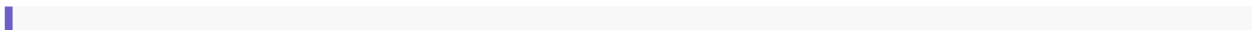


Quick Reference

Stage	Daily Check
1. Price	Confirm fuel, terminal, current effective price, margins, and applicable customer indicators.
2. Route	Set date and fuel; create the route; assign the correct driver and truck.
3. Stage	Select terminal and load number; add stops and requests; review expected gallons.
4. Finalize	Assign the load; use Optimize or Recalculate Path; manually reorder and perform final dispatch review.
5. Deliver	Complete checklists, pickups, stops, transfers, and exception documentation.
6. Verify	Compare delivered gallons, tickets, tank capacity, notes, and completion status.
7. Bill	Create invoices; filter the correct subtype; review, email, post, and verify payment results.
8. Reconcile	Review truck fill levels, containers, transfers, 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.



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.

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