Deliveries

Introduction

The Deliveries part on the Fuel section of the Customer Account is where Customer Delivery Request can be input when made by the customer and not in Auto Delivery. A history Search and Pricing search can also be made here by clicking on the History or Pricing tabs.

Deliveries

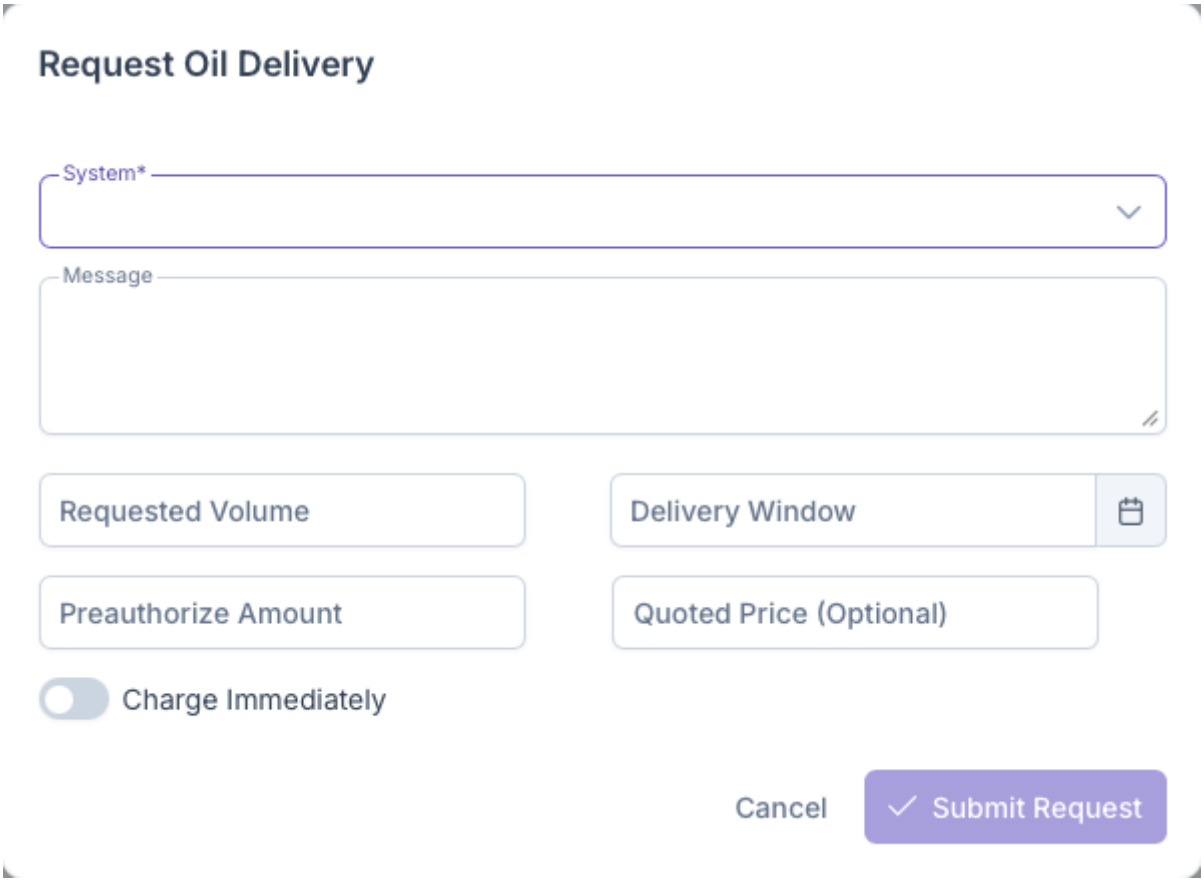
When first seeing this sction, all Fuel Delivery Requests that are made will show up here. They'll show up as line items with the following columns



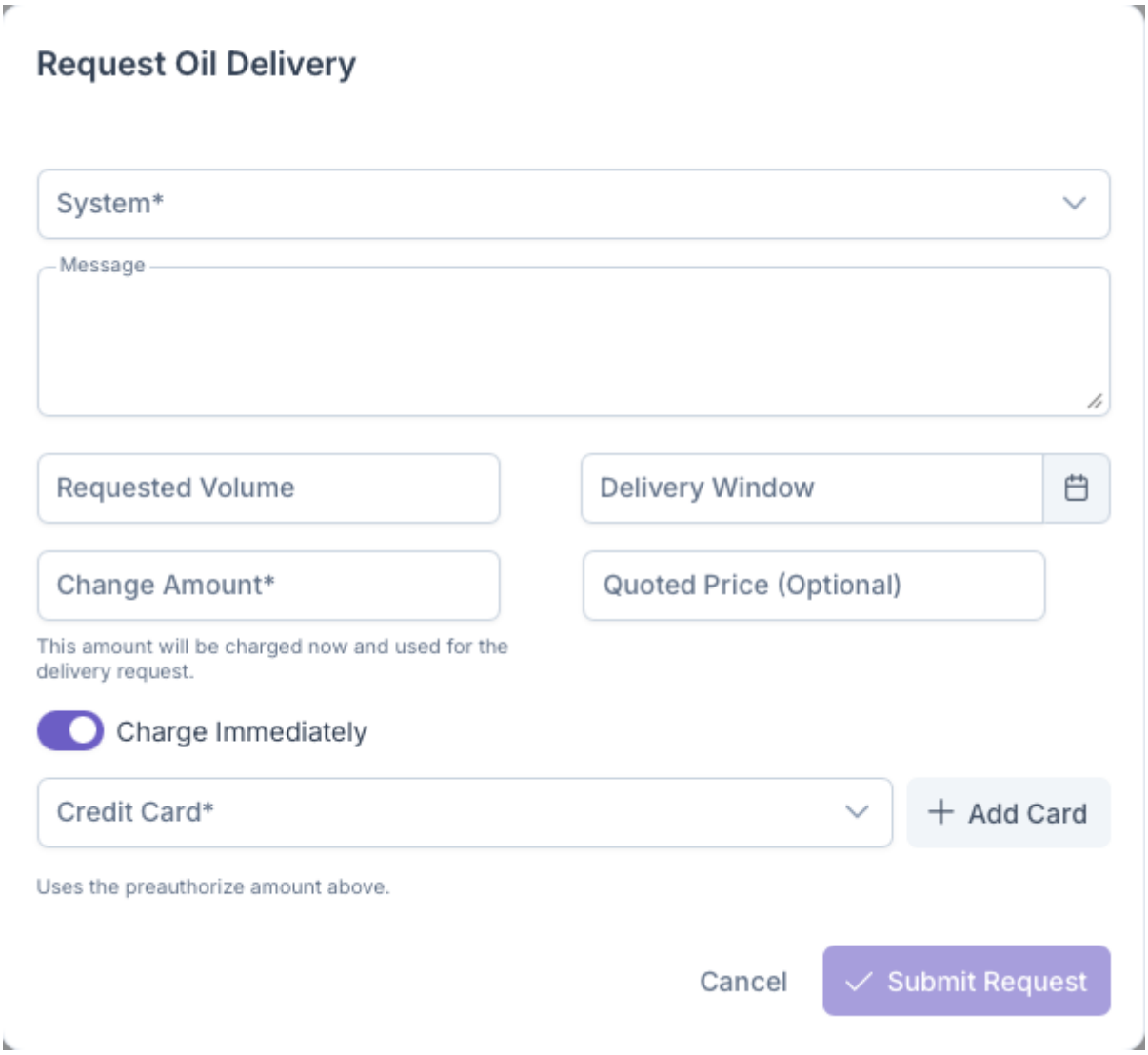
- Date - The date of the requested delivery
- Driver - The Driver selected to delivery the fuel
- Expected - How many gallons are expected to be delivered
- Delivered - How many gallons were delivered
- Price - How much per gallon
- Total - Total amount based on what was delivered
- Status - Shows the status of the request. Clicking on the status will also delete the request if not delivered yet

Delivery Request

Delivery Request for Customers can be made here. By clicking on the +Delivery Request, The Add Deliveries popup will appear and the following fields must be filled out



- System - Select a system the customer has that need a delivery
- Message - Any messages or notes regarding the request
- Requested Volume - How much was requested for Delivery
- Delivery Window - The given date window for a delivery
- Credit Card Hold Amount - The hold placed on the customers card for delivery
- Quoted Price - The price that was quoted for the customer when the delivery was requested
- Charge Card - Toggling here will allow a card to be charged for a delivery request if the customer wants to be charged right away. Toggling this on will expand the menu and now it will also show



- Credit Card - A dropdown that shows all cards that the customer has on file. Selecting one will the charge the card the amount that is placed on hold as shown above
- Add Card - Clicking here will open up the Add Payment Card popup in order to immediately add a card to the customers account if one is not already in the system. See below for more information

Once all fields have been filled out, clicking on Submit Request will create the delivery request and charge the customers card if the customer wanted to have it charged. This will show up partially filled on the Deliveries section and will fill up as the the order is routed, priced and delivered. This request will also show up on the request section of the Setting Up a Route page. Clicking on cancel will close out the window and delete any information filled out

Add Payment Card

If a customer chooses to have a card added to their account to use for a delivery request, the Add Payment Card popup will appear and the following information needs to be filled out

Add Payment Card — #92157 Doe

Enter billing and card details to add a new payment method.

Billing Information

Use Customer Address

First Name*

Last Name*

Company

Email

Phone Number*

Billing Address*

Address Line 2

City*

State*

Zip*

Payment Details

Card Number*

0000 0000 0000 0000

Expiration Date*

00 / 00

CVV*

***

AutoPay Settings

Fuel
Auto-charge for fuel deliveries

Service
Auto-charge for service calls

Service Plan
Auto-charge for service plans

Other
Auto-charge for other charges

Cancel

Add Card

- Billing Information
  - First Name, Last Name
  - Company
  - Email
  - Phone Number
  - Billing Address
  - Billing Address 2
  - City
  - State
  - Zip
- Payment Details
  - Card Number
  - Expiration Date
  - CVV
- AutoPay Settings - Toggle the folowing for automatic payments
  - Fuel
  - Service
  - Serviec Paln
  - Other

History

Clicking on the History tab under Deliveries will bring up the Deliveries History for The Customer. Once brought up, it'll show all systems that the customer has and clicking on each one will bring up a detailed page for that systems delivery history. The page will show details about the following, The system itself, The Usage Rates, Delivery Windows, Delivery Analytics, Rate Configurations and Delivery History. A much more detailed view of this page can be seen on the Delivery History page.

Pricing

Clicking on the Pricing Tab under Deliveries will bring up the Pricing page for deliveries. Once brought up, a system can be selected which will then generate the pricing for that system. The Following information is then displayed, Pricing, Transitions, Services, Contracts, Custom Points and a graph depicting Recent deliveries. A much more in depth look at the pricing page can be seen on the Pricing page.

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