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.

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