



Field Force Manager

OA FFM

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1 Purpose of the App

There are a number of businesses that have a direct sales force or a number of staff working across different locations in various parts of the country or the world. They may be selling products face-to-face to your clients, they may be taking products back, they may even be collecting information or making people fill up forms or they may be servicing your customers door to door. Field force plays a vital role for any business organization.


With these numbers of employees on the field there comes various questions like How do we manage this huge workforce that is out there on the field and doing their jobs? How do you tally the results with the investment or even better, try and make changes to existing field plans?

What is my plan?



Day/Week Planner uploaded from Field Management Application..


How can I record my visit?



Single Click Recorder & Speech to Text Conversion.


Guess what .. You can also punch your unplanned meetings ..

What route to take?




Integrated with Google Maps for the shortest possible route...

Network Problems ??



Don't worry . It works in both Online & Offline Mode..



Field Force Agent

It is increasingly clear that there needs to be a certain sense of discipline and streamlining of field operations. This is one of the reasons why it is important to automate certain tasks within field sales and operations. This helps you to track your assets remotely and contact with your workforce when required.

They may also be able to get in touch with you if it is required. Most importantly, engineers, sales representatives and customer care executives can easily send information, scanned receipts and other crucial information to you in a standardized and streamlined manner. This helps in regulating your business and also bringing some order to what is usually a very chaotic way of working.

The benefits of the Field Force Manager can be summarized as follows:

- Add-on integrated module of Microsoft Dynamics 365 for Customer Engagement.
- A simple and easy to use solution for managing field force agents and their DCR* (*DCR is short for Daily Call Record, it is the list of activities that a field agent has to complete on his work day)
- An ease for field agents as they will not have to deal with routing and can make the best out of their time.

2 Primary functions

Terms	Definition	Notes
Setups	Helps in the initial configuration of the mobile application	Mobile application configuration and setup
DCR route map	Helps in planning the activities and route of an agent on the field	FFM mobile application will prepare a route map based on the activities assigned to the agent on any workday.
Handling unplanned activities	Helps in handling unplanned meeting/visits while on a workday	This functionality will help to cater unplanned activities by suggesting the nearest field agent available nearby and afterwards by suggesting the suitable route.
DCR details	Helps in tracking the activities/visits performed by the agent	Field agent can punch in the activity/visit performed along with details/discussions happened with the customer/prospect. The location of the Agent will also be logged.
DCR creation from CRM	Helps in creation of DCR for field agents	This will provide the functionality of creation of DCR for field agents from Dynamics 365.
Field agent attendance	Helps in tracking attendance of the field agent.	FFM will record the total time an agent has worked on a day. Using the detail of his workday start and last activity punch in information we can have the information on how much time an agent has spent on a day.
Offline operation	Helps in achieving the functionality even when the network in the phone is not available or it is too weak.	FFM can store the important DCR relation information locally on mobile device so that the agent's tasks are not hampered due to no connectivity. In this case data is saved offline and pushed to CRM as soon as the user comes back online.

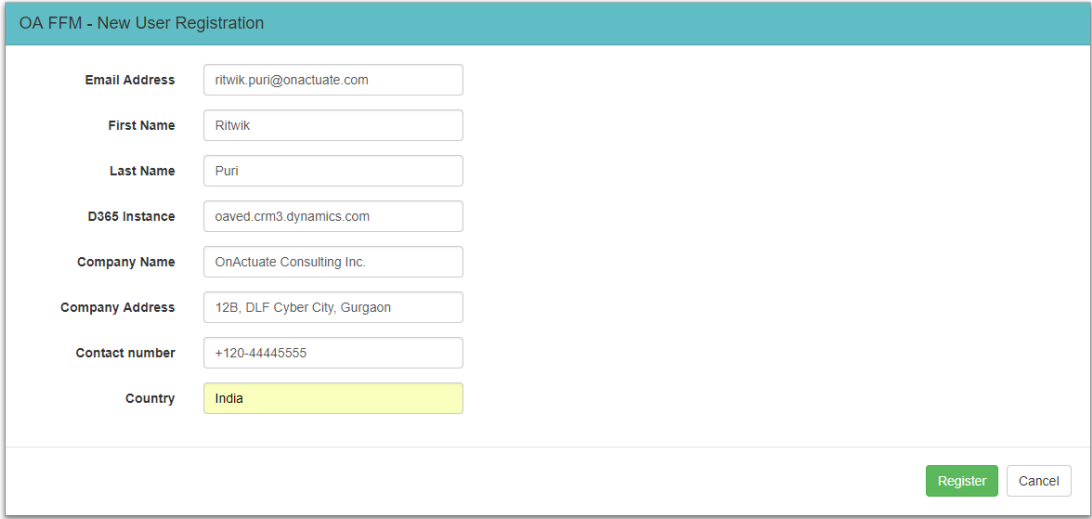
<p>Speech to text conversion</p>	<p>Helps in making the processes faster by avoiding manual typing of the unplanned activities</p>	<p>FFM also provided the feature to quickly enter unplanned meeting without typing out all the required details. Just speak the information and FFM will create unplanned activity on the go.</p>
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3 Application process flow

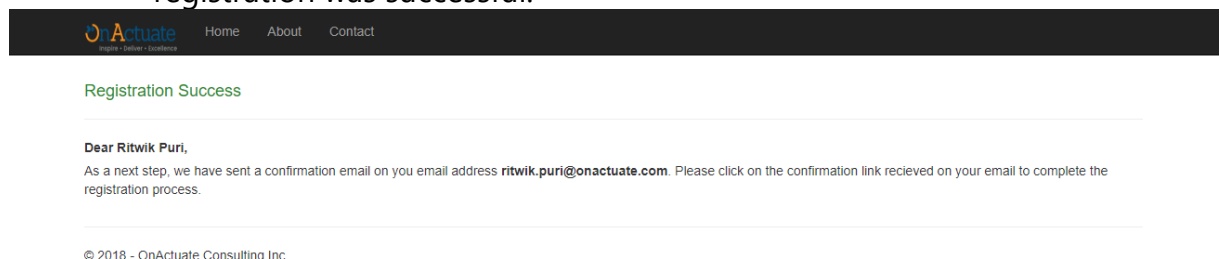
FFM application flow contains below two components. How to use guidelines are given below in section 3.1 and 3.2.

3.1 Dynamics 365 Application



- To be able to use OA-FFM extension, user must register first. Steps to register are as follows:
 - Go to <https://oalabs-ffm-common.azurewebsites.net> . You will be presented with a registration form as shown in the picture below.



- Fill in the required Details and press the register button. Please note that the email address that you will mention in the registration form must match the primary email address of the user made for you in D365 for CE.
- If the required details are correct. User will get a page saying their registration was successful.



- User will get an email with the link to verify their email.

 Fri 07-12-2018 18:51
Cloud ManageServices
Verify your email
To  Ajay Kumar

Dear Ajay kumar,

This is the confirmation email for your registration to use our extension **OA-FFM**. Please click on the below link to verify your email address.

click [here](#) to verify your email

Please ignore this email if you have not registered with us.

Thanks and Regards,

OnActuate Consulting Inc.

Email: support@onactuate.com

- Click the link the verification email. User will get a verification confirmation, like shown in the screenshot below.



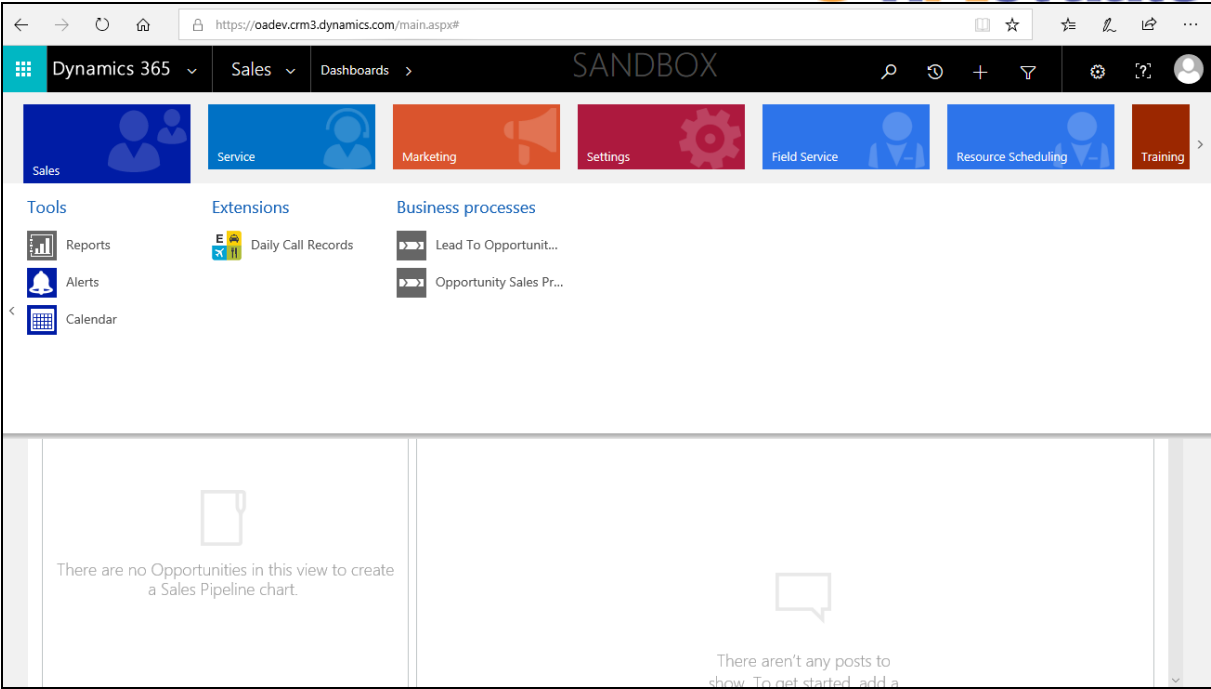
[Home](#) [About](#) [Contact](#)

Verification Successful

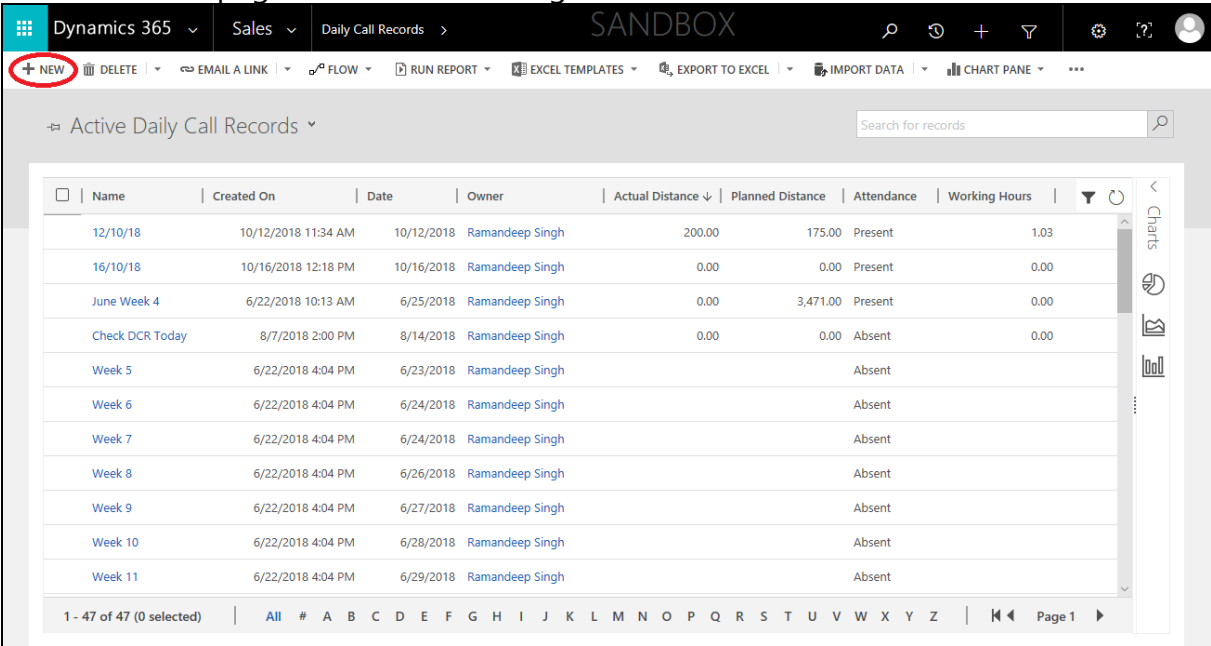
You are now registered successfully. Please go to your Instance of D365 for Customer Engagement and start using OA-FFM extension. Thank you.

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- Once user's email is verified, he will be assigned a 30 day trial license to use OA-FFM extension.
2. After registration. Install the OA-FFM extension on your instance of D365 for CE.
 3. Go to Sales > Extensions > Daily Call Record. This will take you to the Daily call records view, where you can find all the active daily call records



4. To create new DCR, click on **NEW** button at the top left corner of the DCR view page, as shown in the figure below.

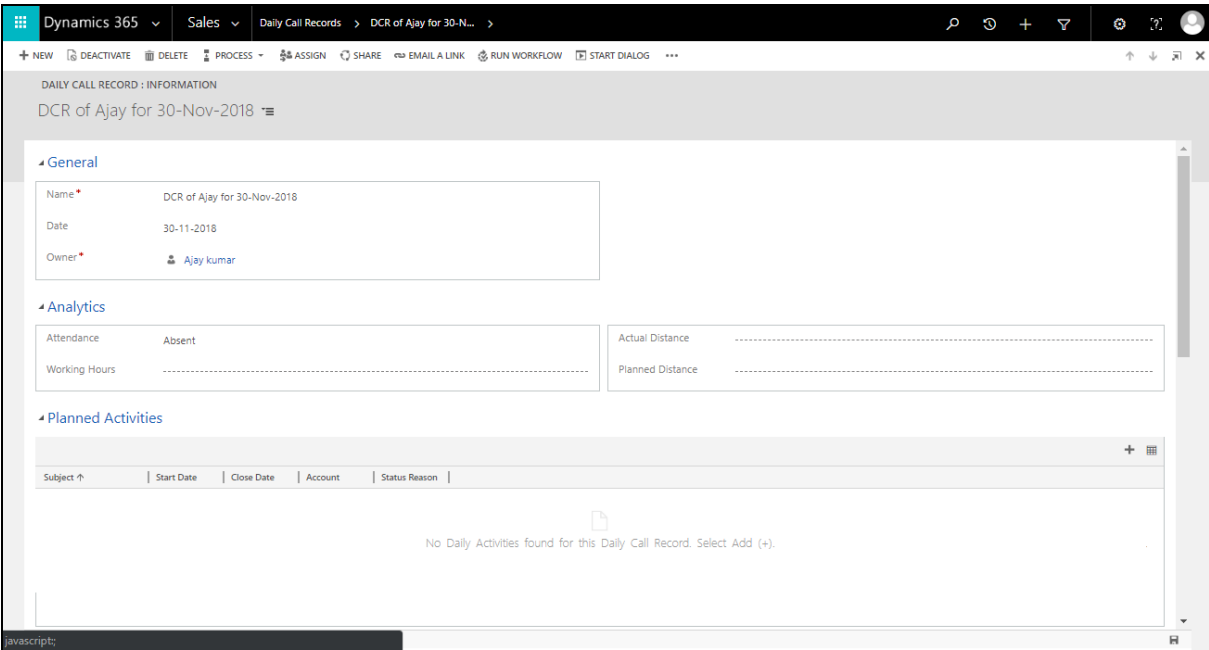


5. Once the new DCR creation form appears, fill in the required details. Description of the fields in the form are mentioned in the below table.

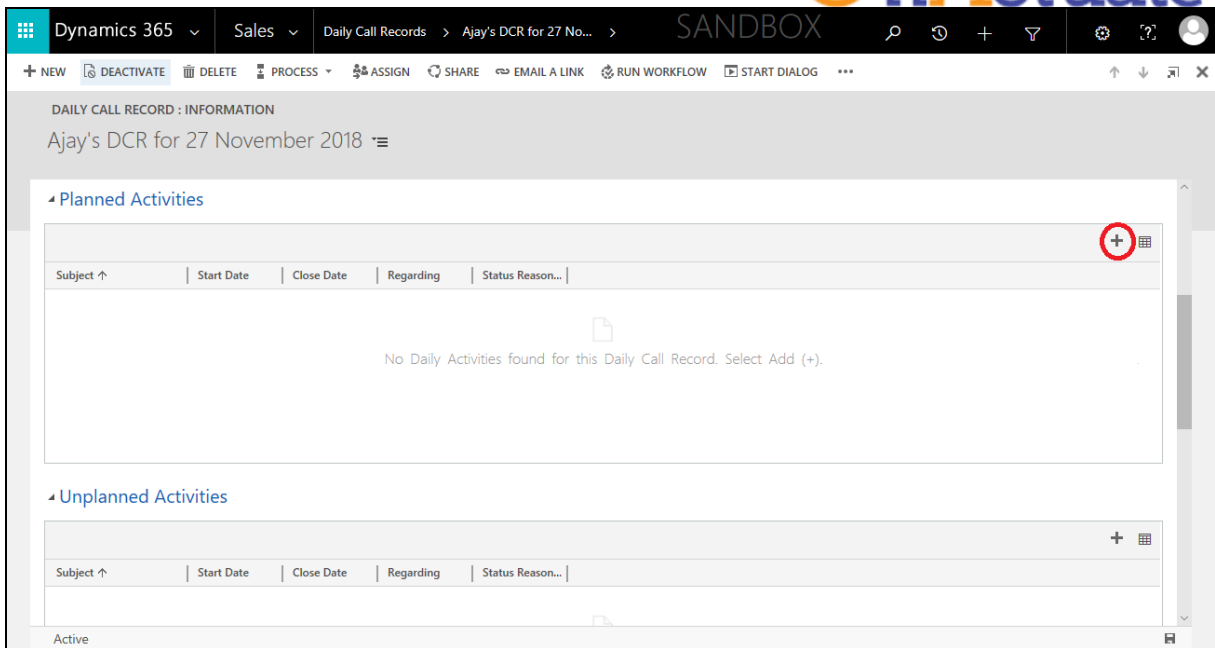
Sr. No	Field Name	Field Type	Required	Description
1	Name	Text	Yes	Used to identify

				the DCR. Example Value: John's DCR for 18 July 2018
2	Date	Date	Yes	This field represents Date on which this DCR has to be followed
3	Owner	Lookup (User)	Yes	This field represents the field agent who has to follow this DCR
4	Attendance	Two Option	No	If DCR activities are punched from the FFM mobile application, attendance of the field agent will be marked as Present.
5	Actual Distance	Decimal	No	This field represents the distance that agent has covered during his/her day following DCR
6	Planned Distance	Decimal	No	This field represents the distance that was estimated during creation of the DCR
7	Working Hours	Decimal	No	This field represents the total number of hours the agent has spent while on the field
8	Planned Activities	Grid	No	This section represents the

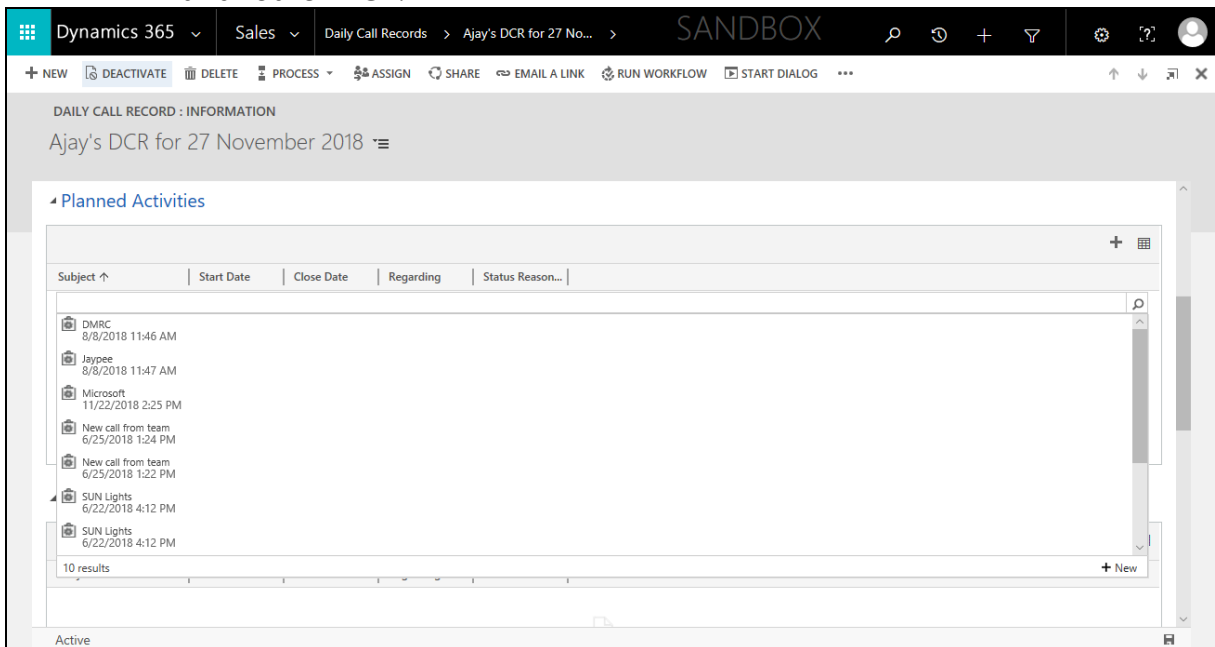
				planned activities that are associated with the DCR
9	Unplanned Activities	Grid	No	This section represents the unplanned activities that are associated with the DCR

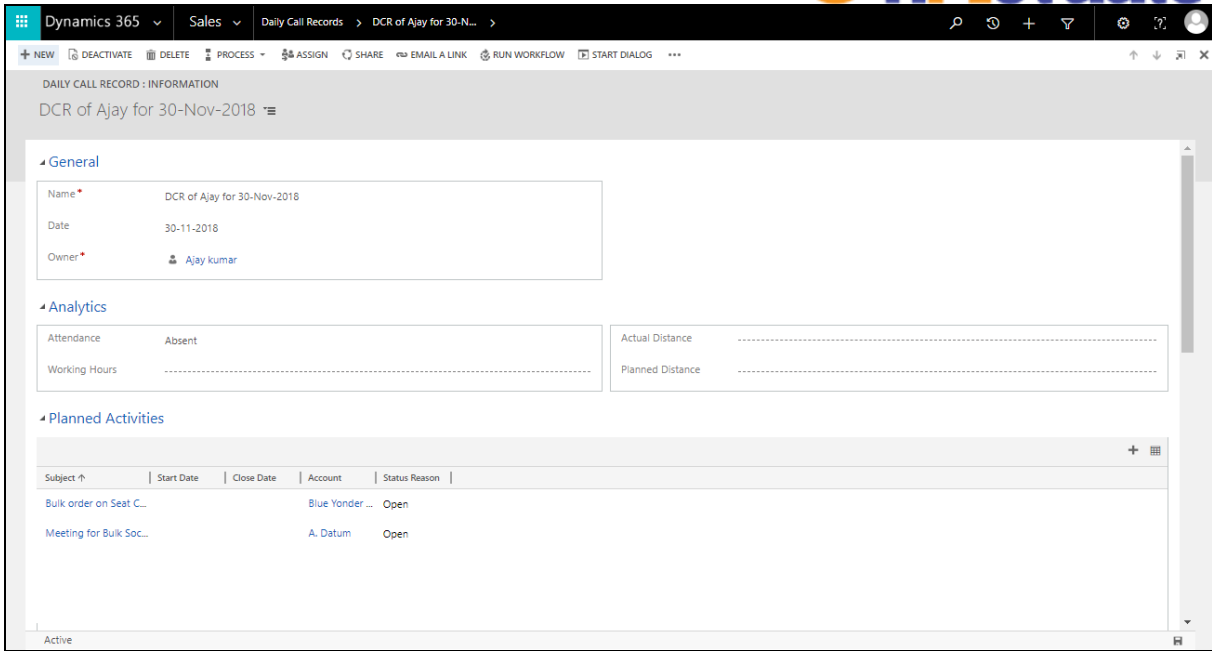


6. Click **SAVE** on the top left corner of the DCR creation form
7. Go to the planned activities Grid on the DCR creation form. Click add button (+) on the top right of the grid, as shown in the image below.

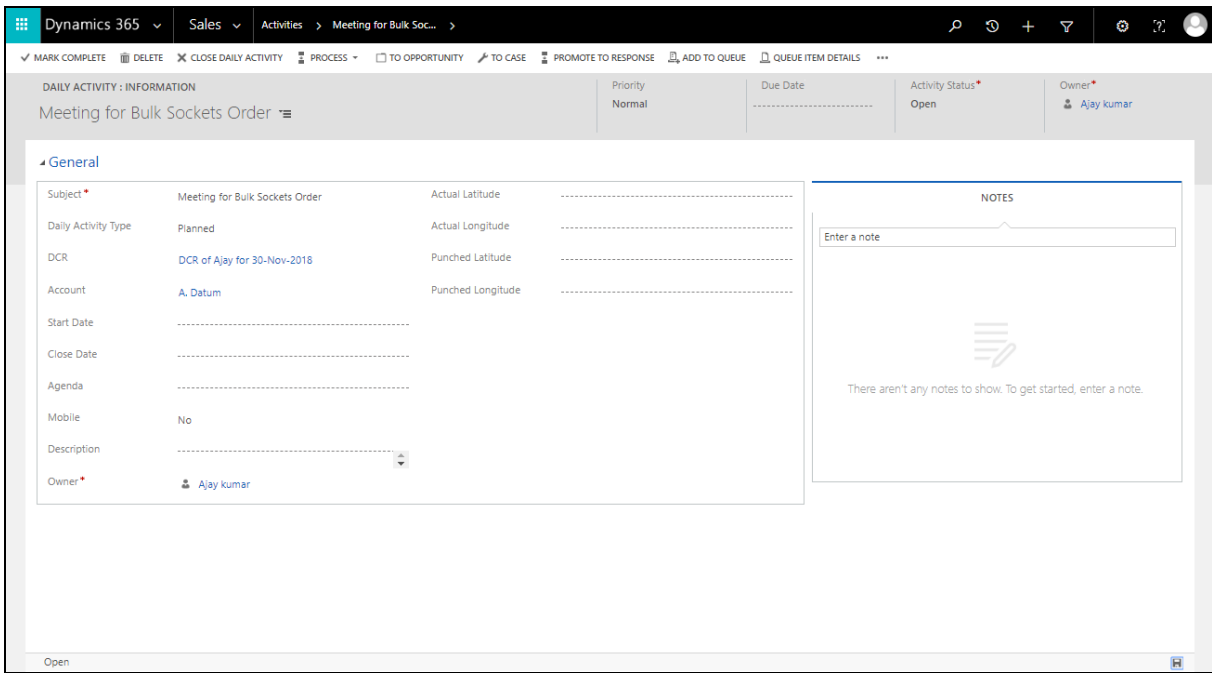


8. After clicking on Add button (+) you will see a blank planned activity line inserted in the planned activities grid. Click on the right most side of the planned activity line.
9. A dropdown window will appear. Click **New** to add new activity. If you wish to select any existing activity, then make sure that activity is not associated with another DCR.





10. New activity creation form will open



11. Add the details in the activity. Details and descriptions of the fields are given below. Please read the field descriptions before inserting value in any required inputs.

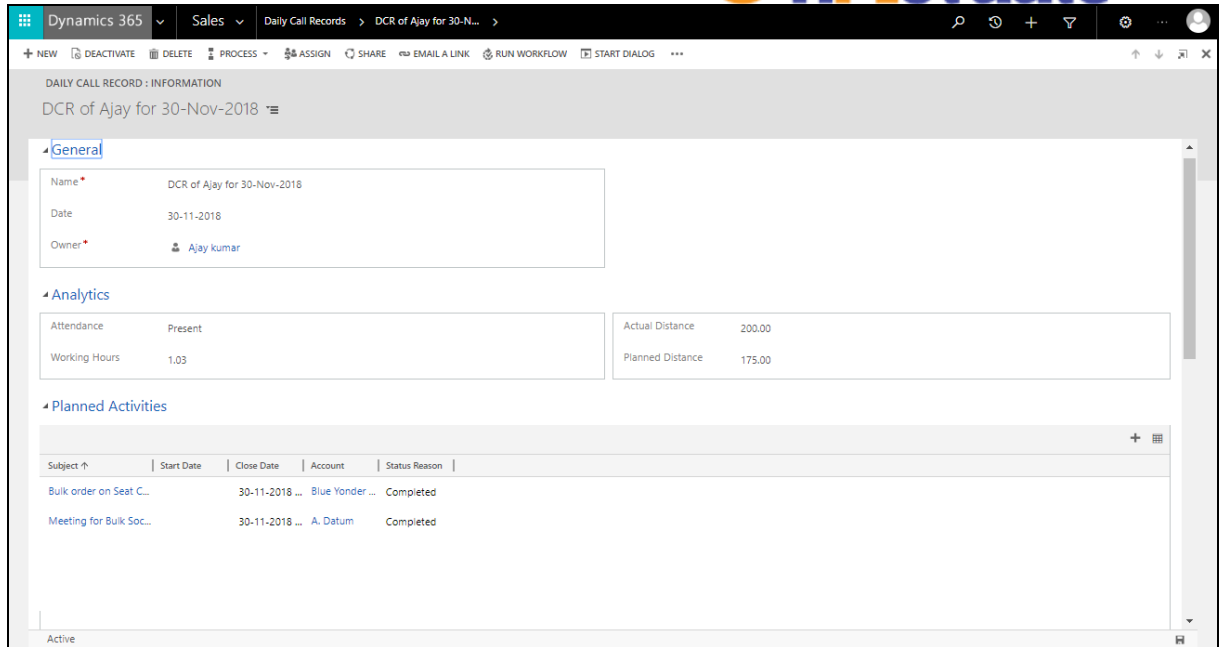
Sr. No	Field Name	Field Type	Required	Description
1	Subject	Text	Yes	This field represents the

				person whom the agent will meet during this activity
2	Daily Activity Type	Multiple options	Yes	This field represents the type of the activity. Possible options are Planned, Unplanned, Campaign planned
3	DCR	Lookup (DCR)		This field represents the DCR associated with the activity in discussion
4	Account	Lookup (Account)	Yes	This field represents the account that the agent has to visit while working on this activity. Note: In case of unplanned activities this value is optional. Note: In Case of planned activities, the selected account must have the latitude and longitude values.
5	Start Date	Datetime	No	Start date and time of the activity
6	Close Date	Datetime	No	Close date and time of the activity. This activity will be automatically populated when agent punches out this activity.
7	Agenda	Text	No	Topic of discussion during this activity. Note: This field will be populated from the data coming from mobile app.
8	Mobile	Two Option	No	This field represents whether the activity has

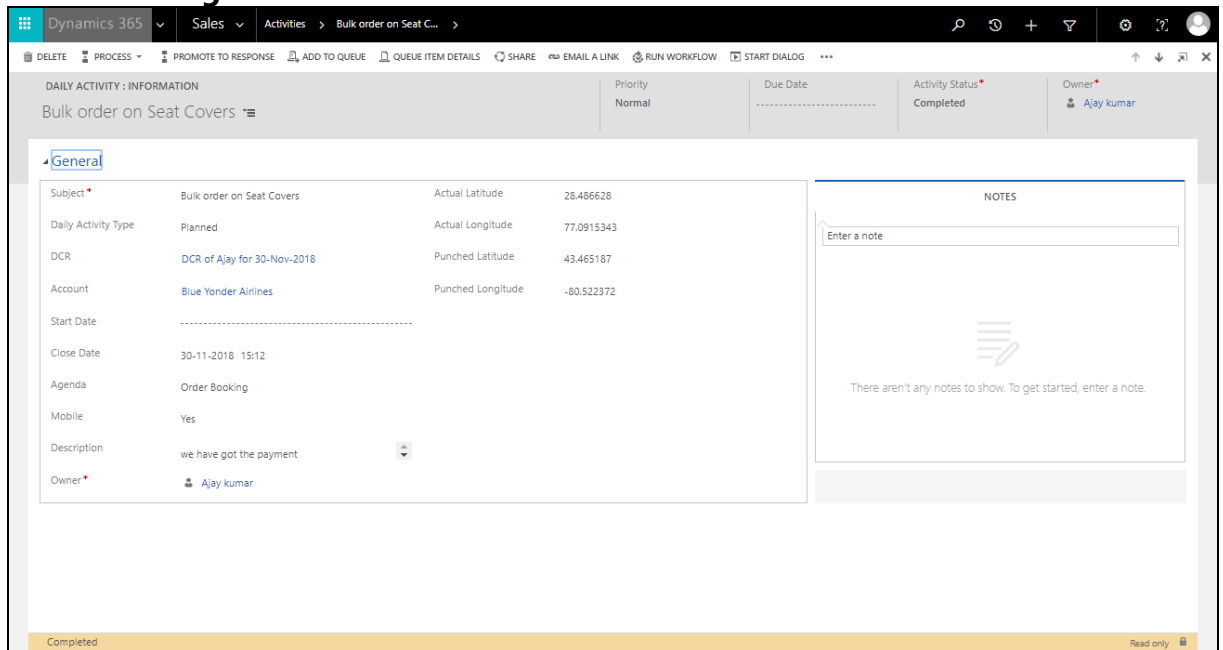
				been punched in from FFM mobile application or the from the CRM itself.
9	Description	Text	No	This field represents additional details about the agenda of the activity
10	Owner	Lookup (User)	Yes	This field represents the agent who has to work on this activity.
11	Actual Latitude	Decimal	No	This field represents the latitude value of the location that was entered during activity creation
12	Actual Longitude	Decimal	No	This field represents the longitude value of the location that was entered during activity creation
13	Punched Latitude	Decimal	No	This field represents the latitude value of the location where the agent has actually punched in the activity
14	Punched Longitude	Decimal	No	This field represents the longitude value of the location where the agent has actually punched in the activity

11. Save and Close the Activity. This step will add new Activity into the DCR in discussion.

12. After all the activities are punched in from the mobile application we will have a few additional values filled in DCR like **Attendance, Actual Distance, Working Hours, Planned Distance.**



13. For each completed activity we will get the punched in details. These details will include **Agenda, Mobile, Close Date, Description, Punched Latitude, Punched Longitude.**



3.2 Mobile application

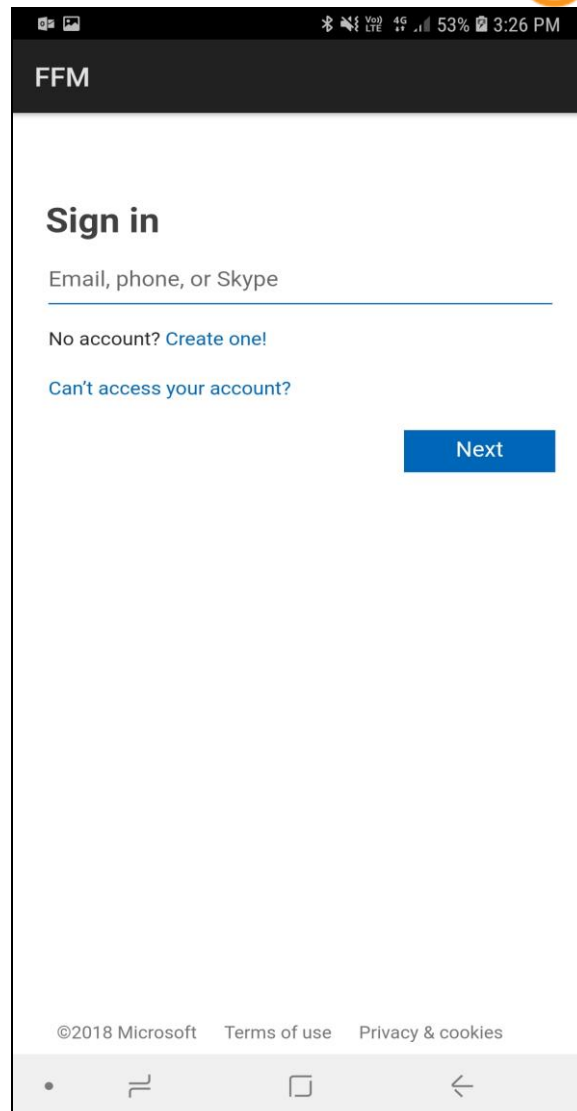
3.2.1 Purpose and Scope of the Mobile app

- FFM mobile captures Geo Locations of Field Agents.
- The first punch for the user shall be considered as the attendance for the day.

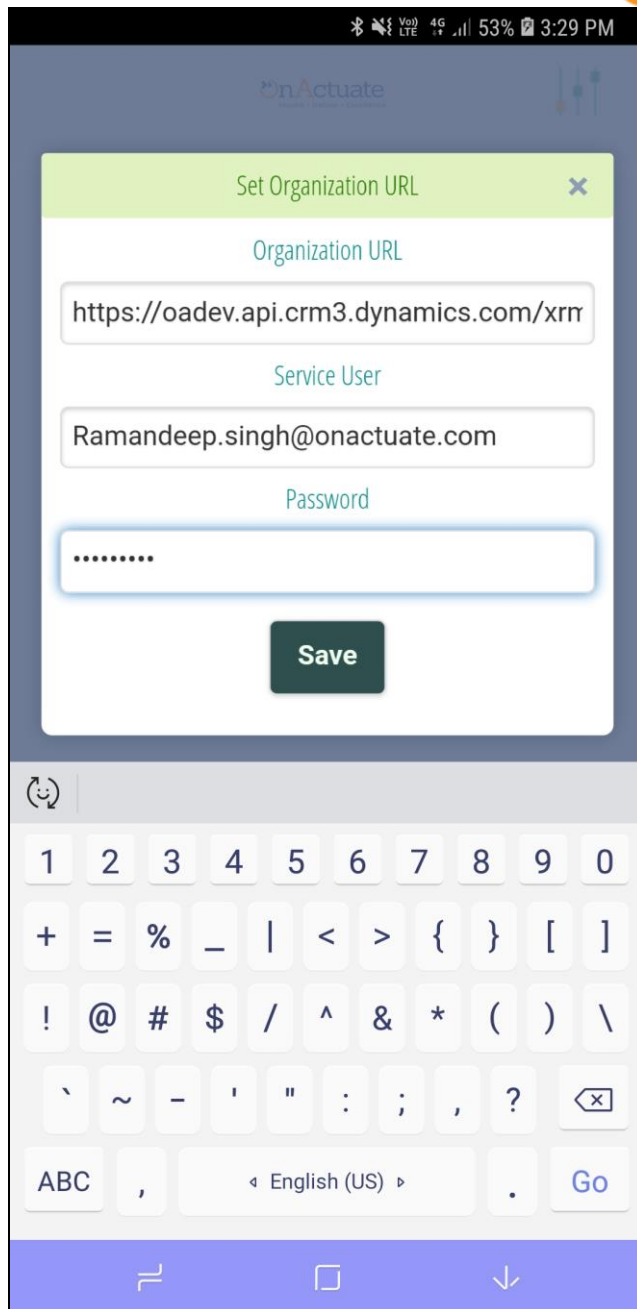
- Planned route (Route created by the Field agent/admin) shall be showcased onto the mobile app in form of waypoints on a google map along with the list of the same (DCR shall be shown).
- The user can select either planned or unplanned meetings.
- As per planned route, the agent shall travel and at every meeting point, shall click the "Save and Submit" button to mark his presence for that customer along with the selection of the customer in the list and keying in notes for the same along with the agenda.
- For unplanned route, reason and description shall be keyed and punched along with coordinates and time and date for the day.
- The route shall be sorted based on the current location.
- The user can also Cancel the meeting selecting agenda as "Cancelled Activity".

3.2.2 Usage guidelines for mobile app

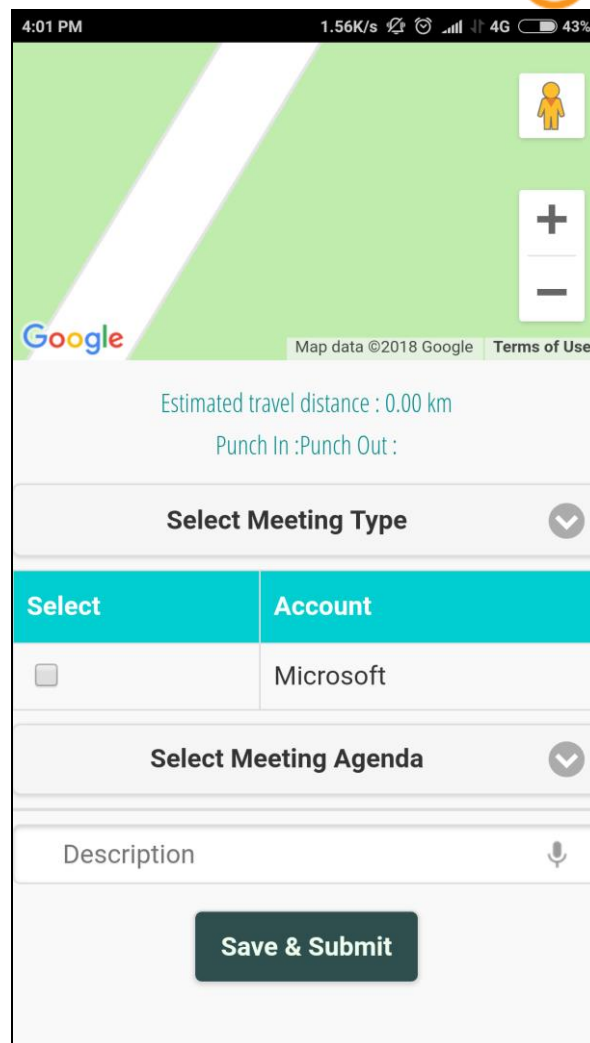
1. Download and install the Android application from <https://play.google.com/store/apps/details?id=io.cordova.FFM> . iOS devices are not supported at the moment.
2. Open the mobile app. If not already logged in, you will be encountered with the login page.



3. Login using your office account (This step will be skipped if user has already logged in to the mobile app)
4. If using it for the first time you will get a configuration page. If you see configuration page then go to section 3.2.3.



5. Mobile app dashboard will appear where you can see all of your planned activities along with the route required to follow to complete those activities.



3.2.2.1 Handling Planned meetings

6. You can finish any planned activity by following the below steps
 - a. Select the meeting type as planned(Selected as default on start-up of app).
 - b. You will be able to see all the planned meetings that are set against you DCR of the day.
 - c. Select the meeting(s) by using checkbox provided against each account.
 - d. Select meeting agenda from "**Select Meeting Agenda**".
 - e. Provide any descriptions/notes in the description text box.
 - f. Hit **Save & Submit** Button.

3.2.2.2 Handling Unplanned meetings

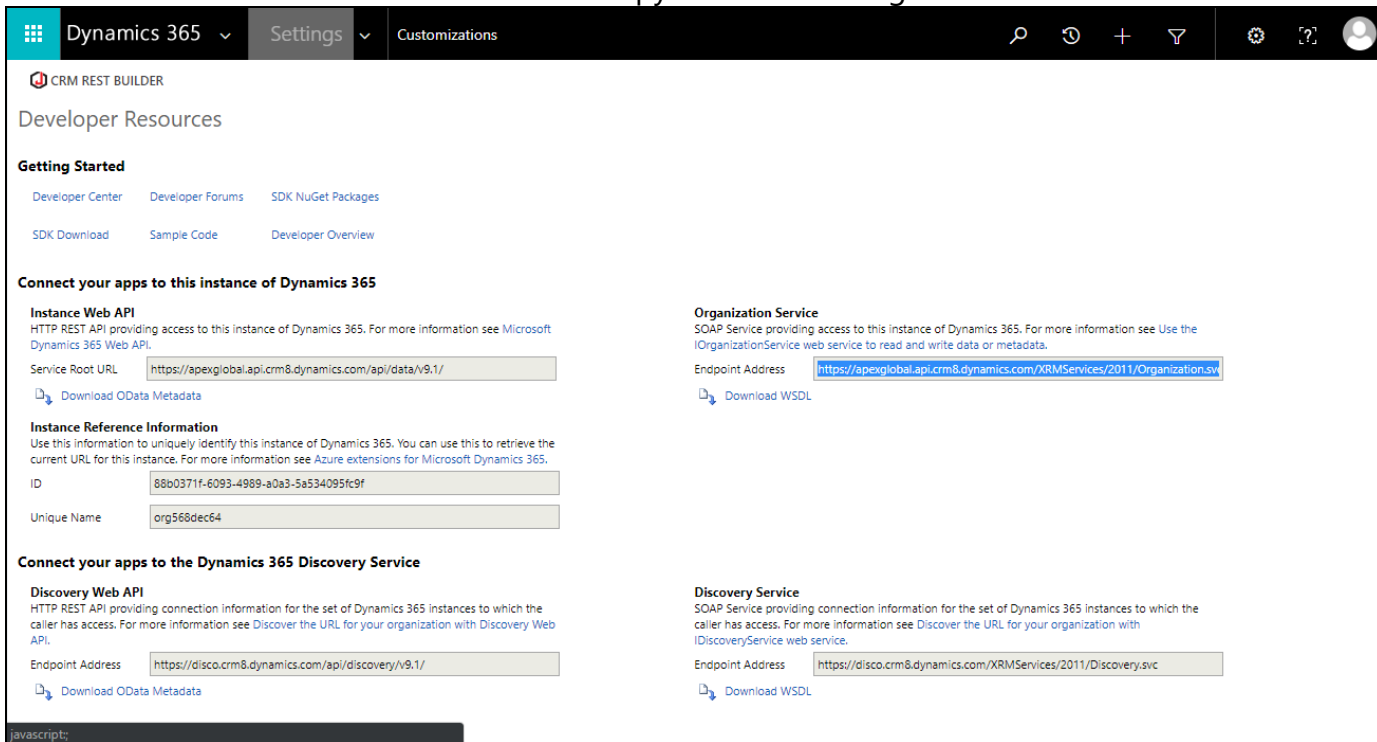
7. You can manage any planned activity by following the below steps
 - a. Select the meeting type as unplanned.
 - b. Select meeting agenda from "**Select Meeting Agenda**".

- c. Provide any descriptions/notes in the description text box.
- d. Hit **Save & Submit** Button.

3.2.3 Mobile app Configuration

If you have not already configured the mobile app with the details of your Dynamics 365 Organizational URL, then you will need the help of you Dynamics 365 Admin for the same. All the below mentioned steps are need to be performed by the Administrator of you instance of Dynamics 365 for Customer Engagement.

1. Find the organizational URL of your instance of Dynamics 365 for Customer Engagement.
 - a. Open Dynamics 365 for customer Engagement.
 - b. Go to Settings > Customizations > Developer Resources, as shown in the screenshot below. Copy the value of Organization service.



2. For creating service user follow the link <https://community.dynamics.com/crm/b/razdynamicscrmconsultant/archive/2016/06/12/setting-up-a-service-account-without-a-crm-licence>