

Making a Delivery Request

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- Go to the customer's account and navigate to the **Systems** tab.
- Confirm that both the boiler and the tank are listed under the system.
- Scroll to **Deliveries** at the bottom and click **Delivery Request**.
- Add a message describing the situation, for example: *"Customer called saying they are at ¼ tank and want a delivery tomorrow."*
- Enter the requested volume.
- Select a delivery window.
- Note the **Preauthorize Amount** and **Charge Immediately** features.
 - **Preauthorize Amount**
This holds a set dollar amount on the customer's card before the delivery happens, rather than charging it immediately. It's typically used to confirm the customer has valid, sufficient payment on file. Once the actual delivery total is known, the final charge is submitted and the hold is released or adjusted to match.
 - **Charge Immediately**
This charges the customer's card at the time the delivery request is created or confirmed, rather than waiting until after delivery. It's typically used when a company wants payment secured up front rather than billed afterward.
- Quote the customer a price based on current rates.

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