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.

Revision #2
Created 2026-09-09 13:15:34 UTC by Kozy Operations
Updated 2026-11-03 22:20:20 UTC by Kozy Operations