

Mobile Meals

Introduction

Reduce manual data entry, paperwork, and printing expense with the *ServTracker® Mobile Meals App*. Employees access daily delivery routes on their mobile device, find driving directions to each location, and enter all completion data on a mobile app. Data collected with the app imports back into ServTracker® as verified service units.

Mobile Dashboard provides real-time completion data from the field to supervisory staff, as well as messaging communication within the app.

Overview

- Create Service Units in ServTracker®*

 - Sync to Mobile Meals app*

- Mobile Meals app*

 - Install on mobile device*

 - Login*

 - Route List*

 - Delivery Details*

 - Messaging*

 - Recording Delivery*

 - Change Of Condition*

 - Recording Non-delivery*

 - Submit Route Completion*

- Dashboard*

 - Login*

 - Summary Dashboard*

 - Route Details*

 - Messaging*

 - Stop Detail*

 - Non-delivery Issues*

 - Manage Non-delivery Reasons*

- Import Mobile Data to ServTracker®*

- Post Service Units*

Create Service Units in ServTracker®

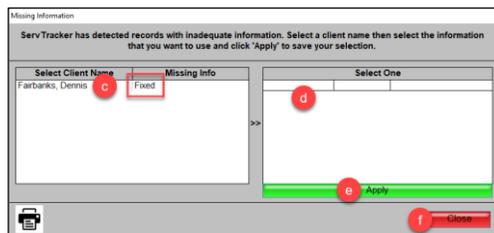
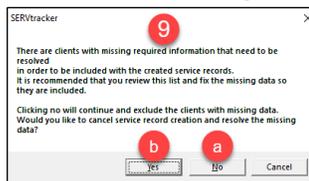
1. From the ServTracker® Main Menu, click **Service Units** button.
2. Select Service: **Home Delivered Meals**.
3. Select **Kitchen** for Viewing.
4. Click **Create Service Units** button.
5. Entry mode: select **From Schedule**.
6. Select **today's date** for each of Period Starting (From) and Period Ending (To) dates.
7. Click **Add Date** button. Date will appear in table, below.
8. Click **Transfer To Service Units** button.



Service Units will then populate the Kitchen view, *unless any of the following conditions are present:*

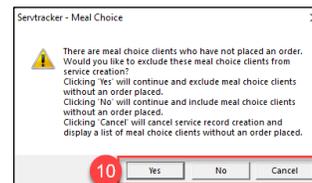
9. Missing Info message may appear if Clients are missing data critical for deliveries.

- a. Click **No** to exclude Clients with missing data.
- b. Clicking **Yes** presents dialog list of Clients' inadequate information.
- c. Select client data row.
- d. Select appropriate **data** from right-side panel.
- e. Click **Apply**, missing Info entry updates to read **Fixed**.
- f. Click **Close** button.



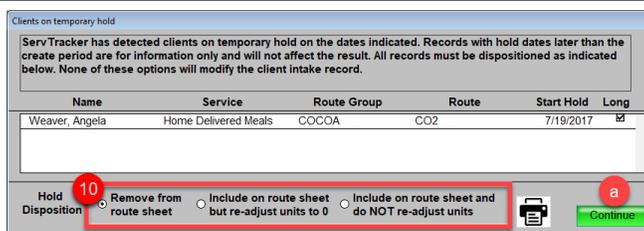
10. Meal Choice message may appear if any Client has not made meal choice.

- a. Click **Yes** to exclude those Clients and continue.
- b. Click **No** to include those Clients without an order and continue.
- c. Click **Cancel** to stop creating Service Units and produce report of Clients without meal choice



11. If any Client is on temporary hold, message appears for choice of Route Sheet disposition. Options include **Remove from route sheet**, **Include but adjust to 0**, or **Include without adjustment**.

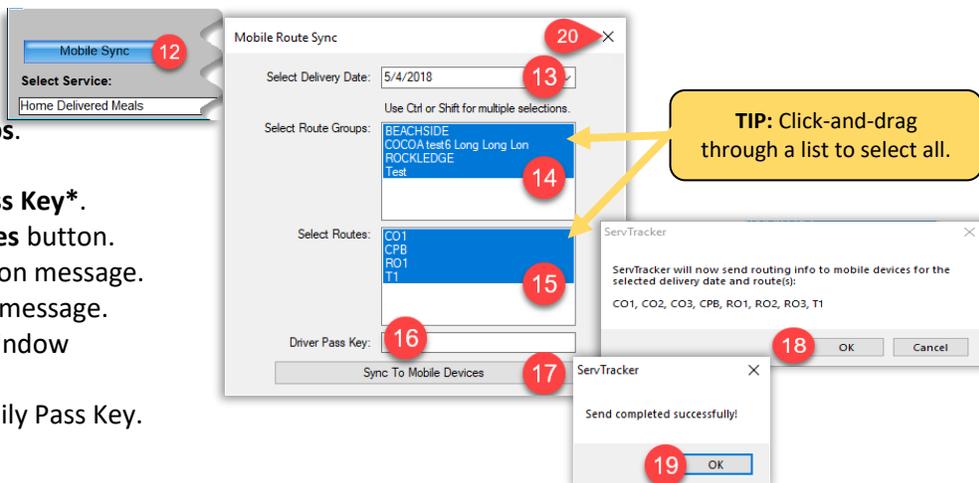
- a. Click **Continue** button.



Sync to Mobile Meals app

12. Click **Mobile Sync** button.
13. Select **Delivery Date**.
14. Select desired **Route Groups**.
15. Select desired **Routes**.
16. Invent and enter **Driver Pass Key***.
17. Click **Sync To Mobile Devices** button.
18. Click **OK** on sync confirmation message.
19. Click **OK** to dismiss success message.
20. **Close** Mobile Route Sync window (top-right X).

* Drivers must be notified of daily Pass Key.



Mobile Meals app

Install on mobile device

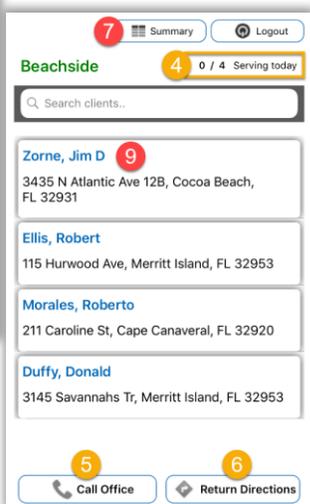
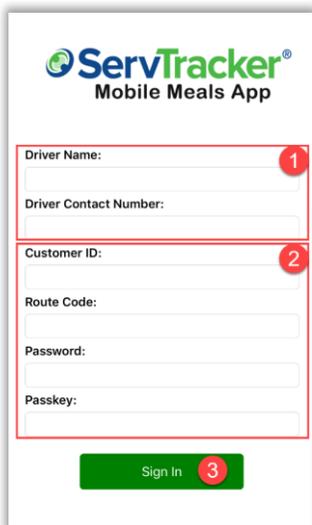


Search, download and install ServTracker® Mobile Meals App from App Store (Apple iOS) or Google Play (Android).

Tap **icon** on mobile device to start app and log in.

Login

1. Driver provides entries for **Driver Name** and **Driver Contact Number**.
2. All other fields provided to driver by Meals Office: **Customer ID, Route Code, Password, Passkey***. *NOTE:* Password default is **driverpass**.
3. Tap **Sign in** button, route list appears.



Route List

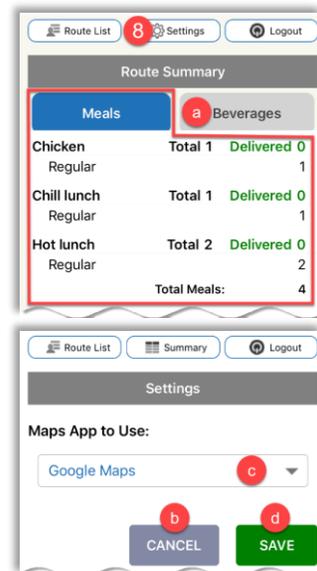
4. **Completion counter** displays completed/total stops.
5. **Call Office** button calls phone number at pickup point.
6. **Return Directions** button opens maps app on device for directions back to pickup point.

Route Summary

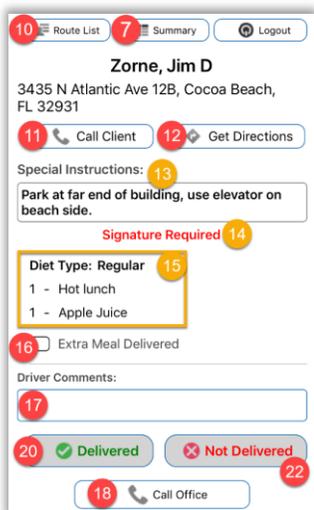
7. Tap **Summary** button at top of screen.
 - a. Pack list of meals displays; beverages list also available.

Settings

8. Tap **Settings** button at top of Summary screen.
 - b. Tap **Cancel** button to close without making changes.
 - c. Tap drop-down list to select **maps app** to use for directions.
 - d. Tap **Save** button.

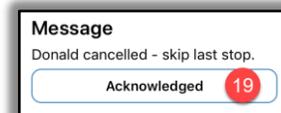


9. Tap **any stop** on list, details for delivery display.



Delivery Details

10. **Route List** button returns to complete list.
11. To phone client named in header, tap **Call Client** button.
12. **Get Directions** button uses maps app on device to direct driver to client address.
13. **Special Instructions** display, if applicable.
14. Funding source may demand **Signature Required**.
15. List of **delivery items** display.
16. Tap switch to indicate **Extra Meal Delivered**.
17. Tap field to enter **driver comments**.
18. Tap **Call Office** to phone pickup point.



Messaging

- Driver may receive a Message pop-up from meals provider office.
19. Read carefully and tap **Acknowledged** to dismiss and continue deliveries.



Recording Delivery

20. Tap **Delivered** button on Delivery Details/Client Information.
21. If required, request **signature** of client named in header.
 - e. Tap square to accept **attestation**.
 - f. Tap **Done** button.

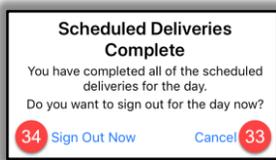
Recording Non-delivery

22. Tap **Not delivered** button on Delivery Details/Client Information to enter reason for non-delivery.
23. Select **No Service reason** from drop-down list.
24. Tap to select one or more **Additional Information**.
25. **Cancel** button returns to previous Delivery Details without recording entries.
26. Tap **Submit** button. Next route stop appears, completion counter advances (#4, above).



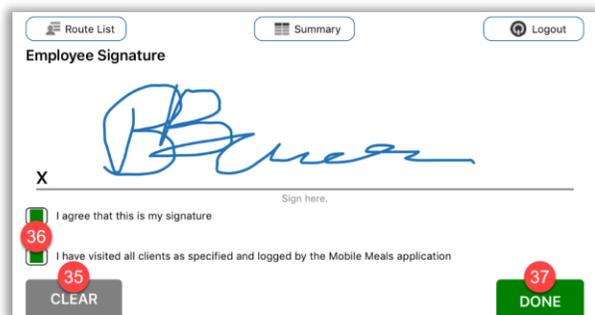
Change Of Condition

27. If no observable change in client, tap **No**.
28. To note a change, tap **Yes**.
29. Tap to select one or more **changes**.
30. Tap to enter **comments**.
31. **Cancel** button returns to previous Delivery Details without recording entries.
32. Tap **Submit** button. Next route stop appears, completion counter advances (#4, above).



Submit Route Completion

33. **Cancel** returns to Route List for edits.
34. **Sign Out Now** for signature screen.
35. **Clear** button resets signature.
36. Tap squares to accept **attestations**.
37. Tap **Done** button.



Dashboard

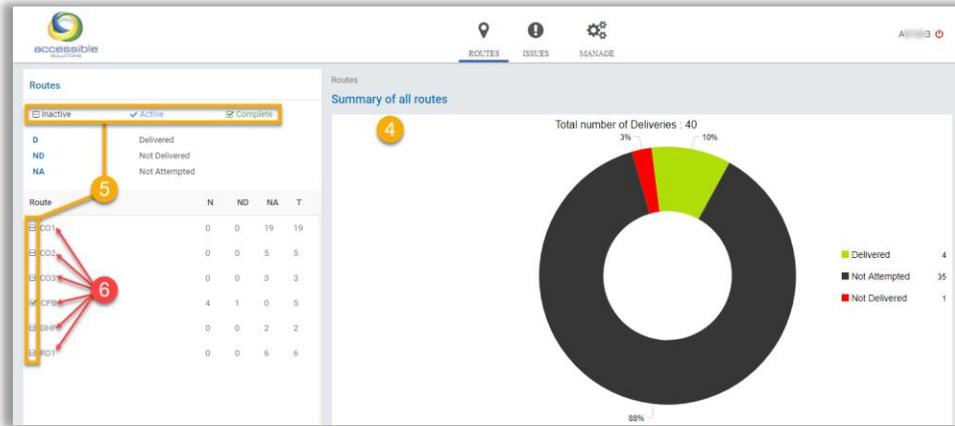
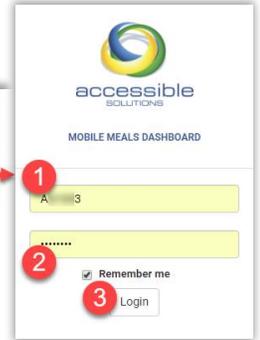
Dashboard will not allow login without completing all steps in the first section of this document. Service Units must be created, and Mobile Sync must be run before Dashboard login is allowed.

Login

To begin, open any web browser and enter the following URL into the address bar:

https://mobilemeals.servtracker.com/dashboard

1. Enter **Customer ID**, found in ServTracker Setup.
2. Enter Password: **dashpass**.
3. Click **Login** button.



Summary Dashboard

4. **Summary** of all deliveries displayed on main panel.
5. Route **status** displays inactive/active/complete. **Legend** appears above.

6. Click **Route nickname** for Route Details.

Route Details

Display only:

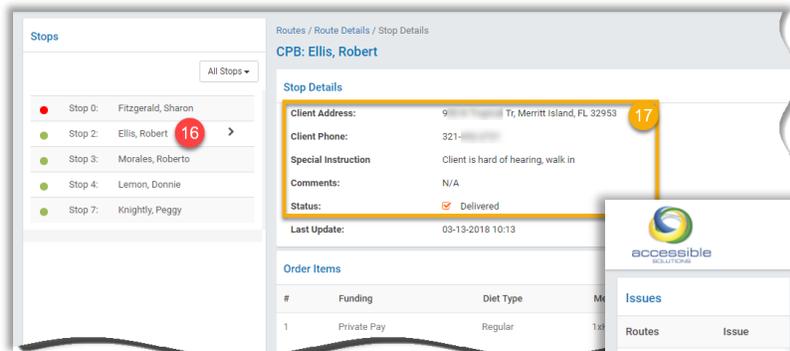
7. **Total stops**.
8. Green **delivered**.
9. Red **undelivered**.
10. Driver's current **GPS location**.

Messaging

11. Click button to **Send message to driver**.
12. Type message to driver.
13. Click Send message button.
14. Messages collected in **list**.

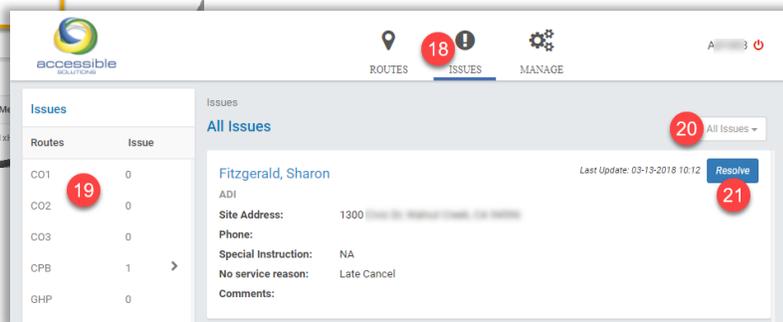
Stop Detail

15. Click  icon to view list of stops (see above).
16. Click **Stop (Client name)** for Stop Details.
17. *Display only:* Client address and phone, Special Instruction, Comments from driver, delivery Status.



Non-delivery Issues

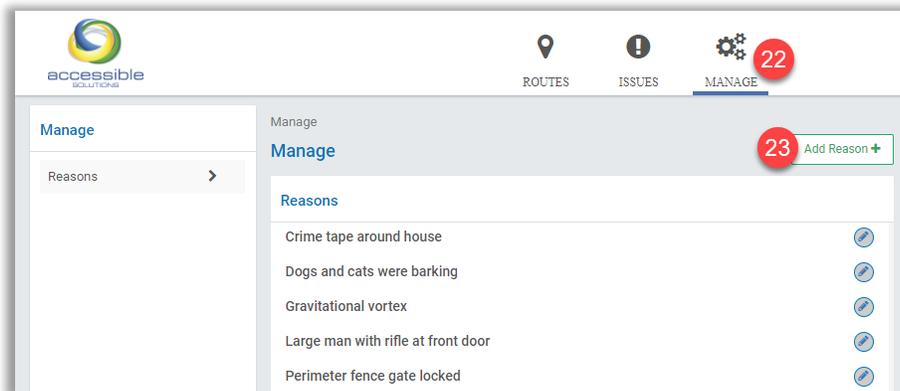
18. Click **Issues** tab (top).
19. Click to select **Route**.
20. Click to **filter** by All/Unresolved/Resolved.
21. Click button to mark as **Resolved**.



Manage Non-delivery Reasons

Other reasons for non-delivery may be managed directly from the Dashboard.

22. Click **Manage** tab (top).
23. Click **Add Reason** button, enter exact wording of reason, and click **Save**.



- New reason will appear in Reasons table on Dashboard, and also display as an option on Mobile Meals app (see #28 in Mobil Meals app section, above).

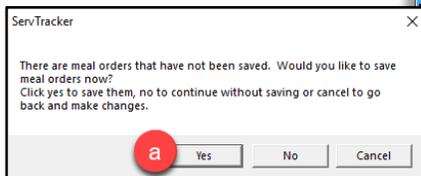
Import Mobile Data to ServTracker®

NOTE: All Drivers must sign off all Routes as *complete*. Importing incomplete routes may cause loss of data.

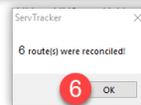
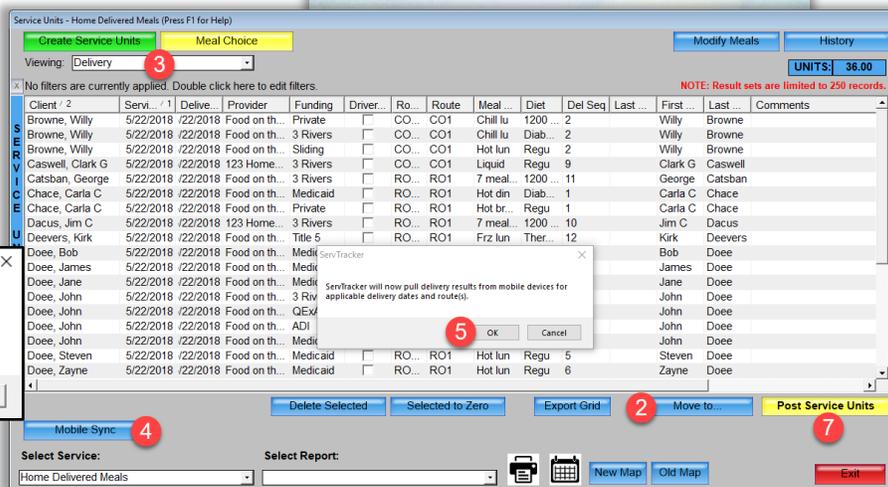
1. Click **Service Units** button on Main Menu.
2. From **Kitchen View**, click **Move to...** button, select Destination: **Delivery** and click **OK**.



- a. Click **Yes** if prompted to save meal order



3. Change to **Delivery View**.
4. Click **Mobile Sync** button.
5. Click **OK** on confirmation message.
6. When import is complete, click **OK** on route count message.



Post Service Units

- *Delivered* route stops import to Service Units as *Verified*, ready to be posted.
 - *Non-delivered* route stops will import to Service Units with an entry in *No Service ID*. These records may be edited (double-click) to adjust **Meal qty** and **Bev qty** to **0** if billing is *not* allowed for No Service.
7. Review all entries for accuracy, then click **Post Service Units** button.