FIELD FORCE MANAGER WIZARDS OVERVIEW

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This overview guides you through the Registration and Setup Wizards. The Registration Wizard helps you register your account with Field Force Manager and provides us with the information we need to support you. The Setup Wizard helps you configure the FFM Web Management Application correctly. Completing both wizards should take less than 20 minutes total. You start the process with the Registration Wizard.

Completing the Registration Wizard

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

1. Click the link provided in the welcome email message to access the web application. After you enter your account ID, user name, and password, you will be prompted to start the Registration Wizard.

2. Select the carrier you are using, and click **Next**.

3. Complete "Your Objectives and Challenges" to provide information we need to better support you, and click **Next**.

4. Complete "Your Deployment Plan" to provide information we need to understand the size and timing of your FFM deployment, and click **Next**.

5. Complete "Your Contact Information," and click **Next**.

   NOTE: In the "Primary Mobile Phone Number" field, please enter the number of the person who ordered the FFM service. This person is the main contact for your account. Then enter the name, email, and phone number of the person managing the FFM deployment. (This may be the same person.)

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6. Enter the name and contact information of your Verizon Wireless sales representative, if you know it, and click **Next**.

   NOTE: This information is optional. Click Next to continue if you do not wish to enter the information.

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

   You will return to the Registration screen, where you will log in and proceed to the Setup Wizard.

Completing the Setup Wizard

1. The first screen of the wizard lists the setup operations you will perform; after reading it, click **Next** to begin the setup process.

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

   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 that all information is accurate.

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

4. 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 is important for all settings information to be correct. If you have any questions, please contact the FFM Customer Support team 24/7 by email at ffmsupport@fieldforcemanager.com or at the phone number provided in your Welcome email.

   › **Hours of Operation** – Best practice is to track workers' activity only during your company's scheduled hours of operation, to preserve their privacy.

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› **Auto Application Startup** – Best practice is to enable this feature to ensure that the mobile application starts when users turn on their devices. Please note that a user's device must support SMS messaging and that SMS messaging must be active to support this feature.

NOTE: SMS messaging support is not necessary with Android and iOS devices.

› **Auto Application Shutdown** – In a typical deployment, this feature is enabled so employees do not have to remember to exit the mobile app at the end of their shift. If your mobile users incur work hours beyond the Hours of Operation you just set, 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—and 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 the device is powered on.

NOTE: Auto-Launch to Background is typically enabled when workers are not 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 a more frequent worker location reporting. We do not recommend this setting if workers are not able to charge their mobile devices during the work day, 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** – Because it helps preserve the strength of the battery, we recommend that you enable this setting if workers are not able to charge their devices during the work day.

*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 on the smart.clicksoftware.com/ffm-support website on the **Documents** page.*

5. 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.

6. Confirm the default settings, and click **Next**.

Best practice is to confirm these settings, because they provide information that is helpful in managing your workers.

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

We recommend that you attend the training sessions outlined in your Welcome email message, as well as visiting smart.clicksoftware.com/ffm-support to familiarize yourself with the different training materials that are available to you.

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