

App Navigation

- [Clocking In and Out](#)
- [Service Technician](#)
- [Fuel Delivery Driver](#)

Clocking In and Out

My Time

- On your iPad or phone, open the **Kozy App**.
 - Sign into your personal account.
 - Go to the orange **My Time** button to clock in.
 - At the top of the screen your name will be listed. Click the blue **Clock In** button to clock in.
 - Underneath is your clock-in history. You can change the week by selecting the listed week in purple.
 - Listed will be your clock in, clock out, hours worked, and break.
 - To take a break, clock out in the same place you clocked in. When your break is over, click **Clock In**.
 - If you forgot to clock in for lunch, click on the date you did not take a break and select **Mark No Lunch**.
 - If you forgot to clock in, contact your office so they can adjust your hours on the back end.
-

Service Technician

Service

- In the app, select **Service**.
- Click the service list icon (top left corner) to view your appointments for the day.
- Next to that is the person with a "+" icon, used to search for a customer if needed.
- The car icon starts your route navigation for the day, beginning with your first appointment.
- The date icon lets you change the date to view future or past appointments.
- For the current day, select the visit list and choose the job you're heading to. Jobs are listed in numerical order, starting with the 1st job.
- Once inside a job, you'll see:
 - A photo of the location
 - The customer's name
 - Directions to the location
 - The ability to call the number on file
 - The account status and current plans
- **Concerns:** lists the reason for the visit.
- **Parts:** lists any parts added by the office needed for this specific job. This doesn't always need to be filled out; it's used for billing purposes.
- Toggle from the **Info** section to **System** to see the systems listed on the account (e.g., boiler, furnace, hot water heater, etc.).
- **Notes:** log what you did and what still needs to be done. The office will see these notes and use them when speaking with the customer.
- **Pictures:** submit photos of your work or anything relevant to the job. Once uploaded, the office can see them immediately.
- When you're ready to begin, select **Start Job** at the bottom:
 - A confirmation warning will appear; select **Yes** to proceed.
 - The screen will show the job as in progress, with a timer in the top right corner.
- When finished, select **End Job**. The job will turn green and be marked complete.
- Return to your visit list and select the next job.
- At the end of the day, clock out the same way you clocked in that morning.

Fuel Delivery Driver

Driver Navigation

- On your iPad or phone, open the **Kozy App**.
- Sign into your personal account.
- Clock in if applicable to your company.
- If making fuel deliveries, select **Fuel**.
- Click the checklist icon (top left) to check in your truck for the day:
 - Note the beginning-of-day miles and end-of-day miles.
 - Toggle on the pretrip items once checked, to confirm the truck is safe to drive.
- The app auto-populates deliveries for the current day. To change the date, click the date box and select a new date.
- Select the car icon to begin route navigation.
- **Pickup** button: use this when picking up fuel from a different vehicle or terminal. You can log the amount of gallons picked up.
- **Transfer** button: works the same way as pickup, for transfers between vehicles.
- Your first stop will show as the first address on the route. Each stop displays:
 - The address
 - Whether it's a will call or active delivery
 - Miles from your current location
 - The type of fuel
- Click the customer's address to open the delivery screen. This shows a photo of the location.
- Check the fill location notes for delivery guidance.
- Check driver alerts as well.
- When you're at the location and ready to pump, confirm the app is connected to the truck's meter:
 - **Connected:** the screen shows **Start** or **Leftover**.
 - **Not connected:** the screen shows **Searching for Connection**.
- Click **Start** to begin the delivery.
- Select the amount of additives, if needed.
- Toggle **Short Delivery** if applicable.
- Add any notes for the office if needed (example: "Deliver from street" or "Could not make delivery, road was blocked").
- Once finished, return to your deliveries list and move on to the next stop.