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Preface

Field Force Manager Packages

Field Force Manager is a powerful web-based application combined with a handset application that provides visibility and control for all of your mobile workers. This user guide will teach you the principles and procedures needed to use the Field Force Manager application.

Your organization has the option to choose between three Field Force Manager packages that let you take advantage of the features that are right for your company. The three packages in Field Force Manager include:

- **Limited**: allows you to see and report on where your workers are as they conduct mobile work in the field.
- **Basic**: allows you see and report on where your workers are as they conduct mobile work in the field, use mobile timecards, simple job dispatch, text driving directions, forms and Messaging.
- **Premium**: takes mobile workforce management to the next level by adding on to Basic functionality job management features so you know when mobile workers are ready for their next assignment as well as audible/map enabled driving directions.

Some features in Field Force Manager will be activated only as part of the package your organization has selected. In all packages, Web Portals’ reporting functionality helps you monitor worker productivity, including time tracking, jobs, and more. Field Force Manager offers standard reports as well as the ability to export data in different formats. The chart below details which features are included as part of each package.

<table>
<thead>
<tr>
<th>Features</th>
<th>Field Force Manager Limited</th>
<th>Field Force Manager Basic</th>
<th>Field Force Manager Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fleet Maps</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Worker maps (Breadcrumb Trail)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Application Auto Start Up</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Company privacy management (Hours of Operation)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Set-up wizard</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Exception alerts (Speeding &amp; Stopping)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Geo-fencing</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Stop/Travel Reporting</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Location-aware timesheets</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Integrated</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
| Feature                                           | Field Force Manager | Consent to Use | Location Information
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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</tr>
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<tbody>
<tr>
<td>messaging</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Worker status indicator</td>
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<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Simplified data collection (custom forms)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Location Directory</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Worker/Fleet Timesheet Reporting</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Simplified job dispatch</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Turn-by-turn (TBT) driving directions</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Job scheduling &amp; dispatch</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enhanced navigation (audible TBT directions)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>POI and Address Entry</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Premium reports (Job Summary, Worker Productivity)</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Field Force Manager is solely intended for lawful business use. Consent to use of location information is required. Location information is not guaranteed to be accurate.
General Information

System Requirements

Mobile phone
- Verizon Wireless Field Force Manager compatible mobile phone. For listing of Field Force Manager mobile phones go to www.verizonwireless.com>Support>Features & Services>Data Services>Field Force Manager

Computer
- Field Force Manager is a web based application and requires connectivity to the Internet. High speed internet access is recommended. The following are requirements for accessing the Field Force Manager website:
  - Internet Explorer 6.0 or 7.0.
  - Minimum of 128 MB RAM.
  - Windows 98 or higher.
  - Processor: Pentium III 450 MHz or higher.

Privacy & Mobility
Verizon Wireless takes the matter of individual privacy very seriously. Each customer utilizing Field Force Manager must obtain the authorized consent of any individual affected by use of the service. Additionally, each individual has the ability to manage privacy settings by day of week and time of day to ensure that location information is collected, used, and transmitted only when approved by the user in possession of the mobile phone. Field Force Manager will only collect, use, and transmit information when the mobile phone is on and the Field Force Manager application has been launched. Since the application automatically launches each time the mobile phone is power-cycled or powered on, it is important that the user in possession of the mobile phone understand that the user must “EXIT” the application; otherwise, any location information will be sent to the customer as long as privacy management settings permit the collection of the data.

Driver Distraction
Field Force Manager takes the matter of driver distraction very seriously. Although Field Force Manager is designed for use in the field, it must not be used while operating a vehicle or when the vehicle is in motion. Field Force Manager users must follow the following guidelines.

MANDATORY SAFETY GUIDELINES

- When driving, always keep the phone charging and safely stored.
- Field Force Manager must not be used by the driver while the vehicle is in motion.
- Field Force Manager must be used outside of the vehicle, or while the vehicle is stationary.
Customer Support
Customer support is available through your web portal Support and Training links

Field Force Manager Application
- Links to Support and Training are located at the top right of the Field Force Manager Web Portal

Sales and Marketing
- Sales Phone # – (800) VZW-4BIZ
- Sales Inquiries – www.verizonwireless.com/b2c/businessSolutions/contactUs.jsp

Customer Support
- Customer Support Phone # – (800) 922-0204
- Customer e-learning – e-learning is available from the Training link via the Field Force Manager Web portal

Copyright Information
(c) 2007 Field Force Manager  All rights reserved. The Field Force Manager and Field Force Manager names and logos are trademarks of Verizon Wireless, Inc.
All other marks are property of their respective holders.
Mobile phone Installation & Initial Setup

1. Click on the “Menu” button.
2. Select “Get it Now”
3. Select “Get Going” / “Tools on the Go”
4. Select “Get New”, mobile phone will connect to the network
5. Select “Business / Tools”
6. Scroll to “Field Force Manager”, click on the “OK” button.
7. Select the option to “Download” the application
Launching Field Force Manager on Your Mobile Phone

Field Force Manager is an application that runs on your Verizon Wireless mobile phone.

To launch Field Force Manager on your mobile phone:
1. Press the "Menu" button.
2. Select “Get It Now”
3. Select “Get Going” / “Tools on the go” depending on mobile phone
4. Select “Field Force Manager”

NOTE: Field Force Manager will automatically launch upon the mobile phone powering up or if Auto Application launch is enabled through the Field Force Manager web portal’s Hours of Operation.

Program Mobile Phone Shortcut Key
1. Most mobile phones have user-programmable keys to provide the user with a shortcut to the “Get Going/Tools on the Go” menu, making it easier to launch Field Force Manager.
2. Consult your mobile phones user manual for the exact steps. Feature not available on all mobile phones.

Logging In
1. The 1st time you login, Field Force Manager will ask you for your “Phone Number”.
2. Enter the 10 digit mobile phone number (no spaces or dashes), then press the Ok button.
3. The 1st time you login, Field Force Manager will ask you for your PIN number.
4. Enter the PIN number for the user you would like to login, then press the Ok button. The PIN number is supplied to your administrator in their Getting Started Kit, sent via email.
5. Field Force Manager will now prompt you to accept the terms and conditions of use. Press the “Accept” button. As the user, you must accept the message to gain access to the application. This action is required only the first time you log in to the application.

6. The first time the application is used you will need to approve the location privacy settings. This is a required step to provide access to the mobile phones location information. The interface will automatically prompt you the first time the application attempts to utilize the location information.

7. To give the application access to the location information on the mobile phone you must approve the settings.
   a. Read agreement and press “Agree.” Recommended setting: “Always Allow,” “All Days,” and “All Hours” of the day.
   b. Modify to acceptable date and time to access.
   c. Press the “OK” button.
   d. Review summary of selections.
   e. Press the “OK” button.
   f. Review information regarding mobile phone settings.
   g. Press the “OK” button.
Getting started with location-based services

Verizon Wireless values your privacy. Because of this, your mobile phone is defaulted to only acquire your location when you dial “9-1-1.” To use location-based services (LBS) such as Field Force Manager, you must first enable location-based services on your mobile phone. Setup steps vary by mobile phone. Consult your mobile phone’s user manual for specific steps for your mobile phone.

1. Go to the main screen and press the “Menu” button.
2. Scroll to “Settings” and “Tools” and press the “OK” button.
3. Scroll down to “System” and press the “OK” button.
4. Select “Location” and choose “Location ON.”
The LBS status indicator to the left of your phone’s battery indicator should change from the “E911 Only” indicator to the “Location ON” indicator.

Once you have successfully logged into the Field Force Manager application, you will see the main menu. Press the Red Phone button to suspend the application.

Logging Out

To exit Field Force Manager:
1. Select the “Exit” option from the main menu.
2. Select the “Yes” option to confirm that you want to exit the application.

Navigation

Take a Phone Call
When someone calls you, Field Force Manager goes into Suspend mode automatically, so you can take your call as if Field Force Manager wasn’t even running.

Make a Phone call
To suspend Field Force Manager:
To make a call while you are using Field Force Manager, press the Red Phone button. This will temporarily suspend Field Force Manager while you place your call.
To return to Field Force Manager after your call:
1. Press the “Menu” button.
2. Select “Get It Now”.
3. Select “Get Going / Tools on the Go”.
4. Select “Field Force Manager”

Note: While on a voice call, Field Force Manager will not collect or send GPS points.
Field Force Manager Customer Web Portal Website

Logging In

1. Open an Internet Explorer Web Browser.

2. Navigate to https://www.verizonwireless.com/fieldforcemanager

3. Using your Field Force Manager login credentials, enter your username password and company id. Note: Login information is provided to the main point of contact for your company in the Web Portal Information spreadsheet that was emailed when your company was first set up by Field Force Manager.

   USERNAME:
   PASSWORD:
   COMPANY ID:

4. Click the Login Button

5. The system will then complete the login process.
First Time Setup Wizard
The first web user for an account to login will be presented with the option to perform the first time setup wizard. The setup wizard helps configure the account to take advantage of some of the most popular features.

Profile
This step allows the web user to make sure their web profile is setup correctly. The user can set their name, time zone, email address and request that alerts be sent to their email address.

Users
This step allows the web user to update the name and time zone for each of their mobile workers. Typically on first time login the names of the workers are set to their mobile phone numbers. This allows the web user to rename the workers to the proper name of the worker or their vehicle. This information can also be configured on the web users Users tab.

Settings
This step allows the user to configure the days and time when they want the application to track the user. The user can turn on Auto Application Start Up, set the start and stop time for GPS collection and choose the days/times (Hours of Operation) on which the application should start up and track the user and whether the application should shut down at the end of the hours of operation.

Alerts
This step allows a user to setup three commonly used alerts. The speeding alert, the long stop alert and the Prohibited stop alert. The alerts can be modified after the initial installation on the web users Alerts tab.
Field Force Manager Web Portal Interface
This section gives a general overview of the Web Portal interface and navigation.

Tabs
There are eight major tabs in Web Portal - Workers, Maps, Jobs, Locations, Messages, Reports, Alerts and Administration. The tabs available are determined by the Field Force Manager package your organization has purchased.

Refresh
The Web portal displays the most recent information upon request. Even when you are not interacting with the Web portal, it will automatically “refresh” every 15 minutes to show you the most recent information on the Field Force Manager server. (Note: The 15-minute time frame is a default setting that can be changed in the Administration Console.) The Web portal also displays a countdown clock so you will know how many minutes remain until the next refresh. If you want to get more recent information without waiting for the automatic refresh, click the “Refresh Now” link to display the most recent field data from the Field Force Manager system.
Map Tab

Maps Navigation
The Maps tab gives you a map view of where your mobile workers are currently located, and also shows the location of all Jobs and Locations for your company. The map will automatically zoom in to show the filtered data. Follow the items below to navigate around this map and all other maps in Web Portal.

Zoom Toolbar
The zoom toolbar is displayed above the map. Use the zoom toolbar to zoom in and out for an overall view.

- **To zoom in**, click on the squares to the left of the + icon.
- **To zoom out**, click on the squares to the right of the – icon.

Note: The distance each square represents is displayed when you hold your mouse over the square.

Back and Forward arrows
To navigate between different maps you have already viewed use the back and forward arrows to the right of the Zoom Toolbar. Note: Using these buttons are much faster than using the browser buttons.

Refit Map to Data
This is a helpful tool to see all of your data, after zooming in on a particular area. Click on this icon to zoom out and redraw the map so that all jobs and workers are displayed on the map.
On Click: Re-center & Zoom
Click on the Re-center Icon, then use your mouse to click anywhere on the map to re-center the map image. Click on the Zoom Icon, anywhere you click on the map will then zoom-in to that point.

Compass Directions
Click on any of the compass directions (North, East, South, West) to move the map’s display in that direction.

Drag and Drop Zooming
The fastest way to zoom in to a specific area is to use Drag and Drop Zooming.
1. Left Click and HOLD with your mouse on the map
2. While HOLDING the left click button down, drag a rectangular shape.
3. To zoom into the shape you drew, left click on the shape.
4. To clear the shape without zooming in, left click in an area of the map that is not covered by the shape.
Filtering, Sorting, and Searching

Filter
The Filter function allows you to view specific data on maps and reports.

Date/Time Filter
The Date/Time filter is used to view data on maps and reports for a specified date/time.

1. In the Tool bar on the left hand side of Field Force Manager, find the Date/Time filter.

2. Click on the Set Date Filter button to bring up the filter selection.

3. In Field Force Manager there are two types of date/time filters:
   a. Relative: specifies a relative time frame from the current date. I.e., “Today” would always display today’s information each time you login to Web Portal by adjusting the date to the current data and time.
b. Fixed: allows a user to specify a specific timeframe and duration in the past or future. This mode is typically used for researching a specific time frame.

4. Select the appropriate date/time settings, and select the **OK** button.

**Note:** Field Force Manager Web Portal will remember your last date and time filter setting the next time you log into Web portal. Ensure the date and time filter is set to the date and time range you would like to search for before you view information.

**Work Groups Filter**

The Work Groups Filter will allow a user to view data in Web Portal for the group(s) selected. Additional work groups can be added through the web portal administration tab.

1. On the left side within the Toolbar of Field Force Manager, find the Work Groups filter.
2. Check or uncheck the appropriate boxes next to the divisions/groups to view specific data for the work groups selected.

3. Click the **SAVE** button to make your selection.

**Note**: Field Force Manager Web Portal will remember your last work group filter setting the next time you log into Web portal. Ensure the work group filter is set to the date and time range you would like to search for before you view information.

**Display Filter**

On the maps, workers or locations tab, the Display filter will be displayed in the toolbar “Display Filter” of Web Portal. This will allow a Web Portal user to view a subset of data based on the filtered settings.

1. Click on the **Display Filter** button and the worker status/symbology filter will be displayed.

2. Check or uncheck the appropriate checkboxes and press the **OK** button. Or **cancel** to make no changes.
**Note:** Field Force Manager Web Portal will remember your last display filter setting the next time you log into Web portal. Ensure the display filter is set to the date and time range you would like to search for before you view information.

**Sort**

Within each tab of Web Portal a user can sort the data by the column headers displayed.

For example, if a user wants to display the workers in ascending order by workers name they would do the following:

1. Select the **Workers** tab.
2. Click on the Name column header.

A downward arrow will appear next to the column name when the user is sorting in ascending order.

An upward arrow will appear next to the column name when the user is sorting in **descending** order.

**Search**

Use the following procedure to find a specific worker or location.

1. In the Search field enter the search criteria.
2. Select the item from the pull-down menu.

3. Select the **Search** button. The search results will appear in the search window.
Workers Tab

The workers tab is used to monitor your mobile workforce. All of the information on this screen is displayed as soon as the application uploads the information. From this tab, you can see whether or not a worker is in cellular and/or GPS coverage, the workers name, which group they belong to, their last known communication status and their last known location date and time. When navigating in the workers tab ensure your filters are set correctly to view the information you are looking for.

Connection Status

The Connection Status is displayed with two colored circles. The first circle signifies the Connect status of that worker.

The Icon for Communication status is on the left:

- Green indicates that the mobile phone has communicated in the last 2 hours.
- Yellow equals no recent communication from the mobile phone for over 2 hrs.
- Red indicates the worker has logged off.
GPS status Icon is to the right of the communication status icon.

- Green indicates the last GPS received was valid.
- Yellow indicates that no GPS information has been received for over two (2) hours or that the last GPS received was not able to determine location due to being out of GPS coverage.

### Name

The name column displays the name of the worker, for an in-depth view of a specific worker; you can click on that worker’s name. This will bring you into that specific worker’s details. Here you can view the worker activity log, locations, jobs, worker details and that specific workers map.

### Status

The status column shows the last known status of each worker. Listed below are the types of statuses displayed in this column:

- **Logged in:** Logged into Field Force Manager and the worker is being tracked. At this time the worker is not using timesheets.

- **Logged Off:** The worker has logged off by exiting the application from the application main menu. This signifies the worker the application is off and the worker is no longer being tracked.

### Location

The last two columns display the last known location of the worker, and the date and time the GPS point was gathered. Until Field Force Manager receives an updated GPS point, it assumes that the worker has not moved from a specific location. In the event the worker is stopped at a location or a job, the location or job where they last stopped will be listed. If your worker is listed at an “Unknown” location, it means the worker has visited a site that is not yet created as a location or job within the Web portal.

<table>
<thead>
<tr>
<th>Last Location</th>
<th>Location as of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveling: 0:19 hrs 13518 beach day rd taylor, michigan 48180</td>
<td>11/21/05 09:33 AM CST</td>
</tr>
<tr>
<td>Stopped: 0:06 hrs Location: Unknown 5175 lake st 23 (columbus Ohio) Delaware, ohio 43015</td>
<td>11/15/05 01:42 PM CST</td>
</tr>
<tr>
<td>Stopped: 0:12 hrs Location: Unknown 53 main st maumee 44071</td>
<td>11/15/05 10:23 PM CST</td>
</tr>
<tr>
<td>Stopped: 0:26 hrs Location: Unknown 3777 state hwy 55 (new glaze rd) MICHIGAN 48003</td>
<td>11/15/05 05:02 PM CST</td>
</tr>
</tbody>
</table>
Workers Map
If you would like to see a map of where your workers are currently, click the Workers tab and then the Worker Map button in the toolbar of the Web Portal. From the map, you can set the following filters: Locations, Jobs, and the Worker filter, to see only the data that is important to you. All of the map controls work the same throughout Web Portal. To get back to your list of Workers, click the Worker List button, or click on the Workers tab.

Activity Log
In the Workers tab, if you click on the worker name you will be taken to the Worker Activity log here you can view all of the actions that worker has performed within the date and time range which you have set using your Date/Time filter. A "perfect day" using the Field Force Manager software will show you a Login, and Exit of Field Force Manager. There is also an Activity filter which allows you to specify which actions you would like to view such as Log in/Log out, GPS errors.

Worker Details
In the Workers tab, if you select a specific workers name you will see the Worker Detail button. This will display any information that has been entered about this specific worker. It will display their name, which group they belong to, their last known location the date/time it was received and their hours of operation.

Worker Map
In the Workers tab, if you select a specific workers name you will see the Worker Map button. This will display the last known location of this specific worker. You can also view the bread-crumb trail of where this worker traveled throughout the specified date and times you set in the Date/Time filter. By holding your mouse over the red dots, you can see the date and time that GPS point was collected, and if enough information was collected, it will also show you the worker’s direction and speed.
Auto Application Start Up
If a worker has not logged into their application and their phone is on, the web user can press the remote start button to start the application on the mobile phone. The mobile phone will be sent an SMS message that will start the application.

Worker Daily Timesheet Report
The Worker Daily Timesheet report is created based upon your Date/Time filter; however, since this is a daily report, it will only create the report based upon the first day specified in your filter. This report will show you a break-down of that worker’s day by stop. It displays number of stops, travel distance, travel time, and total time at stops. This can help when dispatching workers to jobs throughout the day.
Locations Tab

The locations tab is used to maintain locations or customers for your company. For example, this can be vendor sites, worker’s homes, or any other location a worker might frequently stop.

Creating a Location

1. Select the Locations tab
2. Click the Create button. A create location window will appear.
3. Select the type of location you are creating from the Type drop-down box.
4. Enter the name and address of the location. That is the minimum amount of information required to create a location.
5. Click the Create button at the bottom the window to create the location.
6. To view any of your locations on the map select the location(s) and click the Map button.
7. To view the details of your locations select the hyperlink associated with that location name in the location list.

Editing a Location

1. Select the Locations tab.
2. Click the checkbox to the left of the location you would like to edit (you can only edit one location at a time).
3. Select the Edit button, An Edit Location window will appear.
4. Make the desired changes and click the save button at the bottom of the window.
Deleting a Location

1. Select the **Locations** tab.

2. Select the checkbox to the left of the location(s) you would like to delete.

3. Select the **Delete** button.

4. A confirmation window will appear to confirm that you wish to delete the selected locations. Click **OK** to delete the location(s).
Geo-tuning a location

Geo-tuning is used to tune the latitude and longitude of a location or job.

To Geo-tune a Location

1. Mouse over Location
2. Select “Geo-Tune” from mouse over menu
3. The mouse cursor will turn into a target
4. Click on the map where you would like to move the Location or Job to.

Upload Locations

1. Select the Upload Locations button
2. Select the “Get Template” button to download location upload template
3. Unzip XLS, CSV and txt file to local computer
4. Enter Locations into XLS or CSV file, Save the file
5. Select the “Browse” button
   a. Select the file with data to be uploaded
6. Check Update Records box if you want to update records if they’re the same
7. Select the “Submit” button.

The following information is available to be uploaded for a location:
- Name (Required)
- Street Address (Required)
- City
- State
- Zip
- Country
- Latitude
- Longitude
- Contact Name
- Contact Phone
- Location Type (Required to match existing Location Type)
Display Filter
On the maps, workers, and locations tabs the display filter is available within the toolbar. Note: The settings configured in the Location Filter will affect the Location Stop Report.

1. Click on the **Display Filter** button and the Location types will be displayed.

2. Check or uncheck the appropriate Location Types checkboxes and press the OK button. Or click cancel to make no changes.
Note: Field Force Manager Web Portal will remember your last display filter setting the next time you log into Web portal. Ensure the display filter is set to the date and time range you would like to search for before you view information.

Reports

The “Reports” tab provides instant access to a variety of online reports. Reports are also available from the “Workers,” and “Locations” tabs. All of the reports listed below can be exported to PDF or Excel® formats. The information generated in these reports will be based on the "Date/Time” filter that you have set.

To send Field Force Manager data to another file:

1. Click on the name of the report you would like to see.
2. Choose the type of report to generate (PDF, Text Excel, Web)
1. Click the OK button
2. The report will appear in an expanded window.
Alert Report
The alert report displays all of the alerts that fired for a company for all workers in the current group and date/time filter. The report displays the Name of the user who fired the alert, group, alert type, alert description, the alert message as well as the date / time the alert was fired.

Fleet Daily Timesheet
The Fleet Daily Timesheet report will display an overview of how each worker’s time was spent throughout the day. It will show what time each worker started their day, how many stops they made, mileage that was driven each day, how many hours the worker logged, and what time each worker ended their day.

Fleet Trip Report
The Fleet Trip report will display each worker and the percentage of time spent traveling and the percentage of time spent stopped. Under the Stop Information header, it displays the number of stops, the total time stopped, and the average time at each stop. Under the Travel Information header, it displays total time traveling, the average time traveling to each stop, the total distance driven, and the average distance between each stop.

Location Stop Report
The Location Stop Report displays each workers number of stops, the duration at each stop and the travel time and mileage between stops that day. It also lists the address of each stop, so you can see if they have stopped at a prohibited location or an unknown location.

Worker Activity Log Report
The worker activity log report displays all of the activities found in the worker activity log for all workers in the current group and date-time filter. The report has now been modified to include the location information/address for each activity.

Worker Timesheet / Stop Report
The worker timesheet / stop report modifies the existing “Worker Daily Timesheet” report and allows the user to run the report for multiple workers across multiple days. The report will display the “Worker Daily Timesheet” report for all workers in the current group filter and will display the stops and payroll information for the date/time range for each worker based upon the date/time filter
Administration

The Administration pages allow you to configure and set up many aspects of the Field Force Manager application.

Users List
The users tab will display a list of all of the users that are set up for you account.

Creating a new user
The Create User interface allows you to add users to your system.

1. Select the **Users** tab.
2. Click the **Create User** button, a create user window will appear.
3. Enter the user’s first and last name, which group you would like that user to belong to, which Security Group you would like that user to belong to, the time zone, and a username and password (these are all required fields).
Edit an Existing User
1. Select the Users tab.
2. Click the checkbox to the left of the user you would like to edit.
3. Click the Edit User button, an Edit User window will appear.
4. Make the necessary field changes.
5. Click Save.

Delete an Existing User
1. Select the Users tab.
2. Click the checkbox to the left of the user you would like to delete.
3. Click the Delete User button, A confirmation window will appear asking if you are sure you would like to delete the selected user.
4. Select Ok.
Upload Users

1. Select Upload Users button

2. Select the "Get Template" button to download user upload template
3. Unzip XLS, CSV and txt file to local computer
4. Enter Users into XLS or CSV file, Save the file
5. Select the "Browse" button
   a. Select the file with data to be uploaded
6. Check Update Records box if you want to update records if they’re the same
7. Select the “Submit” button.

User:
- First Name (Required)
- Middle Name
- Last Name (Required)
- Preferred Name
- Group (Required, must be valid Group Name)
- Security Role (Required, must be valid Security Role)
- Time Zone (Required, must be valid Time Zone)
- Pin (Required, must be 4 – 10 unique number for the company)
- Username (Required, must be unique for the company)
- Password (Required)
- Street Address
- Apt_Suite
- City
- State
- Zip
- Country
Devices

The “Devices” tab displays a list of all of the devices that are configured within your Web portal account during setup. To add new devices to your system, contact your Verizon Wireless sales representative to purchase additional licenses.

Editing an existing device

1. Select the Devices tab.

2. Click the checkbox to the left of the device you would like to edit.

3. Click the Edit Device button, an Edit Device window will appear.

   ![Edit Device]

4. Make the necessary field changes and then click Save.

Deactivate an existing device

You only need to deactivate and reactivate a device when you lose your phone device and need to put Field Force Manager on another device.

1. Select the Devices tab.

2. Click the checkbox to the left of the device that you would like to deactivate.

3. Click the Deactivate Device button.

   ![Deactivate Device]

4. A confirmation window will appear asking if you are sure you would like to deactivate the selected device. Click Yes.

Note: Deleting a user or deactivating the device from the Web portal will not deactivate the service. You will still be charged monthly access for that user. To cancel service, please contact Verizon Wireless Customer Service at 1.800.922.0204.
Groups

Groups are used to organize your mobile workers based upon your company divisions, markets, and territories. Groups will allow a Web Portal user to filter and organize workers and jobs. For example, if your company has a division in Minneapolis and a division in Boston, these two divisions would be considered two groups in Web Portal.

Create a new group

1. Select the Groups Tab.
2. Click the Create Group button, a Create Group window will appear.
3. Enter the group name.
4. Click the OK button.

Edit an Existing Group

1. Select the Groups Tab.
2. Click the checkbox to the left of the group you would like to edit.
3. Click the Edit Group button, Edit Group window will appear.
4. Modify the name.
5. Click the OK button.
Delete an existing group

1. Click the checkbox to the left of the group you would like to delete.

1. Click the **Delete Groups** button.

2. A confirmation window will appear asking if you are sure you would like to delete the selected group. Select the **OK** button.
Location Types
The Location Types tab will allow you to customize and configure the location types and icons for your company.

Create a new Location Type
1. Select the **Locations Type** tab.
2. Click the **Create Location Type** button, a Create Location Type window will appear.
3. Enter the Location Type name. If this is a “Prohibited” Location check the Prohibited checkbox.
4. Select an image by clicking the left and right arrows.
5. Click **Save** or **New** to create another Location Type.

Edit an existing Location Type
1. Select the **Location Type** Tab.
2. Select the checkbox to the left of the Location Type you would like to edit.
3. Click the **Edit Location Type** button. The Edit Location Type window will appear.
4. Modify the information and click **Save**.
Delete an existing Location Type

1. Click the Location Type Tab.

2. Click the checkbox to the left of the Location Type you would like to delete.

3. Click the Delete Location Types button. A Reassign Location Type window will appear prompting you to assign the locations within the selected Location Type to another Location Type. (If no locations are assigned to that location type you will only get the delete confirmation box)

4. Select the new Location Type to assign the locations to, Click OK.
**Alerts Tab**

An alert is an automated message to a user or a group that is triggered by a predetermined rule. For example a worker exceeding the speed limit or entering and leaving a location. Alerts are configurable and can contain one or more criteria-based rules. Alerts allow a company to proactively monitor and manage mobile workers by automating messages and making sure that those messages get to the right users. The first time setup wizard will pre-install a speeding, long stop and prohibited stops alerts in your account. These alerts can be modified by editing the alert from the alerts tab.

**Viewing an Alert**

1. To view and Alert that has been triggered select the **Alerts** Tab.

2. Select the button **View Alerts**, this will show you who triggered the alert and what alert was triggered.

3. Select the name, a new window will open which shows you the alert that was triggered and the date and time it occurred. Select cancel when done viewing.

**Deleting an Alert**

1. Select the **Alerts** Tab.

2. Check the checkbox to the left of the alert(s) you would like to delete.

3. Select the **Delete Fired Alert** button.

4. Click ok to confirm the deletion.
Creating Alerts

1. Select the “Alert” tab (this tab is only active for an administrator).
2. Select the "Create Alert" button, and a new window will appear.
3. Enter the name you want for the alert; for example, “Speeding.”
4. Give a description; for example, “Exceeding the speed limit of 65 mph.”
5. Check the “Active” box. If the box is blank, the alert will not be activated.
6. Select the Type of Alert you want to create

7. Click the Next button, A New Alert window will appear.

8. Select the New Rule button.

9. Select a data type to alert on. i.e. GPS.

10. Depending on the data type you select the field option below will change to either Data or Operators. Select one of the options from the pull down i.e. Speed.

11. Select a value, i.e. Greater then, select Apply Changes (repeat the steps to add more then one rule to an alert by selecting the new rule button again).

12. Select the Next button once you have added all the rules. A new Groups window will appear.

13. Select the group or individuals that this alert will apply to.

14. Select Next, a new schedule window will appear.

15. The schedule window allows you to set the time of days that the alert can be triggered. If left blank it will be 24 hours a day.

16. Select Next, a Recipient Window will appear.
17. The Recipient window is where you can select the data type in the alert so when the alert is triggered it will read [Workers username] was exceeding [GPS Speed].

18. Select the names on the right as to who is going to be informed when this alert is triggered.

**Editing Alerts**

1. Select the **Alerts** Tab.

2. Select the checkbox to the left of the Alert you would like to edit.

3. Click the **Edit Alert** button. A new alert window will open. Use the tabs to edit the parts of the Alert needing to be edited. These are the same windows used to create the alerts. The tabs link you to each of the steps.

4. Click on the tabs to edit the steps. When complete with the step you can click **Next** to review the other steps or **save** to exit.

**Deleting Alerts**

1. Select the **Alerts** Tab.

2. Select the checkbox to the left of the Alert you would like to delete.

3. Click the **Delete Alerts** button.
Geo-fences

The Web Portal provides a user with the ability to configure custom geographic regions. These geo-fences are used to alert a worker or a manager that a mobile worker is going in or out of an area. For example, a Web Portal user could create a geo-fence around an entire state or around a highway. To setup a geo-fence, first create a geo-fence and then create an alert to alert upon the geo-fence.

Creating a Geo-fence

1. Click on the Geo-fence tab under Administration in Web Portal.

2. Select the Create Geo-fence button.

3. The geo-fence configuration page will be displayed, enter a geo-fence name, description, and division.

4. Enter an address, city, state or zip. click the Find Address button. The system then presents the user with a map of the area, and allows the user to create a drag and drop circle (or a polygon) geo-fence.

5. To create a circular geo-fence, choose the circle icon and simply click and drag the radius that you desire for that geo-fence.
6. To create a defined polygon, choose the polygon icon and simply click on the map where you want the points to appear. Field Force Manager will automatically connect the points once there are three points. (You can also drag the points by clicking on them as well if you make a mistake).
**Settings**

**Hours of Operation**
A Web Portal administrator can configure the hours of operation for an entire company, a group, or a specific user. By default the mobile phone will collect GPS information 24/7 while the Field Force Manager application is running. If a worker remains logged into their mobile phone after the set Hours of Operation, the mobile phone will stop collecting GPS and communicating until the next day. If a user logs in, performs a timecard or job action, the mobile phone will resume GPS collection and communication until the next days “On” Hours of Operation or a set number of hours. Hours of operation are used to control GPS collection and Auto Application Start Up.
Company Settings

Auto Launch to Background
This preference if enabled will cause the application to automatically suspend after the application is started. The application will remain in the foreground for 3 seconds prior to moving to the background.

Auto Shutdown after Hours of Operation
This preference if enabled will cause the application to automatically exit at the end of a user's hours of operation. The application will end a shift for a user if they are currently on duty. This preference is not suggested if the user uses the application for Forms, Timesheets or Jobs.

Auto Application Startup
This preference if enabled will cause the server to send SMS message to start the application during a user's hours of operation. The SMS message will be sent if the mobile phone has not communicated with the server in an hour and five minutes.

Options Menu Code
This preference allows a company to set the access code that prevents access to the * 9 menu on the mobile phone. The default code is 4321.

Suppress Device Notifications
The preference if enabled will suppress all modal dialogs to the mobile worker. This will prevent the user from being notified of new or updated jobs, locations and messages.

Auto Application Start Up

Field Force Manager has the ability to remotely start the mobile application. Auto Application Start Up is designed to automatically keep the Field Force Manager application running during your company's defined hours of operation. The Field Force Manager application can also be started on demand using the Remote Start button on a Worker Map or the User Tab. Field Force Manager customers will not be charged for the Auto Application Start Up messages being sent to the mobile phone.

To enable Auto Application Start Up the company setting, “Auto Application Start Up” must be changed to True. The default setting for this preference is False. Next the Hours of Operation must be set. By setting up the Hours of Operation, the application will know when to automatically send a message to the mobile phone to turn on for the day. The server will also monitor the application throughout the day to ensure it remains on. The server will restart any mobile phone that has not communicated with the server in an hour and five minutes. If they have not, the application will send a message to restart the application and log the user back in. The mobile phone must be turned on for the application to be restarted.

Web users can also start up a user’s mobile phone on demand by going to a Worker Map or the User tab and checking the box next to a mobile worker and pressing the Remote Start button. Manually remote starting a mobile phone will ignore the workers hours of operation, start up the Field Force Manager application and start collecting GPS points.
Support and Training

**Support**
To get support on Field Force Manager, click on the Support link in the upper right hand corner of the web portal.

**Training**
To get training on Field Force Manager, click the training link in the upper right hand corner of the web portal.
**Glossary**

**Activity**
Events a mobile worker enters into a handheld mobile phone while logged into Field Force Manager. Activities include starting and ending shifts, starting and ending breaks, logging in and out of Field Force Manager, and completing ad-hoc forms. All activities are recorded on a worker’s “Activity” log.

**Breadcrumb Trail**
A visible collection of a worker's GPS points over a specific timeframe, represented by circular, blue icons on the map. In this way, you can track where your workers have been. Each point on the map will also give you information about how fast the worker was traveling at the time the point was collected.

**Filter**
A means of controlling what information is displayed in the Web Portal content frame. Specifying a date range in the date/time filter, for instance, instructs Web Portal to display only the information gathered during that timeframe. You can also filter out Group, Location, Worker and Activity information.

**Fleet**
A company’s collective group of mobile workers.

**Geo-code**
These are the map coordinates that Web Portal generates from an address. Map coordinates can be overridden.

**GPS point**
The location of a mobile worker at a specific date / time. GPS points are collected by the mobile phone and sent to the Field Force Manager Web portal.

**Group**
Worker subdivisions within your company set up by the company administrator. When a new user is created, he or she will be assigned a work group.

**Hyperlink**
Blue, underlined text that you may click on to be taken to more information about that subject.

**Location**
Known work or non-work sites that you can create and edit in Web Portal. By doing so, you can match worker stops to actual landmarks. By sending a location to your workers, you can provide them driving directions from their current position to that specific landmark.

**Location Type**
Categories of locations set up by company administrators to distinguish certain landmarks. Typical location types might include Company, Customer, General, Prohibited and Vendor.

**Maps**
Geographical images that provide a backdrop to show where workers and jobs are located.

**Device**
Any device or other hardware equipped with the Field Force Manager software. Devices are added to the Field Force Manager Web portal by Verizon Wireless as part of the setup process. You can edit the user description to more accurately describe who is using the device.

**Web Portal**
The web-based component of Field Force Manager that lets dispatchers and managers know where your workers are, when they’re ready for their next job and lets you dispatch them in the most efficient manner. It also lets you see reports of individual worker or all worker activity.

**Preferences**
Can be accessed from the blue hyperlink at the top of the Web Portal screen. Both Administration and Operations users may adjust User preferences, which will only apply to that user. Administrators may also change company preferences, which affect all users in the company.

**Prohibited**
A location that has been designated as a forbidden location for a worker to stop at during their shift.

**Report Tab**
On the Reports tab, you have the choice of viewing and exporting several different reports. These reports list information regarding hours worked, location stop times, timesheet actions, travel times, etc. These reports can be adjusted to display information over any timeframe you designate in your date/time filter.

**Settings Tab**
Located on the Administration site, this is where company administrators can set hours of operation and overtime/double overtime rules.

**User**
Any employee using Field Force Manager; users include mobile workers, administrators and dispatchers. Users are created and assigned a work group by company administrators.

**Web Portal**
The Web-based component of Field Force Manager. The Web portal allows dispatchers and managers to view worker locations and job status, so workers can be dispatched in the most efficient manner. The Web portal also provides individual worker reports, and lets you review all worker activity.

**Worker**
Any employees using the Field Force Manager software on their phones out in the field.
Appendix A – Quick Reference Card

Quick Reference Card for Field Force Manager Mobile Phone Users
Phone appearance and menus vary depending on model, package and settings.

Navigation & Buttons
Back or CLR button – previous screen
Ok button – will select the highlighted option from list
Up and down scroll buttons – scroll vertically through list
Numbers – navigate to an item by pressing its corresponding number
Red Phone button – temporarily suspends Field Force Manager

Launching Field Force Manager:
1. Turn mobile phone on.
2. The application will automatically launch and login.

Field Force Manager Menu

Functions
Starting and ending a shift – From the main menu.
1. Highlight Timesheets and press Select.
2. Highlight End Shift and press Select.

Starting and ending a break
2. When break is done highlight End Break and press Select.

Answering and making phone calls
1. To answer a call - Press the Ok button. Field Force Manager is automatically suspended. Resume Field Force Manager when you are done.
2. To make a call - Press the Red phone button to suspend Field Force Manager. Dial the number and press the GREEN phone button to place the call. Resume Field Force Manager when you are done.

To return to Field Force Manager after your call:
1. Press the Menu button.
2. Select Get It Now
3. Select **Get Going/Tools on the Go**
4. Select **Field Force Manager**

**Logging out of Field Force Manager**
From the Main Menu (MENU key) select EXIT and then Yes.

**Tips**
- Charging the battery – you should charge your phone every night from an electric charger. You can use a vehicle car charger or extended battery during the day.
- Turning the phone off and restarting the phone at least once a day is recommended.
- Mandatory Safety Guidelines – *never interact with Field Force Manager while driving. Park the vehicle before using.*
- You should start Field Force Manager when you begin your day and exit at the end of the day. Field Force Manager needs to be running on the mobile phone to receive job dispatches. Always return to Field Force Manager after talking on the phone or using other mobile phone screens. This function may be done automatically depending on your companies setting preferences.

**For Support**
- Call your manager or dispatcher.
Appendix B – Application Shortcuts

All Handsets

Server Sync
- From within Field Force Manager, click * # to sync your device with the server

Reset Field Force Manager data
- At Field Force Manager login, enter 9 zeros (000000000)
  - This will clear all Field Force Manager data on the device
  - If auto-login is enabled, Reject the warning screen to access the login screen

Reset Field Force Manager activation
- At Field Force Manager login, enter 9 threes (333333333)
  - This will clear all Field Force Manager data on the device as well as the device activation on
    the device and the server.
  - If auto-login is enabled, Reject the warning screen to access the login screen

Reset Logged in user
- At the Field Force Manager Main Menu, enter * 0
- A message will appear that at the next login the user will be prompted for a pin number, Press
  Ok.
- Log out
- Log back in, you will be prompted for a pin number

Motorola v325

Setting up Shortcut key
1. Select Menu
2. Goto to Settings & Tools
3. Select Phone Settings
4. Choose display

Set Location On
1. Select Menu
2. Goto to Settings & Tools
3. Select Phone Settings
4. Select Location
5. Choose Location On
6. Choose home screen
7. Choose home keys
8. Choose Down
8. Choose Get Going
9. Press Ok

Lock Location On

- Location On Cannot be locked

GZ One Type V

Set Location On

1. Select Menu
2. Go to Settings & Tools
3. Select Phone Settings
4. Select Location
5. Choose Location On

Lock Location On

1. Select Menu
2. Go to Settings & Tools
3. Select Phone Settings
4. Select Security
5. Enter Lock Code (see device user manual)
6. Choose Lock Mode
7. Choose Location
8. Choose Lock, Press Ok

Change Lock Code

1. Select Menu
2. Go to Settings & Tools
3. Select Phone Settings
4. Select Security
5. Enter Lock Code (see device user manual)
6. Choose Edit Code
7. Choose Enter New Code
8. Choose Enter New Code Again
9. Press Ok

Setup Call Restriction

Setup Lock

1. Select Menu
2. Go to Settings & Tools
3. Select Phone Settings
4. Select Security
5. Enter Lock Code (see device user manual)
6. Select Restrict Calls
7. Choose Code Enabled

**Lock Phone Calls**

1. Select Menu
2. Goto to Settings & Tools
3. Select Call Settings
4. Select Call Restrictions
5. Enter lock code (see device user manual)
6. Select Contacts Only & Data Calls

**GZ One Type S**

**Set Location On**

1. Select Menu
2. Goto to Settings & Tools
3. Select Phone Settings
4. Select Location
5. Choose Location On

**Lock Location On**

1. Select Menu
2. Goto to Settings & Tools
3. Select Phone Settings
4. Select Security
5. Enter Lock Code (see device user manual)
6. Choose Lock Mode
7. Choose Location
8. Choose Lock, Press Ok

**Change Lock Code**

1. Select Menu
2. Goto to Settings & Tools
3. Select Phone Settings
4. Select Security
5. Enter Lock Code (see device user manual)
6. Choose Edit Code
7. Choose Enter New Code
8. Choose Enter New Code Again
9. Press Ok

**Setup Call Restriction**

**Setup Lock**

1. Select Menu
2. Goto to Settings & Tools
3. Select Phone Settings
4. Select Security
5. Enter Lock Code (see device user manual)
6. Select Restrict Calls
7. Choose Code Enabled

**Lock Phone Calls**

1. Select Menu
2. Goto to Settings & Tools
3. Select Call Settings
4. Select Call Restrictions
5. Enter lock code (see device user manual)
6. Select Contacts Only & Data Calls
Appendix C - Phone Troubleshooting

Warning or Error Code reads:

**XXXXXXX is already activated by another device.**

- Login to the Web portal as an administrator.
- From the "Devices" tab, check the box to the left of the device you are trying to activate.
- Click "Deactivate" and click the "OK" button.

**Phone number XXXXXXXXXX has not been registered in The Web portal – please call your administrator.**

- Login to the Web portal as an administrator.
- From the "Devices" tab, verify the device exists.
- If the device does not appear, contact your Verizon Wireless sales rep to add the device to your account.

**The phone is no longer registered to use Field Force Manager. Please restart Field Force Manager and register your phone number.**

- Reset Field Force Manager activation.
- Login to the Web portal as an administrator.
- From the "Devices" tab, check the box to the left of the device you are trying to activate.
- Click "Deactivate" and click the "OK" button.