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.

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