

Groups

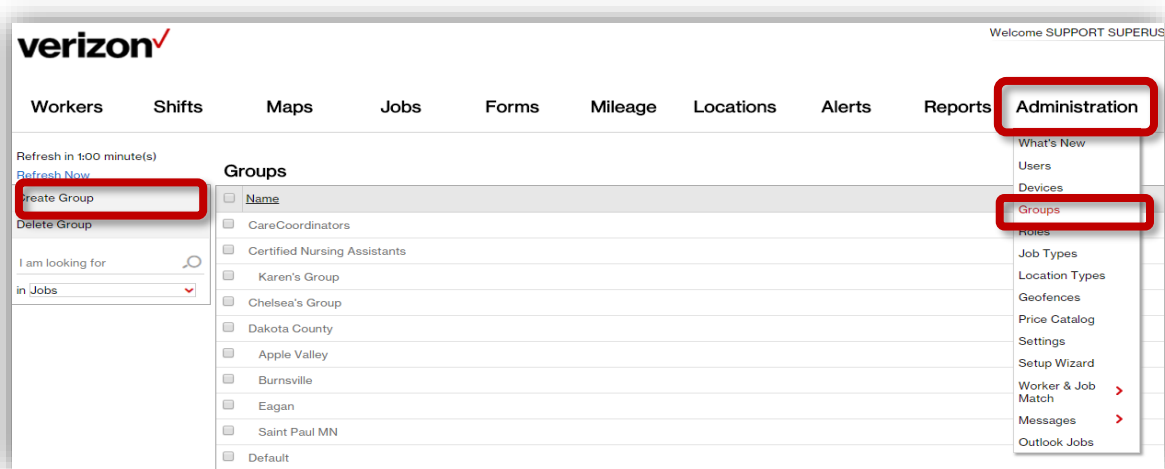
Groups are used to organize your mobile workers based upon your company divisions, markets, and territories. Groups will allow a web application user to filter and organize workers into various groups that have been created in Field Force Manager.

What's in it for me:

Understand how to set up Groups and Parent Groups for your mobile worker's in Field Force Manager. You will also learn how to edit and delete groups.

Accessing the Groups

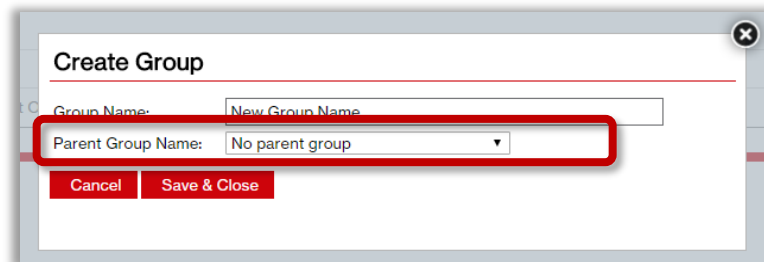
To access the "Groups" tabs. Navigate to the "Administration" tab on the top of the web page > "Groups" from the dropdown menu. Then Select "Create Group" on the left-hand side tool bar.



Creating a new Group:

Select the "Groups" button from under the Administration tab. This brings you to the "Groups" page that has a list of all the groups that have been created in Field Force Manager. Next click on the Create Group button from the toolbar on the left side found on the Groups page.

Then the "Create Group" window will appear.

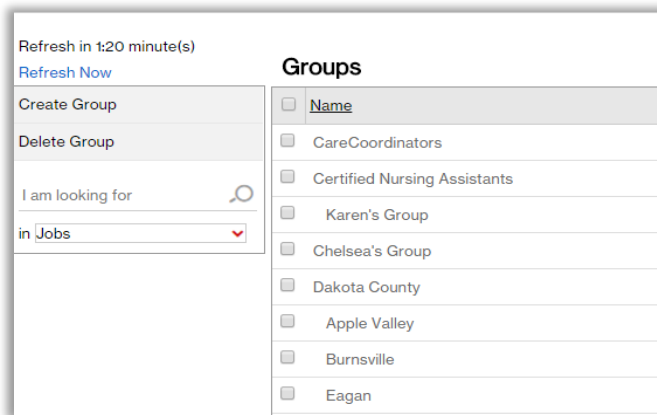


Creating Groups and Parent Groups:

When creating, or editing a Group, a parent level can be specified. When a “Parent Group” is selected, the new group will be listed under the parent group. This allows web users to create visual levels within their Groups, displaying Group “tree” structures. This also helps when selecting filters for various features within the web application.

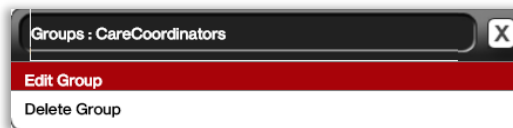
- Fill-in the group name.
- Select the “Parent Group” Name from the drop-down menu (Select No parent group if none is wanted).
- Click the ‘**Save & Close**’ button.

The New Group has been created. You can now see the new group on the list of groups on the “**Groups**” page.

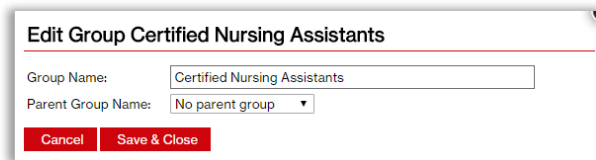


Edit an existing group:

- Select the Groups button from under the Administration tab.
- Click on the group you would like to edit from the “Groups” list page. The Options Menu will appear.



- Click the Edit Group button. An Edit Group window will open.



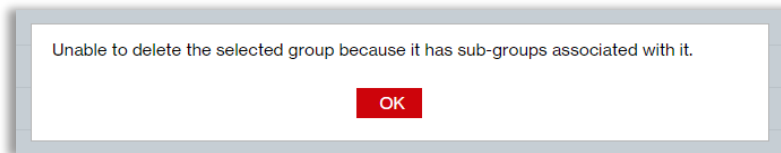
- Modify the name and/or parent Group.
- Click the Save & Close button to save the changes.

Delete an existing group:

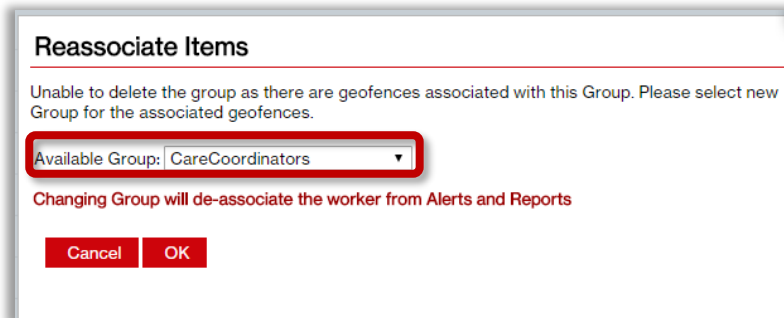
- Click on the group you would like to delete from the Groups page.



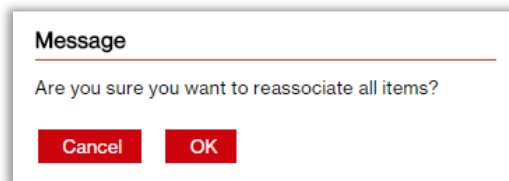
- Click the Delete Groups button.
If the Group is a Parent Group and has sub groups associated with it, you will not be able to delete that group. You will get this message:



- For deleting non-Parent groups, a "Re-associate Items" popup window will appear telling if you if any collections (users, geofences, forms, or jobs) are associated with the group. You then can re-associate a different Available Group from the drop-down menu.



- Select an available group from drop down menu to re-associate the collections.
- Click OK to dissociate items form the group and then delete the group.



- The group has now been deleted