

Routing / Fuel Department

- [Pricings Basics / Fuel Assistance](#)
- [Create a Route and Stage the Load](#)
- [Pricing Deliveries](#)
- [Driver Workflow](#)
- [Posting Fuel Invoices](#)
- [Fuel Inventory Overview](#)
- [Quick Reference](#)

Pricings Basics / Fuel Assistance

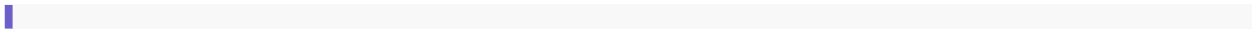
Fuel Pricing Basics

Pricing begins with the selected fuel and pickup terminal. Review the current effective price before building or dispatching the day's routes. A new price entry takes over until the next entry occurs.

Term	What It Means
Terminal	The in-house or third-party location where a truck picks up fuel. Each terminal can carry its own fuel pricing.
Rack price	The fuel cost charged to the company at the selected terminal.
Base cost	The company's per-gallon cost of doing business, such as driver and truck costs, as configured by the company.
Margin constraints	Configured minimum and maximum guardrails used to protect the intended margin.
Special margin	A commercial, wholesale, or other special margin. When used, it replaces the base-cost component rather than being added on top of base cost.
Usage modifier	A company-configured adjustment based on factors such as delivered gallons or tank size, including small-delivery fees or volume discounts.

Fuel Assistance Pricing

- Enter the approved program rate for the applicable date and fuel type.
- Do not create a second customer account solely because the customer receives fuel assistance; the assistance designation is connected to the customer's account.
- Program allotment and remaining assistance are tracked through the vendor area. Amounts owed by the assistance provider are separated from the customer's ordinary balance.



CONFIGURATION NOTE: Exact rates, margins, modifiers, effective dates, and assistance programs are company configured. Only authorized users should change pricing or Admin settings.

Create a Route and Stage the Load

A route identifies the driver and truck. A staged load organizes the pickup and planned stops before the load is assigned to that route.

A. Create the Route

1. Open **Fuel**, then **Routing**.
2. Select the fuel type being routed.
3. Set the routing date for the work being planned.
4. In **Routes**, select the plus action to add a route.
5. Select the appropriate driver.
6. Choose the truck assigned to the route.
7. Save or confirm the route so it is available for load assignment.

B. Create or Select a Staged Load

1. Move to **Staging**.
2. Select the plus action to create a load.
3. Choose the terminal where the load will be picked up. Terminal selection connects the load to the applicable terminal pricing.
4. *(Optional)* Enter the load number for the driver's sequence of pickups that day.
5. Assign the **Route** to the appropriate Driver/Truck.

“ **MULTIPLE PICKUPS:** When a truck must refill during the day, the route may use more than one load. Each load can identify its pickup terminal, which matters when terminal pricing differs.

Add Stops, Assign, and Finalize the Route

Add Delivery Stops

1. Add an individual delivery by selecting the appropriate customer marker and adding it to the active load.
2. To select a geographic group, choose the lasso tool and draw a polygon around the intended stops.
3. Finish the polygon, review the number of customers selected, and confirm the selection.
4. Review customer delivery requests and add the appropriate requests to the active load.
5. Check which requests are already routed and which remain unrouted so no request is assumed complete before assignment.
6. Review the expected gallons against the truck's available capacity and planned pickup sequence.

Assign and Review

1. Assign the staged load to the correct route.
2. Use **Optimize** or **Recalculate Path** to generate a suggested stop order.
3. Review the suggested route. Drag and drop stops when known road conditions, customer timing, or operating needs require a different order.
4. Confirm the fuel type, date, driver, truck, terminal, load number, stops, expected gallons, and pickup plan before moving to delivery pricing.

Routing Term	How to Recognize It
Staged load	A planned pickup and group of stops still being prepared. It is not yet the driver's assigned route.
Assigned route	A route tied to the selected driver and truck, with a staged load assigned for field work.
Routed request	A customer delivery request already placed on a route; the routing screen indicates its routed status.
Unrouted request	A submitted request that has not yet been added to a driver's load or route.

Pricing Deliveries

Review and Price Deliveries

Pricing review normally happens after routing and before the driver leaves. This places the expected price information on the delivery ticket and gives the office a final chance to catch account or quantity issues.

1. Open **Fuel**, then **Deliveries**.
2. Set the correct delivery date or date range.
3. Select the applicable fuel type.
4. Filter by route when it helps isolate the deliveries being reviewed.
5. Select all deliveries for the intended group, or select individual deliveries when only part of the list should be priced.
6. Review customer pricing notes and delivery notes before applying prices.
7. Use **Price Selected** for the selected records.
8. Confirm that the intended deliveries now show the expected pricing status before dispatch.

What to Review on Each Delivery

- Pricing notes, including a quoted price or other customer-specific instruction.
- Fuel assistance, budget, or fuel-contract indicators when present.
- Delivery notes that affect access, safety, placement, or the requested amount.

Quantity Review	Question
Expected gallons	Does the planned amount make sense for the customer and route?
Delivered gallons	After completion, does the entered or metered amount match the delivery record and ticket?
Tank capacity	If delivered gallons exceed capacity, is the tank record wrong or was the delivery amount entered incorrectly?

“ **PRINTABLE RECORDS:** Use **Cover Sheets** for available route cover sheets and **Print Tickets** when the company's physical ticket process requires a printable

PDF. Confirm the date, route, and deliveries first.

Driver Workflow

Driver Workflow and Delivery Exceptions

The mobile workflow connects the assigned load back to office review. Exact options depend on the driver's permissions, the truck, the meter connection, and company procedure.

Typical Driver Flow

1. Open the assigned fuel load and review the listed stops.
2. Complete the required pre-trip, post-trip, vehicle, or safety checklist when configured.
3. Record the fuel pickup (or transfer), including the fuel, gallons, and destination container or compartment.
4. Open the first delivery stop and confirm the location and delivery notes.
5. Complete the delivery through the connected meter when automated (**Start**), or enter the delivered amount when manual entry is permitted (**Start**).
6. Stop (metered) or complete (manual) the delivery, then continue to the next stop.
7. Record an authorized transfer when fuel is moved between approved trucks, containers, or compartments.

When a Stop Cannot Be Completed

1. Skip or reorder the stop when conditions require it and company procedure permits.
2. Record a clear note describing the condition, such as an unsafe or inaccessible driveway, road obstruction, blocked access, or another delivery issue.
3. Attach a photo when the field workflow supports it and documentation is appropriate.
4. Use the available short- or undelivered-delivery process so the office can see that the stop still needs attention.
5. Return to the stop or reschedule it according to the company's dispatcher and driver procedure.



DO NOT LET AN EXCEPTION DISAPPEAR: A skipped stop is not the same as a completed delivery. The driver should document what happened, and the office should confirm whether the stop will be retried, moved, or rescheduled.

Office Handoff

When the driver completes the load, the office reviews completion status, delivered quantities, ticket information, exceptions, pickups, and transfers before creating or posting invoices.

Posting Fuel Invoices

Create and Post Fuel Invoices

1. Return to **Fuel**, then **Deliveries**, and open the completed delivery date or range.
2. Filter by fuel type and/or route when helpful.
3. Confirm delivered gallons, the related ticket information, and any exception notes. Correct supported data issues before billing.
4. Select the completed deliveries and **Mark as Checked**.
5. Open **Billing**, then **Invoices**.
6. Filter by the correct date, fuel, and the fuel-sales invoice subtype configured by your company.
7. Open an individual invoice when detailed review is needed; otherwise select the verified group for bulk processing.
8. Use **Post Selected** to post the approved group. Emails send automatically; you only need to print the ones you mail.
9. Confirm the invoices and payments appear as expected after posting.

“ **AUTOMATIC FUEL PAYMENTS:** When an account is configured for automatic fuel payment, its stored payment method may be charged as the fuel invoice is posted. Existing account credit may reduce the amount charged. Verify the company's payment configuration and confirm the result after posting.

Fuel Inventory Overview

Open **Fuel**, then **Inventory**, to review company-configured fuel inventory. The dashboard can summarize fuel quantities, vehicles, terminals, low-stock information, and scheduled activity.

- **Vehicles and containers:** Review truck capacity, named containers or compartments, fill levels, routes, and recent activity.
- **Pickups:** Drivers can record the fuel type, gallons, and receiving container permitted for the truck.
- **Transfers:** Authorized users can record movement between allowed sources and destinations, including fuel, gallons, date and time, notes, and purge status when applicable.
- **Saddle-tank or truck fueling:** Record the pickup or truck-fueling activity using the container names and workflow configured by the company.
- **History and reports:** *[cut off — what's the rest of this bullet?]*

Quick Reference

Stage	Daily Check
1. Price	Confirm fuel, terminal, current effective price, margins, and applicable customer indicators.
2. Route	Set date and fuel; create the route; assign the correct driver and truck.
3. Stage	Select terminal and load number; add stops and requests; review expected gallons.
4. Finalize	Assign the load; use Optimize or Recalculate Path; manually reorder and perform final dispatch review.
5. Deliver	Complete checklists, pickups, stops, transfers, and exception documentation.
6. Verify	Compare delivered gallons, tickets, tank capacity, notes, and completion status.
7. Bill	Create invoices; filter the correct subtype; review, email, post, and verify payment results.
8. Reconcile	Review truck fill levels, containers, transfers, history, and inventory reports.

Common Mistakes to Avoid

- Using the wrong fuel type, route date, driver, truck, terminal, or load number.
- Customer needs to have a tank for the appropriate fuel type.
- Assigning a staged load before reviewing its stops and expected gallons.
- Treating a staged load as though it is already assigned to a driver.
- Leaving a submitted customer request unrouted.
- Pricing the wrong selection or failing to review pricing before dispatch.
- Ignoring customer pricing notes, delivery notes, or assistance, budget, contract, and promotion indicators.
- Posting invoices before confirming delivered gallons and ticket information.
- Failing to investigate delivered gallons that exceed recorded tank capacity.
- Using a demo-specific invoice subtype instead of the subtype configured by the company.
- Letting a skipped or undelivered stop go undocumented or unassigned for follow-up.

“ **FINAL CHECK:** After every major action (assign, price, complete, create, post, or transfer), open the next screen in the workflow and confirm the record moved

forward correctly.