

## 1 Web Portal Best Practices

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Web Portal best practices for common issues and its quick resolution on the Field Force Manager account.

### What's in it for me:

This cheat sheet provides you with best practices for quick resolution on issues and errors with Timesheets, Jobs and Forms.

### TimeSheets:

#### Delete/Remove a Shift for a worker

On Field Force Manager account, you cannot delete a shift of a worker. Rather Edit the Shift for given date and reduce the shift duration for least applicable time. Same steps followed for the Break Punches.

**Ex:** If the Shift has been Started at 10:00 AM and Ended at 05:00 PM, then edit the shift and change the Shift End to 10:05 AM.

### Jobs/Forms:

#### Submitting a Completed Job or Form

The mobile workers should perform 'Server Sync' after completing a Job or submitting a Form on the Field Force Manager Mobile Application.

- This will make the Form and Job data transfer to the web portal immediately.
- It improves tracking consistency.
- It prevents data loss and data transmission errors.

**Note:** Always do a Server Sync before performing a clear activation or clear record store on the mobile application.

#### Create/Uploading Unassigned Jobs:

Please select the Time Zone of the workers while creating jobs from web portal or uploading using spreadsheet. If Time Zone is selected then the default 'Time Zone' is set to American Samoa.

- Web Users can change the Time Zone by editing the Job information from Job List.
- Web Users can select the Time Zone in Steps 4 (**Schedule and Assign**) while creating the job from web portal.
- Web Users can enter the Time Zone information in the Spreadsheet under '**Column F**' before uploading the SpreadSheet.

**Preventing Browser and Web Portal issues:**

The Web users such as Super Users, Company Administrators and Web service users should clear the browser history, cache and cookies at least once in 2 weeks.

- It makes the Field Force Manager web portal work faster.
- It avoids Timeout errors while running reports on the account.
- It prevents issues while creating forms, jobs, alerts and reports on the account.
- Follow the URL for the steps to clear browser history, cache and cookies:
  - URL: <http://www.wikihow.com/Clear-Your-Browser's-Cache>

If the issue persists please contact our 24\*7 Customer Support team:

**Support Line:** 877.477.4899

**Support Email:** [ffmsupport@feildforcemanager.com](mailto:ffmsupport@feildforcemanager.com)