a time
- Some mobile devices can lock GPS to prevent it from being enabled or disabled. Please refer to your device's user manual for instructions, or contact your carrier for further information

## How to download the mobile app

Review the download and installation instructions.

- Refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) for step-by-step instructions of each supported device and model
- Visit the platform app store for smartphones and tablets – Google Play™ or Apple® App Store® – to search for Field Force Manager and install the mobile app. The same Apple ID or Google Play account can be used for all devices
- The mobile app must be downloaded and activated on each device individually

## After you download the mobile app

Activate the mobile app.

- Refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) for activation instructions of specific devices and models

Confirm that the mobile app is communicating with the web application.

- Go to the Worker list to view the status of the devices. Confirm that the web application and the mobile app are communicating with each other. See if the mobile app is collecting a strong GPS signal by viewing the Last Update/ Notifications column on the far right side of the page

Last Update / Notifications
09:26 AM, 05/16/2013 App exited App exited App exited
11:36 PM, 05/17/2013 Update Current Location Current High
10:00 AM, 05/17/2013 Update past due Location is turned off Update past due
05:15 PM, 05/16/2013 App exited App exited App exited

## Frequently asked questions

### How do I help my mobile workers get started using the mobile app?

There are five steps to getting started:

1. Make sure mobile workers' names and their devices are entered in the web management application
2. Configure the GPS location settings on each phone
3. Download and install the mobile app on each phone
4. Launch the mobile app on each device
5. Verify the mobile app on each phone is properly communicating and collecting a GPS status by viewing the Worker list in the web application

### What's the best way to deploy the mobile app with our employees?

We recommend you download, install and test the mobile app on each device before sending the device to the field.

### How do I activate the service?

The activation steps vary by device, so go to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support). Click the image for a particular device, and follow the instructions in the section called "Activate and Login to Field Force Manager."

### Our mobile workers aren't in the office frequently. Can we ask them to help us activate their devices in the field?

Yes. If they have a smartphone or tablet, ask them to get the mobile app from the store on their devices. Tell them to search for Field Force Manager in the store. If they don't have a smartphone or tablet, then refer to the Devices page at [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) for specific instructions.

**Note:** Make sure mobile employees know how to configure the GPS location setting. They'll also need to know the user name and password of their Apple ID or Google® accounts.

### Why don't all devices support the same options?

The service package, which is viewable on the Devices page located under the Administration tab, is not the same for each device. Additionally, different devices support different features. For example, more advanced features like Signature/ Photo Capture and Bar Code Scanning may not be available on a basic phone.

### How do I turn the GPS location settings on?

The process varies by device. To find instructions for how to enable GPS tracking on a particular device:

1. Go to [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) and select your product version
2. Select the Devices page and click the image of the device
3. Follow the instructions in the section named "Pre-Installation: Enable Location Tracking on the Phone"

### How do I synchronize the mobile app with the web application?

The mobile app should automatically sync with the web application. To manually sync, open the mobile app. Smartphone users should tap the **Sync** icon to synchronize the two applications. Basic phone users should press \* and then # to synchronize the two applications.

**Note:** To confirm that the web application is getting an accurate GPS setting from the mobile app, we recommend taking the device outside in a location that has a clear view of the sky.

### The mobile employee has phone service, but I can't pinpoint a location via GPS. Why is this happening?

The most common reason you may not be able to pinpoint a location via GPS is because the device may not have a direct line of sight with the GPS signal. Vehicles, parking garages and "urban canyons" can block reception. To receive the best possible GPS signal, make sure the phone is outside in a location that has a clear view of the sky.

### Is it OK to power down a phone after a shift ends?

Yes. Before the mobile worker turns off their device, they should always exit the mobile app first. To help enforce this, you can configure the mobile app to auto-shutdown after shifts. This can be configured within the Setup Wizard.

**Note:** To help devices operate and maintain connections, you should encourage mobile users to power cycle—turn off and then turn on—their mobile devices once a week.

### How can I ensure that the mobile app launches when it's scheduled to each workday?

Simply set the hours of operation, which can be done through the Setup Wizard or the Administration Settings, for each worker, and the mobile app will launch automatically as scheduled.

### How do I know if the version of the mobile app my workers are using is current?

Click on the **Devices** tab within the web application to see the version of the mobile app each worker is running. Then, go to [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support), and click **Devices**. This section of the site lists the most recent version of the software.

### How is the mobile app updated on the device?

On devices that use the Apple App Store or Google Play, an update notice appears on the store icon. You then access the Update function in the store. You must notify users of other devices about updates. For non-smartphone users, visit the Devices page on [smart.clicksoftware.com/ffm-support](http://smart.clicksoftware.com/ffm-support) for specific instructions.

### Do all mobile devices use the same PIN?

No. Each individual user has a unique PIN, which is automatically created for them when the account is set up. It is based on the last seven digits of the mobile device phone number. If you want, you can change the PIN.

### Where can I find the PIN for a device?

Each user has a unique PIN. Devices do not have a PIN. The easiest way to find the Field Force Manager PIN is to go to the Users page located within the Administration tab. The PIN is listed for each worker.

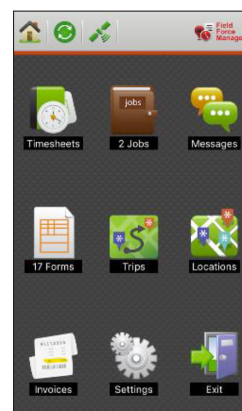
Username	Pin	Group	Role
nirvana	53757	Default	Mobile Worker
rhoward	99030	Default	Super User
6514455567	65946	Default	Mobile Worker
6514455566	44782	Default	Mobile Worker

## Use the mobile app on a smartphone.

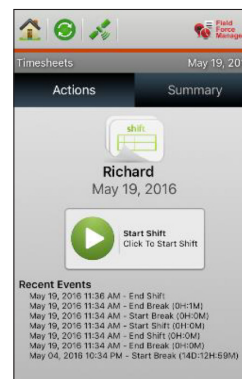
### Mobile timesheets

#### Start a shift.

1. Access the mobile app's main menu and click the **Timesheets** icon



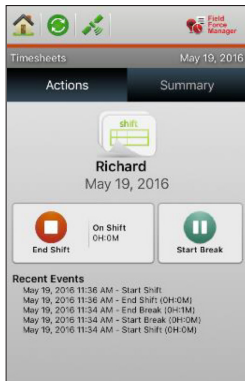
2. Click **Start Shift**



3. After you start your shift, click the **Home** icon to return to the mobile app's main menu

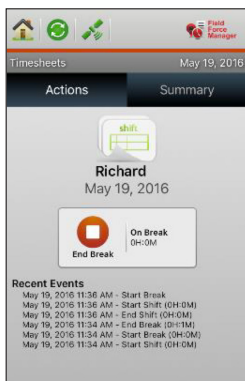
**Start a break.**

1. Access the mobile app's main menu and click the **Timesheets** icon. The Timesheets menu appears
2. Click **Start Break**



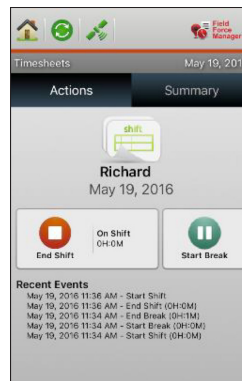
**End a break.**

1. Click **End Break**
2. After clicking **End Break**, click the **Home** icon to return to the mobile app's main menu where you can choose your next job or activity



**End a shift.**

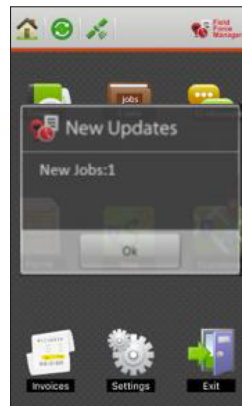
1. Access the mobile app's main menu and click the **Timesheets** icon. The Timesheets menu appears
2. Click **End Shift**
3. After you've ended your shift, click **Back** to return to the mobile app's main menu and click **Exit** to leave the mobile app



**Mobile jobs**

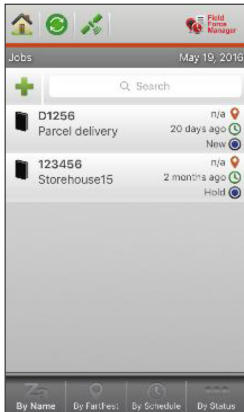
**View and start a job.**

1. Access the mobile app's main menu and click **Jobs**
- Note:** If you've been assigned new jobs, you'll see a Job Notification Alert, as well as an indication of the number of new jobs assigned to you under the Jobs icon.

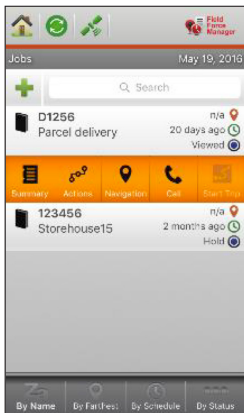




2. Click **OK** to see the new jobs you've been assigned

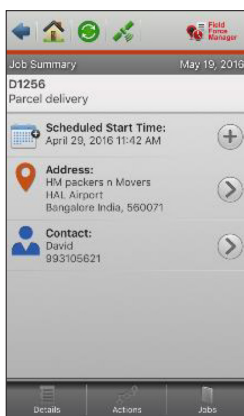


3. The Jobs menu appears. To view and start a job, click the job

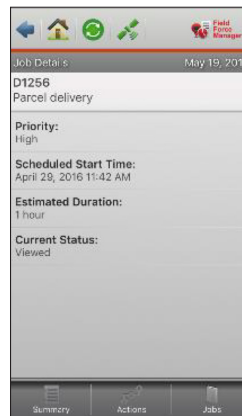


4. Click **Summary** for an overview of the job

5. The Job Summary menu appears. Click **Job Details** to get additional information about the job



6. The Job Details menu appears. Click **Actions** at the bottom of the screen when you're ready to start the job

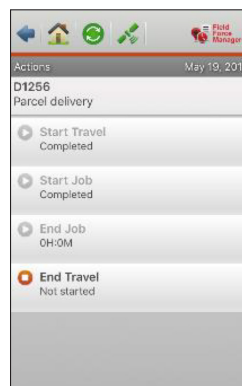


7. The Actions menu includes the specific actions required to perform the job. Click **Start Job** to begin the job

**End a job.**

1. When you've completed all the required job actions, click **End Job**

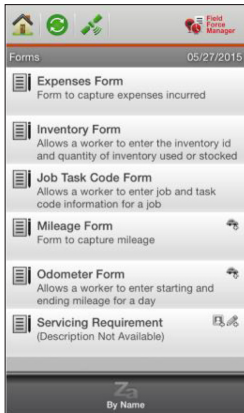
**Note:** Clicking End Job sends all job data to your office.



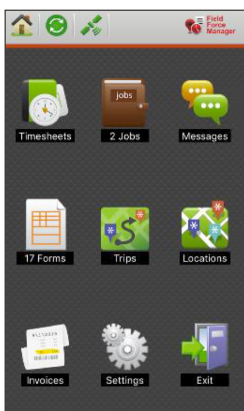
## Mobile forms

### Complete a mobile form.

1. Access the mobile app's main menu and click the **Forms** icon



2. The Forms menu appears. Click the form you need to complete from the list



3. The selected mobile form appears. Click a window or field to begin data entry

4. Enter your data into the form and click **Submit**

**Note:** The information you submit will be sent to your office.

5. After clicking **Submit**, you'll be returned to the Forms menu

## Trip forms

### Start a trip.

1. Enter the Start Odometer value
2. Check the box for "Auto-fill with last end odometer" to fill in your last odometer value
3. Select **Category**
4. Select **Purpose**
5. Select a job to link to your current trip, if applicable
6. Enter notes related to your trip
7. Tap **Start**

**End a trip.**

1. Enter the End Odometer value. The odometer value will be calculated by your Start and End Odometer entries
2. Enter Additional Expenses, if applicable
3. Enter trip-related notes
4. Tap **End**

**View trip list and details.**

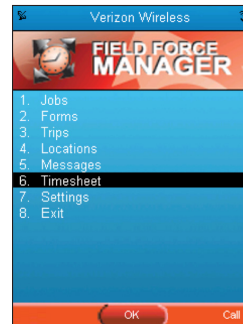
Once you end a trip, the Trip Log screen appears on your smartphone showing a list of all the trips you've taken. Trips can be sorted based on date, distance and cost from this screen. Click on any trip to open up the Trip Details page for that trip.

Today	Distance	Cost
10:01 PM	4.0 mi	\$ 5.56
09:53 PM	6.0 mi	\$ 12.00
08/29/2017 08:51 PM	400.0 mi	\$ 226.00
08/23/2017 06:42 PM	4913.0 mi	\$ 2775.84

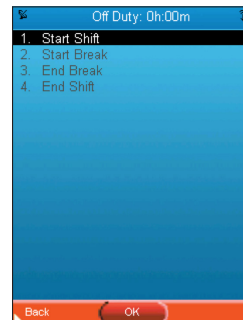
Trip Details		09/15/2017
Today	10:01 PM	
Distance		4.0 mi
Commuter Distance		3.0 mi
Total Expense		\$ 5.56
Category		Business
Purpose		Business Trip
Duration		3m
Start Odometer		2140.0
End Odometer		2144.0
Notes		Business Travel

**Use the mobile app on a basic phone.****Mobile timesheets****Start a shift.**

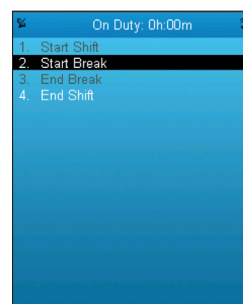
1. Access the mobile app's main menu and click **Timesheet**. Then click **OK**



2. Click **Start Shift**, then click **OK**
3. After you have started your shift, click **Back** to return to the mobile app's main menu

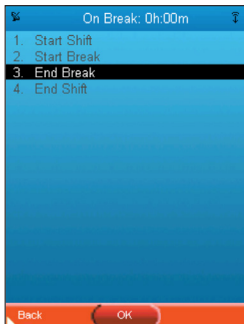
**Start a break.**

1. Access the mobile app's main menu and click **Timesheet**. The Timesheets menu appears
2. Click **Start Break**, then click **OK**



**End a break.**

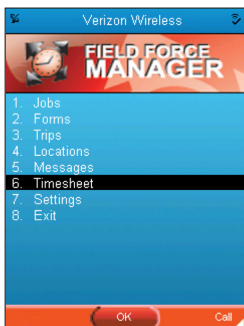
1. Click **End Break** when you're ready to end your break, then click **OK**



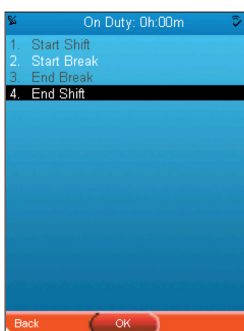
2. Click **Back** to return to the mobile app's main menu where you can choose your next job or activity

**End a shift.**

1. Access the mobile app's main menu and click **Timesheet**, then click **OK**. The Timesheet menu appears



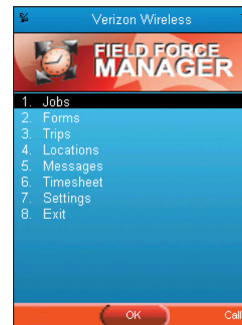
2. Click **End Shift**, then click **OK**



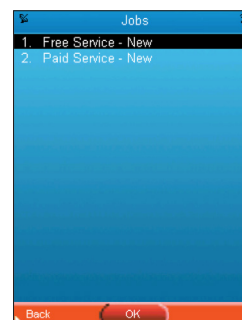
3. Click **Back** to return to the mobile app's main menu and **Exit** to leave the mobile app

**Mobile jobs****View and start a job.**

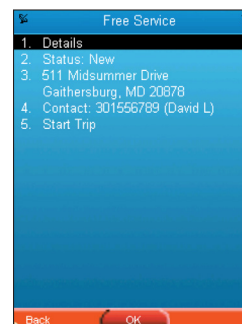
1. Access the mobile app's main menu, click **Jobs**, then click **OK**



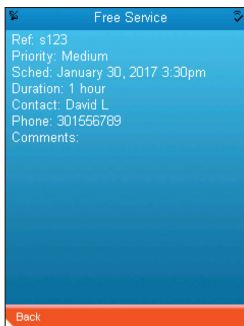
2. The Jobs menu appears and displays a list of your jobs. To view and start a particular job, click the job and click **OK**



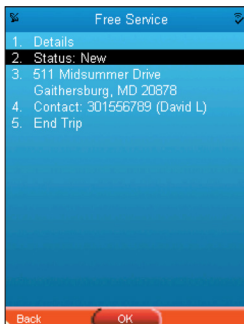
3. The Job Summary menu appears. Click **Job Details** to get additional information about the job



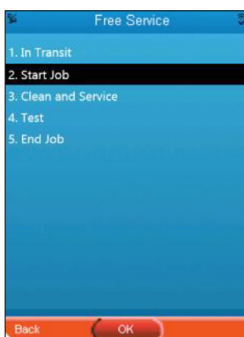
- The Job Details menu appears with information about the job, such as priority and duration



- When you're ready to start the job, click **Back** to return to the Job Summary menu. Click **Status** to go to the Job Status menu



- The Job Status menu appears. Click **Start Job** to begin the job



### End a job.

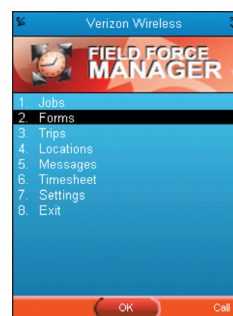
- To end a job, click **Back** to return to the Job Status screen
- Click **End Job** and then select **OK**

**Note:** Depending on the type of job you've been assigned, there may be additional tasks, such as forms to complete. When you have completed these tasks, click **Back** until you arrive at the Job Status menu.

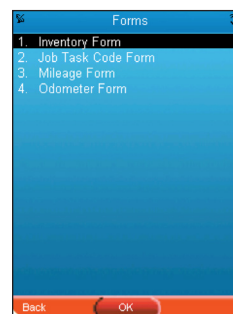
### Mobile forms

#### Complete a mobile form.

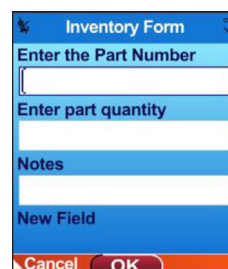
- Access the mobile app's main menu, click **Forms**, then click **OK**



- The Forms menu appears. Click the form you need to complete from the dropdown menu



- The selected form appears. Enter your data in the form



- Click **OK** to send the information to your office
- Click **Back** to return to the mobile app's main menu

## Trip forms

### Start a trip.

1. Enter the Start Odometer value
2. Check the box for “Auto-fill with last end odometer” to fill in your last odometer value
3. Select **Category**
4. Select **Purpose**
5. Select a job to link to your current trip, if applicable
6. Enter notes related to your trip
7. Tap **Start**

### End a trip.

1. Enter the End Odometer value. The odometer value will be calculated by your Start and End Odometer entries
2. Enter Additional Expenses, if applicable
3. Enter trip-related notes
4. Tap **End**

## Learn more:

If you need more help, don't hesitate to contact your Verizon Wireless business specialist today, or call us at 866.822.9565