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.

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