

FFM

GETTING STARTED WITH FIELD FORCE MANAGER

Thank you for choosing Field Force Manager. You will use the Field Force Manager Web Management Application to monitor and manage your mobile workers. They will use the Field Force Manager App, which is installed on their mobile device, to report and receive data about their work day.

Getting Started Checklist

To get off to a successful start, please follow the steps in this checklist in the order given.

- 1. Read your Welcome email**
Within 24 to 48 hours after subscribing to Field Force Manager, you'll receive a Welcome email message with important information about your account.
- 2. Read the Wizards Overview**
The overview provides instructions for using the Registration and Setup Wizards to help you set up your web application. Read the Wizards Overview (look for Getting Started in smart.clicksoftware.com/ffm-support).
- 3. Use the Wizards**
The wizards help you register with Field Force Manager and configure the web application correctly. (The entire process takes about 15 minutes.)
- 4. Plan your deployment**
If you are purchasing new mobile devices, we recommend configuring them at your office. If you are adding the FFM Mobile App to your workers' existing phones, we recommend scheduling a time for them to bring their mobile devices to your office so that you can configure them. Allow approximately 5 minutes for each device—at least to start with—and preview setup instructions for specific models on the Devices page at smart.clicksoftware.com/ffm-support.
- 5. Configure mobile device GPS location settings**
Before you download the mobile app to mobile workers' devices, you need to configure the GPS location setting for each device. (Steps vary by device; please refer to the Devices page at smart.clicksoftware.com/ffm-support for device-specific instructions.)
- 6. Download and test the Xora Mobile App**
Download the mobile app and test all devices by reviewing 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. (FFM Mobile App download steps vary by device; please refer to the Devices page at smart.clicksoftware.com/ffm-support for device-specific instructions.)
- 7. Get training**
Every customer has the ability to attend live training sessions for their web application users. And, you can find additional training materials for your mobile employees at smart.clicksoftware.com/ffm-support.
- 8. Need assistance**
You can reach the Field Force Manager Customer Support team 24/7 by email at ffmsupport@fieldforcemanager.com or at the phone number provided in your Welcome email.