Routing / Fuel Department

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Pricings Basics / Fuel Assistance

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.

Update the Daily Rack Price

1. Open **Fuel**, then **Prices**.
2. Select the terminal you are updating. A child terminal that posts its own prices has its own tab.
3. Enter the day's rack price for each fuel at that terminal.
4. Save the entry. The new price takes effect and stays in place until the next price entry.
5. Repeat for each terminal your trucks pick up from that day.

> **Daily task:** Once KozyOps staff set up your margins, base cost, and pricing rules during implementation, the rack price is the only value you need to update each day.

Terminals and Price Charts

- A child terminal that posts its own prices has its own tab and price chart on the Pricing screen. A banner explains which terminals price off which chart.
- The pricing terminal picker lists child terminals under their rack, with the latest posted price, its date, a trend line, how many systems are pinned to it, and a warning when a terminal has stopped posting.
- A specific system can be priced off a different terminal than its default.
- Price fields show at least two decimal places, so a whole-dollar price reads $2.00, and carry up to four decimals where a rate needs them.

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.
- **Settings, Fuel Assistance Agencies** opens on totals across active agencies and a searchable agency list. Each program has its own card.
- Each program carries a **Covers surcharges** switch, so an assistance payment can also cover a fee such as hazmat. Staff can still change it on a single invoice from the Surcharges tab. A program change updates that program's unposted invoices; roll a posted invoice back first if it should change.
- Fuel assistance screens and settings need their own permissions. Without them, the section is hidden.

Fuel Contracts, Budgets, and Taxes

- A fuel contract proposal requires an enrollment fee, price, price range, and gallons before it can be saved.
- The **Contract Obligations** report shows gallons committed, delivered, and still owed for each product and brand, and whether each product is on pace to reach its minimum take. Set the minimum take percentage your contracts actually use.
- When a budget plan is created or renewed, a slider sets how much of the customer's leftover wallet balance carries onto the new plan.
- Tax rates are dated. A delivery is taxed at the rate in effect on its bill date, and a discount lowers the tax on the line it came off.
- The delivery request calculator quotes only the taxes the invoice will actually charge, and per-gallon taxes are calculated on gallons.

> **Configuration note:** Exact rates, margins, modifiers, effective dates, tax order, 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. The truck list shows only trucks that can carry the selected fuel.
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. The lasso's edit button changes the dot size and color on a busy map.
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.

Selecting a stop on the map shows the tank monitor's status in plain words (Reporting, No Signal, Not Installed), a fill-level bar, the customer's name and address, and router, office, system, and delivery-request notes. The map opens on the degree day of the busiest zone on screen.

Reading the Routing Map

Each stop on the routing map is a pin. The pin's color shows the tank level, its shape shows why the stop is on the map, and its rim shows timing. Tank level comes from a degree-day estimate, or a tank monitor reading from the last 3 days. Open the **Map Legend** on the routing map to see this key on screen.

	Tank level (color)	What it means
	**Early Delivery**	The tank can take a delivery, but it is early.
	**Ready for Delivery**	The tank is ready for its delivery.
	**Past Optimum Delivery**	The tank is past its best delivery point.
	**Runout Within 4 Days**	The tank is projected to run out within 4 days.
	**Runout Imminent**	The tank is projected to run out very soon.
	**No Level Estimate**	No usage rate and no fresh monitor reading.

	Shape	Why it is on the map
	**Usage Forecast**	Degree days or the tank monitor say it is time.
	**Scheduled Delivery**	From a calendar schedule.
	**Requested Delivery**	A customer or office request.

	**Scheduled Route**	On a route that repeats with the same stops.
	**Fleet**	Trucks or equipment fueled where they are parked.
	**Stop Number**	The stop's order on the selected load.

	Rim	Timing
	Due	Inside its promised window.
	**Late**	Past its promised date. The tab counts the days late.

Route status replaces the tank color on the pin. A late rim still shows.

	Route status	What it means
	**Routed for Date**	On a route for the selected date.
	**On Future Route**	On a route for a later date.
	**Delivered**	The delivery is complete.
	**Never Received Full Delivery**	No full delivery is on record for this tank.
	**New Customer**	A new customer account.

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.
Scheduled route	A route template that repeats the same stops on a set cadence.

Generate Routes

- **Generate Routes** builds proposed routes for the day. Review opens with every proposed route on one map, each truck in its own color with its load and stop counts. Click a truck in the legend to focus on it.
- Route planning needs its own permission.
- Route optimizer settings, such as vehicle type, tolls and highways to avoid, time per stop, terminal load time, and shift length, live under **Settings, Routing** and are managed by an administrator.
- A fuel that no routing depot supplies still plans at its own terminals.

Scheduled Repeating Routes

1. Build a good route, then select **Repeat this route** on the routing board. The editor opens filled in from that route.
2. Set the cadence: days of the week, every how many weeks, a start date, an optional end date, and any dates to skip. Review the preview of the next runs.
3. Save the template. Templates can be paused, resumed, deleted, and restored from the **Scheduled routes** screen.
4. When a scheduled run is missing stops, the board shows a count beside the route. Select **Add missing** and read the list of stops it could not place and why, such as no open delivery, a hold, or a different fuel.

Delivery Requests

- The delivery request dialog offers one-tap delivery window presets set in Settings. When the company has locked the window, the date picker explains why.
- Each request shows who created it: an employee, a portal request by the customer, or the system schedule.
- Delivery-day calculations skip the dates on the company holiday calendar.
- A missed scheduled delivery inside a season that is still open stays due now instead of jumping to the next season.

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, and the brand when the company runs more than one.
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.

Reading the Deliveries Board

- Tickets are grouped under the route that carries them. Each route row has **Driver report**, **Cover sheet**, **Print tickets**, and **Select route**.
- The load bar across the top shows the day by delivery stage. Click a stage, such as Short, to filter the table to it; click again to clear.
- Use the gear to choose columns. Customer, Price, Delivered, and Actions always stay on.
- On a phone or narrow window, each row becomes a card.

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.
- Credit holds. The holds report's **Target Delivery** column shows which blocked delivery comes due first.

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. Cover sheets print the driver's signed pre-trip and post-trip inspections.

Card Preauthorization Holds

1. Select the card button on a ticket, or select tickets and choose **Preauthorize Selected**.
2. Choose the hold amount: **Full tank**, **Requested** (or **Estimated** when there is no customer request), **Requested plus** a dollar amount that starts at $50, or an exact amount on one ticket.
3. Submit. A held ticket's card button turns green and shows the amount.
4. To end a hold, open the ticket and choose **Release** or **Collect as account credit**.

Tell Customers Their Delivery Is Routed

- Send a routed notice by text, email, or both from a ticket's **More** menu, or for a selection from the footer. The dialog shows who each channel can reach and why anyone cannot.
- A notified ticket shows "Told" with the date. If it moves to another day, the chip turns amber and the menu offers **Resend**.
- Drivers' apps send an "on the way" text when a driver sets off for a stop. Customers who opted out of texts in the portal are never texted.
- Send to one ticket first and read the eligibility list before sending to a whole route.

Tank Levels and Adjustments

- One tank calculation drives the customer dashboard, the routing map, and route planning, so their figures agree.
- Only an installed tank monitor read in the last three days counts as the tank level.
- When a tank is checked or filled by someone else, record a **Tank Level Adjustment** from the Systems tab or Delivery History. Set the level in gallons or percent, and turn on **Someone else delivered fuel** to record outside gallons. Nothing is billed or taken from inventory, and the forecast updates from the new level.
- The **Delivery History** page leads with Tank now, Usage rates, and Last 12 months cards. Rate columns are behind a **Rate details** toggle.
- The **System Delivery Issues** report lists every fuel system that cannot be delivered, forecast, or billed, grouped as Blockers, Degraded, or Warnings.

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. Routes are saved on the device, and the date picker shows a calendar with a dot on each day that has a route.
2. Complete the signed pre-trip inspection when configured: mark each item OK, defect, or N/A, sign, and set the safe-to-drive time.
3. Record the fuel pickup (or transfer), including the fuel, gallons, and destination container or compartment. On a multi-compartment truck, choose the source compartment or leave it on Automatic.
4. Open the first delivery stop and confirm the location and delivery notes. The app warns when you start more than about 0.8 mile from the delivery address.
5. Complete the delivery through the connected meter when automated (**Start**), or tap **Gallons** to enter the delivered amount when the truck has no meter or manual entry is allowed.
6. Add any extras for the stop, such as a surcharge, tank additive, or equipment restart. Each extra is its own line on the ticket and invoice.
7. Stop (metered) or complete (manual) the delivery in the **Complete Delivery** sheet, which shows the amount due and driver feedback, then continue to the next stop.
8. Record an authorized transfer when fuel is moved between approved trucks, containers, or compartments.
9. Complete the signed post-trip inspection at the end of the route.

Meters, Tickets, and Drive Mode

- The meter screen shows the connection, the preset, gallons as they pump, and a final confirmation of gallons delivered and whether the ticket printed.
- When the meter cannot start, the app names the problem and the next step, such as setting the switch to STOP or RUN, a printer out of paper, or a meter not linked to this truck.
- A register can print 1 to 5 copies of each ticket. A ticket can be reprinted from the delivery card on the meter or a Bluetooth printer.
- Drive Mode speaks turn-by-turn directions with a chime at each turn, including with the screen locked.
- Drivers can send diagnostics to support from **Settings, Support, Send Diagnostics**.

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 **Mark Leftover** and pick a reason, or **Mark Short Delivery** with the gallons short, 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, transfers, and inspections before creating or posting invoices.

- A stop where the driver pumped several meter sales bills the total of all of them.
- Marking a stop **Pending** or **Leftover** asks where the gallons went: billed at that stop, moved to another open stop with the same fuel, back on the truck, written off to a sink, or Decide later. Gallons nobody places go to the truck's **Unplaced** sink, and the driver report lists every sale no stop bills.
- Marking a stop Pending reopens it on the driver's app.
- The check-in page shows a banner for deliveries that fell behind its date range, with a button to reach them. Check-in is what bills a delivery.

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, brand, 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**. If invoice creation fails, use **Retry invoice**; undoing a check-in is in the **More** menu.
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. Posting recalculates each invoice first and refuses any invoice dated after today. Emails send automatically; you only need to print the ones you mail.
9. Confirm the invoices and payments appear as expected after posting.

- Printing runs as a background job with a progress dialog and downloads one combined PDF.
- The **Email** and **Mail** columns on the invoice list show who still needs a bill. Filter them by needs, sent, or optional.
- Inactive taxes and surcharges never print on a ticket or reach an invoice. Truck tickets and invoices calculate tax the same way.
- A posted fuel invoice can be rolled back past a stop that has no gallons and no load.

> **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. Release or collect any card hold left from preauthorization. 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.
- **Sinks:** Set up write-off sinks under **Fuel Inventory, Sinks** for spillage, meter tests, and company use before drivers need them.
- **History and reports:** Use transfer history and inventory reports to review movement and investigate differences. Fuel inventory reports export to CSV.
- **Fuel Inventory Reconciliation:** On the End of Month Fuel tab, every gallon out of company tanks and trucks is matched to the invoice that billed it. Read the unbilled and shrinkage rows first.
- **Pump Sales:** Pump-controller exports are imported under **Settings, Fuel, Pump Sales**.
- **Metered systems:** Meter readings sync on their own, and a billing run creates invoices as of a chosen date.

Quick Reference

STAGE	DAILY CHECK
1. Price	Enter today's rack price for each terminal under Fuel, Prices. Confirm fuel, terminal, current effective price, margins, and applicable customer indicators.
2. Route	Set date and fuel; create the route or run Generate Routes; assign the correct driver and truck.
3. Stage	Select terminal and load number; add stops and requests; use Add missing on scheduled routes; review expected gallons.
4. Finalize	Assign the load; use Optimize or Recalculate Path; manually reorder and perform final dispatch review.
5. Prepare	Price deliveries, place card holds, and send routed notices.
6. Deliver	Complete inspections, pickups, stops, extras, transfers, and exception documentation.
7. Verify	Compare delivered gallons, tickets, tank capacity, notes, and completion status. Place every Pending or Leftover meter sale.
8. Bill	Check in; create invoices; filter the correct subtype; review, email, post, and verify payment results.
9. Reconcile	Review truck fill levels, containers, transfers, sinks, 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.
- Leaving meter sales on Decide later or in the Unplaced sink.
- Leaving a card hold in place after the delivery is billed.

- Recording an outside delivery as a company delivery instead of a Tank Level Adjustment.

> **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.