



Verizon Wireless
Field Force Manager User Guide
for BlackBerry Devices



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Application Requirements

- See the Verizon Wireless Field Force Manager support site for list of supported RIM® devices <http://support.fieldforcemanager.com>.
- Application requires 600 KB of memory space to install.
- The Field Force Manager feature must be activated on the phone number for the application to work. Contact your Verizon Wireless business specialist for assistance in adding the feature to your account.

BlackBerry Installation and Initial Setup

Enabling location services on the device.

Verizon Wireless values your workers' privacy. Because of this, the mobile phone is defaulted to only acquire location information when dialing 911. To use location-based services (LBS) such as Field Force Manager, you must first enable location services on the mobile phone.

1. Go to the BlackBerry Options menu.
2. Select **Options—Advanced**.
3. Select **GPS**. See Figure 1.

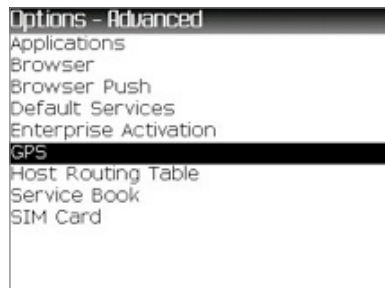


Figure 1

4. Set **GPS Services** to **Location On**. See Figure 2.

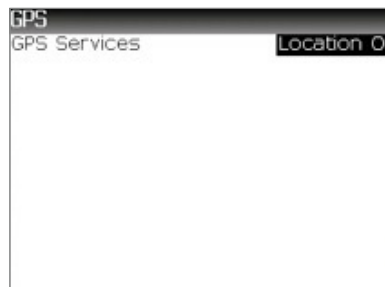


Figure 2

5. Select the **CLR** button, and save the change.

Download and activate Field Force Manager on the mobile phone.

Verizon Wireless recommends that you install and activate the Field Force Manager mobile phone application for your workers before performing the mobile worker training.

For BlackBerry devices:

If you are unsure of what type of mobile device you have, go to <http://support.fieldforcemanager.com/devicelist.asp> for a device list.

1. Start **Browser**. See Figure 3.



Figure 3

2. Choose **Field Force Manager** from screen. See Figure 4.



Figure 4

3. Select **Install Field Force Manager**, and push the trackball. See Figure 5.



Figure 5

4. Verify correct RIM firmware version (if applicable) is installed.

5. Check **Set application permissions**, select **Download**, and push the trackball. See Figure 6.



Figure 6

6. Select **View** when the screen reads, "Field Force Manager is requesting changes to its application control permissions." See Figure 7.



Figure 7

7. Set the **Permissions: Field Force Manager** for all connections and interactions to **Allow**. Save changes by selecting **Save**. See Figure 8.

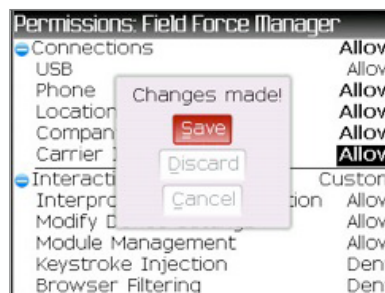


Figure 8

8. The application will download. See Figure 9.



Figure 9

9. Wait for the download to complete.

10. Device will activate using the phone number of the device.

11. Device will automatically log in to the mobile worker for that device.

12. The End User License Agreement (EULA) screen will appear. See Figure 10. Read the agreement before continuing. If you agree to the terms stated, acknowledge by pushing the trackball and selecting **Accept**. If you decline the EULA, the application will exit. You must accept the EULA to use the application.

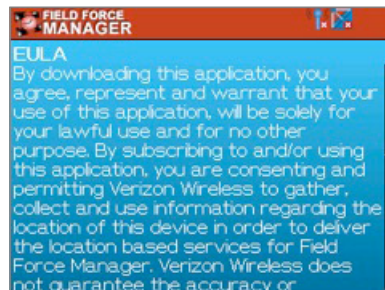


Figure 10

13. A warning screen will come up. See Figure 11. Push the trackball and click on **Accept** to start using Field Force Manager.

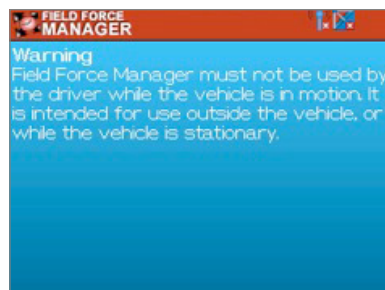


Figure 11

Launching Field Force Manager on your mobile phone.

Select the Field Force Manager logo from the RIM main menu. See Figure 12.



Figure 12

Note: Field Force Manager will automatically launch upon the mobile phone powering up or if Auto Application Launch is enabled during the Field Force Manager Web portal's hours of operation.

Logging out.

To exit Field Force Manager:

1. Select **Exit** from the main menu. See Figure 13.
2. Select **Yes** to confirm that you want to exit the application.

Note: The Field Force Manager application cannot locate or send and receive information when the application has been exited.



Figure 13

Navigating the application.

Throughout Field Force Manager, you will see the commands listed at the bottom of the screen. These commands correspond to the soft keys on your mobile phone directly below them. To select a button, press the soft key below the name of the command you want.

For example, in Figure 14, selecting the **Back** button will return you to the previous screen. Clicking the trackball will bring you to the current selection.

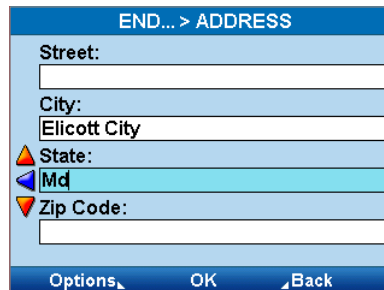


Figure 14

- When instructed to select a particular display line on the screen, use your mobile phone's trackball to scroll vertically through the lists.
- Alternatively, you may also navigate quickly to an item by pressing its number, as displayed to the left of its name, on your mobile phone's keypad.
- In instances where more data exists than can be displayed vertically on the screen, scroll-arrow indicators will appear on the right-hand side of the screen. These scroll arrows provide a visual cue when additional information exists that is not being displayed on the screen.
- Two additional buttons are also mentioned in the documentation: the Red Phone button and the Green Phone button. The Red Phone button is used to temporarily suspend Field Force Manager. It is also used to terminate voice connections. The Green Phone button is used to place a phone call.

Take a phone call.

When someone calls you, Field Force Manager goes into suspend mode automatically. You can take your call as if Field Force Manager isn't running.

Make a phone call.

To place a phone call from within the application, press the **Green Phone** button to go to the address book, or press the **Red Phone** button to go to the RIM main menu.

Suspend Field Force Manager.

Press the **Red Phone** button. This will temporarily suspend Field Force Manager while you place your call.

Return to Field Force Manager after your call.

Select the Field Force Manager icon from the main menu.

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

Field Force Manager Functions

Field Force Manager menu.

The Field Force Manager menu is the application starting point for Field Force Manager. It is the first screen that you see once you have logged into the application. See Figure 15.

- To navigate to the Jobs screen, select **Jobs**.
- To navigate to the Forms screen, select **Forms**.
- To navigate to the Locations screen, select **Locations**.
- To navigate to the Messages screen, select **Messages**.
- To navigate to the Timesheets screen, select **Timesheets**.
- You can also simply press a category's corresponding number to access that function.



Figure 15

Jobs.

Field Force Manager is able to receive job information that is dispatched from the Field Force Manager Web portal. This job information is displayed on your mobile phone and supplies you with valuable information that helps you get your work done. The job functionality is available in the Basic package and the Premium package. The options are different per package.

Premium package:

With the Premium package, the Web portal user can look up and link jobs to known locations in the system, reducing data entry and errors. The Web portal user can view all jobs or a single job. The mobile user can read job details, call ahead to job contacts, and obtain audible and map-enabled driving directions to the job. The mobile user can update the job status to Accept, Reject, In Transit, Start, On Hold, or Complete. Upon completion of a job, the user is prompted to fill out the job completion form. Once a job is complete, the history can be viewed in the portal from the jobs list.

Jobs List screen.

The Jobs List screen displays single-line summary information for each of the jobs that have been dispatched to you on your phone. See Figure 16.

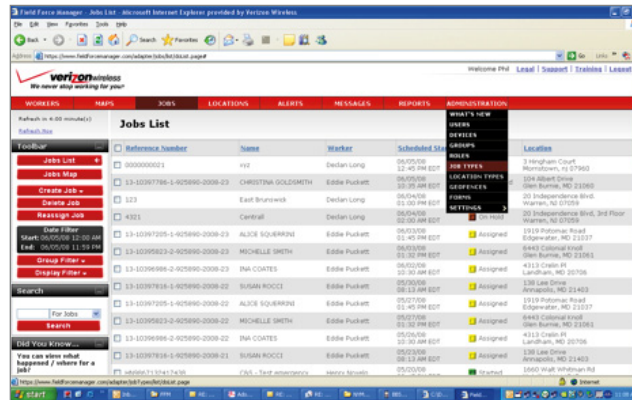


Figure 16

To view detailed job information for a specific job:

1. Select the job by pressing its number on your phone's keypad or scrolling to the job using the trackball.
2. Job titles will display only as many characters as can be displayed on screen horizontally. To view the entire job title, select the job from the list. See Figure 17.



Figure 17

Job Summary screen.

The Job Summary screen lists high-level details regarding a job, including its current status. From here, you can access the Job Details screen, the Job Status Reporting screen, and the Driving Directions screen. See Figure 18.

- To retrieve detailed information regarding the jobs, select **Job Details**.
- To report a change in job status, select **Status**.
- To generate turn-by-turn driving directions to the job, select the job's address.
- To call the job contact, click on the contact name and phone number.



Figure 18

Job Details screen.

The Job Details screen displays all of the information that has been dispatched to your mobile worker. This information includes the customer's name, the estimated time of arrival, expected duration, and a comments field. (The comments field is only available in the Field Force Manager Premium package.) See Figure 19.

To return to the Job Summary screen, select the **Back** button.



Figure 19

Job Status Reporting screen.

The Job Status Reporting screen allows you to report a change in your status to your dispatcher.

To report a change in status:

Select the status you want from the list. A checkmark will appear in front of the newly selected status. This action is sent to the Web portal to notify the Web portal user of the change in status. The job's actual duration will start once the Start action has been performed and will pause when the On Hold action has been performed. To restart the job duration, perform the Start action again. The job will be completed and the final actual duration calculated once the complete action has been performed. (In the Field Force Manager Premium package, the job status can be configured by editing the job type in the job type administration tab. See Figure 20.

Note: Job status reporting is only included in the Field Force Manager Premium package.



Figure 20

Locations.

Field Force Manager lets you receive locations from your dispatcher. You can also request turn-by-turn driving directions from your current location to the new location in both the Basic and Premium packages. In the Basic package, directions will be text-based. In the Premium package, the directions will be audible and map-based.

To obtain driving directions to a location:

1. Select **Locations** from the Field Force Manager menu.
2. Select **My Locations**. See Figure 21.

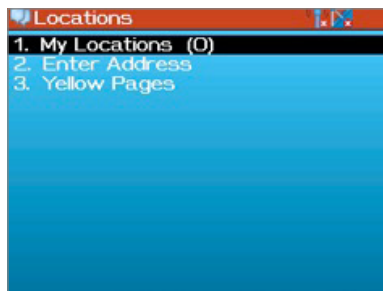


Figure 21

3. Select the address for the location. See Figure 22.



Figure 22

4. The system will now obtain your current location and request directions. Basic package subscribers will receive text directions. Premium package subscribers will receive audible driving directions.

To delete a location from your mobile phone:

1. Select the **Location** you want to delete.
2. Select the **Delete** option on the screen. See Figure 23.

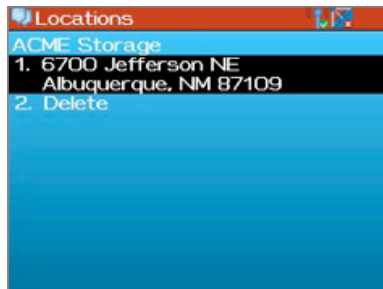


Figure 23

Note: This will not delete the location from the Web portal.

Driving directions.

The Field Force Manager application provides driving directions based on your current location and the location of your job or other destination. The type of driving directions differs depending on which product package you are using.

Basic package: text-based driving directions.

1. Select the **Address** of the job or location within the Field Force Manager application. The application will request text-based driving directions from your current location to the job or location address.
2. Press the **Update** button to request updated directions from your current location to the address.
3. Use the trackball to scroll down and view each step.
4. Press the **Back** button to return to the job or location address screen.

Premium package: audible driving directions.

1. Select the **Address** of the job or location within the Field Force Manager application. The driving directions engine will start up
2. Press **Talk** to hear the directions spoken to you.
3. Use the trackball to view the next or previous turn.
4. Press **Back** to return to the job or location address screen.

To access Enter Address or Yellow Pages:

1. Select the **Locations** menu option.
2. Select **Enter Address** or **Yellow Pages**.

Enter Address.

Choosing **Enter Address** will allow you to enter the specific address you would like to navigate to. You may choose an airport, intersection, or enter a specific address. See Figure 24.

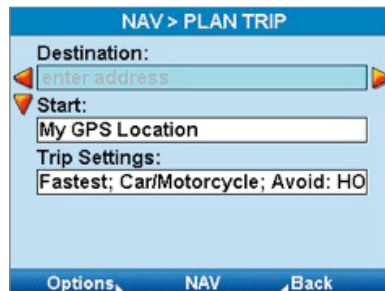


Figure 24

Yellow Pages.

Choosing **Yellow Pages** will allow you to browse points of interest in your area by category. See Figure 25. Once a point of interest is selected, you can navigate to its location.

Once navigating, you will be able to view a trip summary, each turn as it happens, or a map of the entire route.

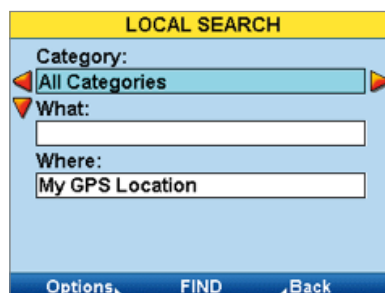


Figure 25

Messages.

The Field Force Manager application is able to receive messages that are sent by your dispatcher. These messages are displayed on your phone. After being read, the messages can be deleted or stored for viewing at a later time. Field Force Manager messaging is only one way, from the customer Web portal to the mobile phone. It does not use Verizon Wireless Text Messaging.

Message screen.

The Message screen displays summary information for each of the messages that you have received on your mobile phone. Messages are sorted and displayed on screen in the order they were received.

To view the contents of a specific message, select the message number on your phone's keypad, or scroll to it and select the message with the trackball. See Figure 26.

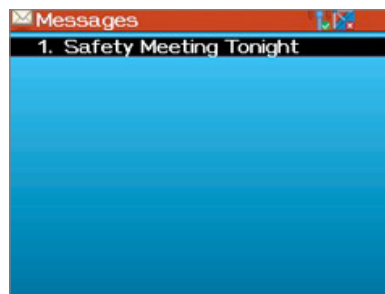


Figure 26

Message Detail screen.

The Message Detail screen displays the contents of the message and details about the sender. See Figure 27.

To delete the message that you are currently viewing, press the **Delete** button.

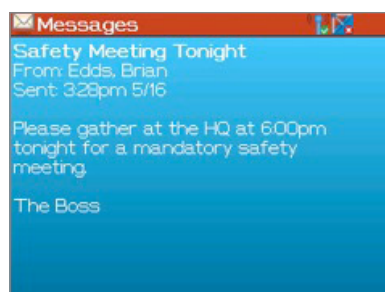


Figure 27

Timesheets.

Field Force Manager lets you log your hours quickly and easily. Just select the appropriate timesheet action from the list, and Field Force Manager will automatically log the time and send the data back to the Web portal. The administrator may also add a form to the timesheet actions to collect data associated with your hours.

To log your time:

1. Select **Timesheets** from the Field Force Manager main menu.
2. Select **Start Shift** when you want to punch in. See Figure 28.



Figure 28

3. Select **Start Break** whenever you take a break. See Figure 29.



Figure 29

4. Select **End Break** whenever you go back to work. See Figure 30.



Figure 30

5. Select **End Shift** when you're ready to punch out. See Figure 31.



Figure 31

Supervisor Timecards.

Field Force Manager Premium package users have the ability to manage timecards for supervised employees. The Supervisor Timecards module allows a supervisor to view the status of all of their managed workers: Start Shift, Start Break, End Break, and End Shift. If the worker is configured to complete forms with their timecard, the supervisor can also complete timecards for the workers. The supervisor can also punch all workers in and out of their shift or break as well. The completed timecards are sent to the Web portal, and the information is presented, used in reports, and can be used to generate alerts.

How to set up a user as a supervisor in the Web portal:

1. Select the **Administration—Roles** tab.
2. Create a new role, and call it Supervisor.
 - a. Add permission for Supervisor under Mobile Device Permissions.
 - b. Save the role.
3. Edit the user who you would like to be the supervisor, and change their role to supervisor. The supervisor will be able to manage workers for the group that the supervisor is in. Supervisors can only be in one group.

Note: Supervisor Timecards are designed to be used by a single supervisor. Using two supervisors or a supervisor and a mobile worker to complete a worker's shift may result in a worker being punched in or out multiple times. The Field Force Manager system always uses the first action when multiple timecard actions are performed for a worker on a single shift.

How to perform the Supervisor Timecards function on a mobile device:

1. Log in to the mobile device. If the user has the supervisor role, as configured above, a new menu called Supervisor will appear between Timesheets and Exit.
2. Select the **Supervisor** menu. See Figure 32.



Figure 32

- a. The screen will display five options. See Figure 33.
 - i. **Managed Workers**—This menu will display a list of all mobile workers in the supervisor’s group. For each worker, the worker’s latest status and the date/time they went into that status will be displayed.
 1. To Start Shift for a worker:
 - a. Select the **worker** from the Managed Workers list. If their status is Off Duty, select the **worker**, and then select **Start Shift**.
 2. To Start Break for a worker:
 - a. Select the **worker** from the Managed Workers list. If their status is On Duty, select the **worker**, and then select **Start Break**.
 3. To End Break for a worker:
 - a. Select the **worker** from the Managed Workers list. If their status is On Break, select the **worker**, and then select **Start Break**.
 4. To End Shift for a worker:
 - a. Select the **worker** from the Managed Workers list. If their status is On Duty, select the **worker**, and then select **Start Break**.

Note: *If a company is configured to complete a form with each timesheet action, a form will be displayed when the action is performed.*

- ii. **Start Shift All**—This menu will start the shift for all workers that are managed by the supervisor whose status is currently Off Duty.
- iii. **Start Break All**—This menu will start the break for all workers that are managed by the supervisor whose status is currently On Duty.
- iv. **End Break All**—This menu will end the break for all workers that are managed by the supervisor whose status is currently On Break.
- v. **End Shift All**—This menu will end the shift for all workers that are managed by the supervisor whose status is currently On Duty.

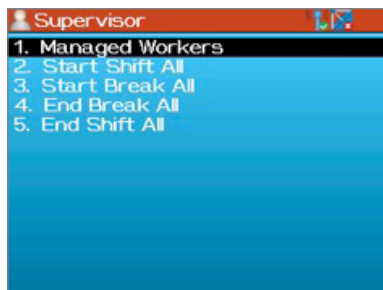


Figure 33

Forms.

Field Force Manager allows you to complete your paperwork using forms on your mobile phone. Forms can be completed as a part of Timesheets, Jobs, or Standard Forms. Standard Forms are available from the Forms menu on the mobile phone. The administrator will create these forms from the customer Web portal and assign them to specific mobile workers.

To complete a form:

1. Select **Forms** from the Field Force Manager menu.
2. Select the form you want to fill out. See Figure 34.



Figure 34

3. Enter a value for each field. See Figure 35.

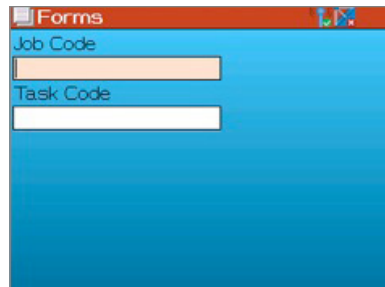


Figure 35

4. Use the trackball to navigate to the next field.
5. Select **Submit**, once you have completed the form. The submitted form will immediately be sent to the Web portal.

Bar-code scanning.

Forms can also be completed using a Bluetooth®-attached bar-code scanner. When a user enters a form, the phone will begin listening for text and numbers to be sent from the Bluetooth-attached device.

Note: Field Force Manager supports the Microvision ROV and Baracoda RoadRunner's Bluetooth bar-code scanner.

To set up the bar-code scanner:

1. Go to the phone's **Bluetooth** control panel (Menu>Bluetooth).
 - a. Go to **Setup** and ensure Bluetooth is powered on.
 - b. Go to **Link to Devices**.

- i. Turn on the scanner.
 - ii. Phone will find the device, and then you choose the scanner from the list.
 - iii. Enter **0000** for the Bluetooth passkey.
2. Enable Barcode Service preference in Field Force Manager.
 - a. Go to **Administration-Company Settings**.
 - b. Select **Enable Barcode Service**.
 - i. Select the correct type of scanner (none, Baracoda, or Microvision).
 - ii. Save the change.
3. Press *** #** on device to sync the setting.
4. Log out of the application and back in to the application to start the bar-code service.
5. Upon starting the Field Force Manager software, the application will prompt the user to connect to the Bluetooth device, the user should choose **Yes**.
6. When a user enters a field in the application, the bar-code scanner will have the ability to scan a bar code into the field. The bar-code scanner will make a successful sound when successfully entering data into a field, and will make an unsuccessful sound when the scan does not successfully enter data into the field.

Note: The Field Force Manager software will alert you if the firmware of your scanner needs to be updated.

Status icons.

The Field Force Manager application displays service icons in the upper right-hand corner of the application to allow users to easily understand the current state of the application. These icons are useful to communicate issues during the troubleshooting process.

Service	Not started	Starting	OK—idle	OK—working	Error—idle	Error—working
Network communication						
GPS						
Printer						
Bar-code scanner						

Definition	Description	When you will see this
Not started	The service is not started.	Services are started automatically at application start-up. If you see an application in this state, then the application service has stopped. Restarting the application should fix the issue.

Starting	The service is currently starting.	You will see this while the application is starting up. Once the user is at the main menu, all services should be started.
OK—idle	The last service attempt was successful. The service is not currently attempting to perform its function.	This should be the normal state for most services. Everything is okay when you see this icon.
OK—working	The last service attempt was successful. The service is currently attempting to perform its function.	This is a normal state that happens anytime the application communicates or attempts to collect GPS information.
Error—idle	The last service attempt was not successful. The service is not currently attempting to perform its function.	You will see this when the phone is out of the service area. Once the phone returns to the service area you should see the status return to OK.
Error—working	The last service attempt was not successful. The service is currently attempting to perform its function.	You will see this when the phone is out of the service area. The service is currently attempting to perform its function.

Options menu.

Pressing * * will bring the user to the Options menu. You will then be prompted to enter a PIN number (default is 4321). This menu offers administrative and troubleshooting features.

- Device summary
 - View detailed device information under the device summary.
 - This contains helpful information when calling customer support.
- Server sync
 - Force the application to download new or updated jobs, locations, messages, and preferences.
- Clear activation
 - Reset the device activation on the device and the server.
 - The device now resets the activation on the server as well, eliminating the need for a Web user to log in and clear the activation.
- Clear record store
 - Clear all data stored on the device.
- Volume
 - Change the new/changed item notification volume (low, medium, high, and beep).



- Force login
 - Force the user to log in upon the next application restart.
 - This replaces the traditional * 0 functionality.
 - Useful if the login mode is set to automatic and you need to log in another user.
- Retrieve GPS
 - Force the application to collect and store a GPS point.

Printing.

Field Force Manager mobile workers can print out receipts to Bluetooth-attached printers. The receipts are printed from a job action when the user selects a job action that is configured to print a print string. Job actions and print strings can be configured in the Field Force Manager Premium package under job type configuration.