

How to Use the Field Service Lightning Driver App

To see a video of these instructions, scan this QR code:



1. Open Field Service Lightning.



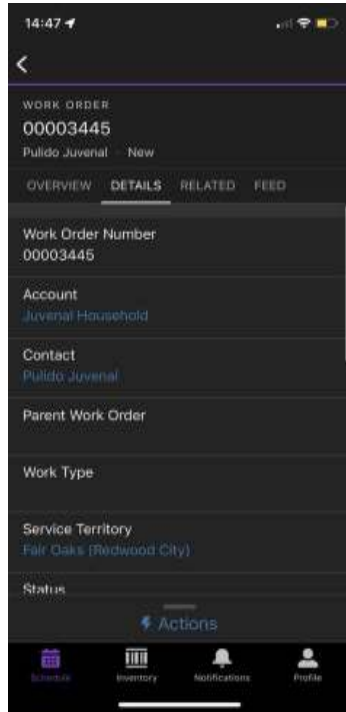
2. Click into the app to view your routes and Service Appointments for the day.



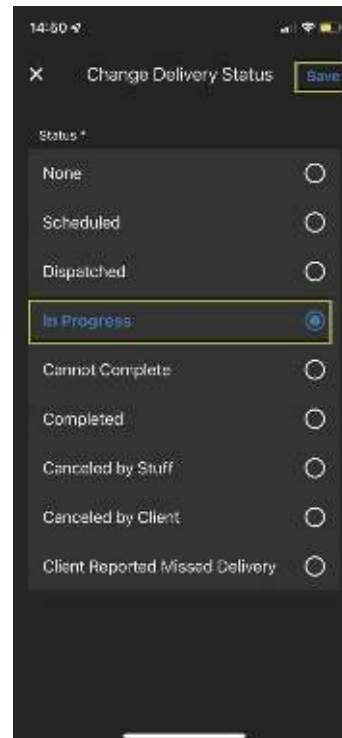
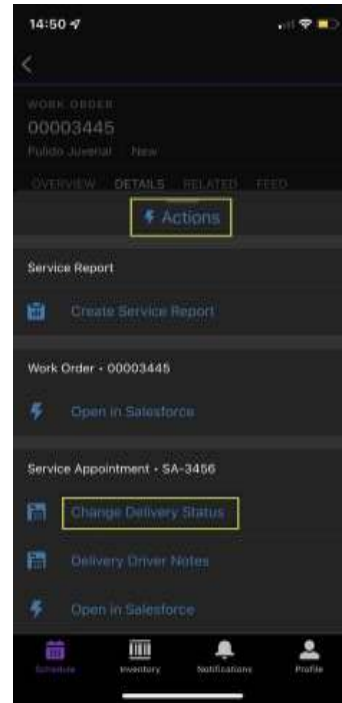
3. To view a Service Appointment and make a delivery to the client's home, click in the first Service Appointment (this has the SA-).



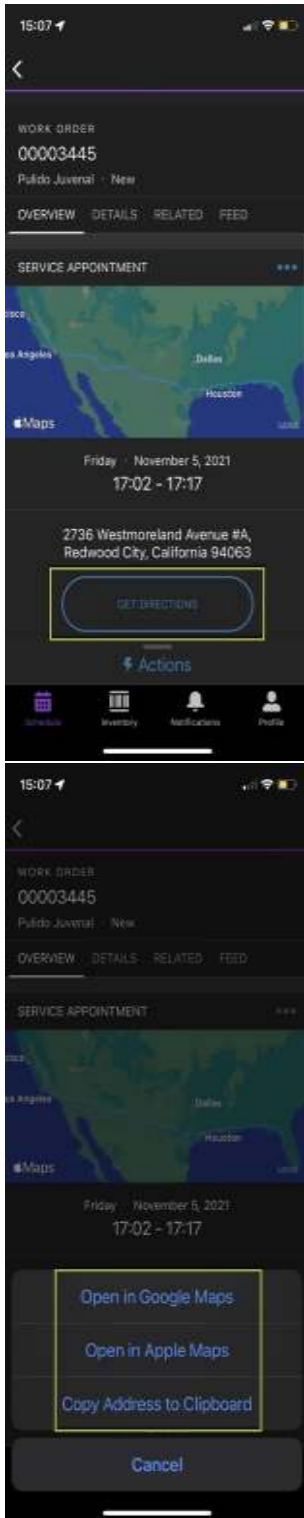
4. Click on “Details” to view the client’s contact information, delivery instructions, gate code, building number, preferred language, etc.



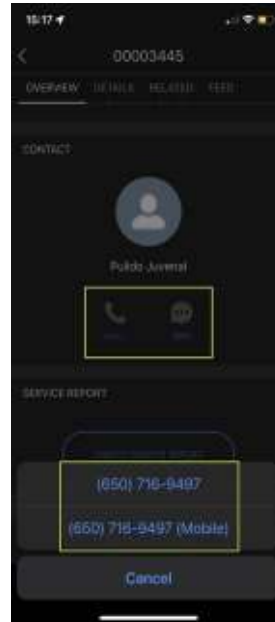
5. When driving to a client’s home or attempting to make a delivery, always change the status to ‘In Progress’. To change the progress, click on ‘Actions’ at the bottom of the page.



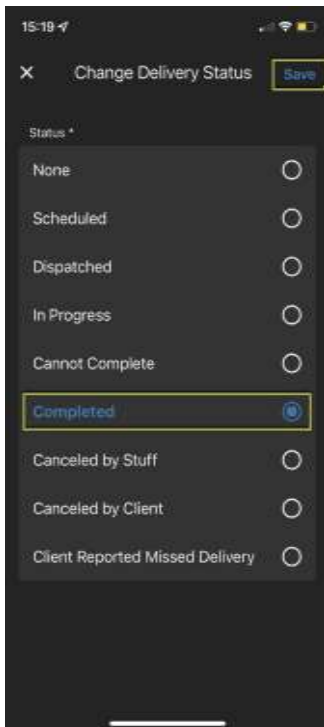
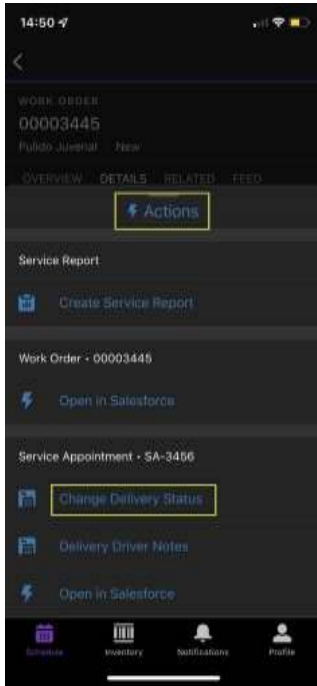
6. Use the “Get Directions” option to connect to Google or Apple Maps



7. To call a client using the app, click the Phone icon under their name.



8. If you have completed a delivery, change the delivery status to 'Completed'. If you were not able to drop off the food to the client's home, change the delivery status to 'Cannot Complete'.



9. If there are any comments that you would like SHFB to know regarding a client or delivery, leave those notes in the 'Driver Notes'.

To access the driver notes. Click on the Service Appointment >> Actions >> Delivery Driver Notes.

Examples of what you can put in the driver notes:

- a. Updated phone number
- b. New gate code
- c. Client wanted to cancel HD
- d. Client Moved—update address
- e. Explain why you were not able to make a delivery

