Making a Delivery Request

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Use a delivery request to record a customer's will-call, emergency, or specific-volume fuel request so dispatch can review it for routing.

- 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. If Degree Day values are missing, enter the customer's actual winter and summer values.
- Scroll to **Deliveries** at the bottom and click **Delivery Request**. You can also select **Schedule delivery** from the **Tank now** card on the Delivery History page.
- 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. Tap one of the preset windows when your company has set them up. If the company has locked the window, the date picker is disabled and explains why. Days on the company holiday calendar are skipped.
- Note the **Preauthorize Amount** and **Charge Immediately** features. Use either option only when it applies, a valid card is available, and the customer has authorized it.
  - **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, then submit the request. The quote includes only the taxes the invoice will charge.

> **What happens next:** Submitting a request does not route, schedule, or assign the delivery. Dispatch must still add it to routing or staging and assign the load, route, truck, and driver. The request shows who created it: your name, a portal request by the customer, or the system schedule.

If the customer is on a credit hold, a warning appears when you create the delivery. Follow company policy before continuing.

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