Creating a Fuel Contract

2. Creating a Fuel Contract (Fixed / Capped Rate)

1. In the customer's account, go to the **Service** tab.
2. Select the **+ New Proposal** button.
3. Click **Fuel Contract**.
4. Select the fuel the customer is looking to get a contract for (e.g., Oil).
5. Select the price mode or contract they are looking for (e.g., Fixed Rate, Price Protection).
6. Type in the locked price and number of gallons.
7. Select the contract term you want the contract to be active for.
8. Enter the enrollment fee. The field is required; enter $0 when there is no fee. Price, price range, and gallons are also required before the proposal can be saved.
9. Add in the offer expiration.
10. Select a template if you have a specific one for your company that you'd like the customer to see when reviewing the fuel contract.
11. When finished, select **Preview**.
12. Review the information to ensure it is correct.
13. Click **Create Fuel Contract Proposal**.
14. Open the proposal.
15. From this screen you can:
    - Edit the contract if needed.
    - Email the PDF to the customer.
    - Create your own PDF.
    - Hide this contract from the customer's portal.
16. As with quotes, there is an option to record the signature for the customer if they are unable to sign on their end (no email or computer access).

> **Note:** To get back to this page once you leave it, go to **Service** in the customer's account and move from **Projects** to **Proposals**, then select the one you'd like to open.

Editing a Fuel Contract Proposal

- Draft and pending fuel contract proposals can be edited: price, volume, term, and fees. Select **Recalculate** to preview the new total before saving.
- Once a contract is signed, its terms are locked.
- Volume can be a fixed number of gallons, or the customer's prior-year gallons pulled automatically. The term can be fixed or have no end date.
- To create offers for many customers at once, use the bulk fuel contract proposal screen in the Quotes section of the Billing menu.
- The **Contract Obligations** report shows gallons committed, delivered, and still owed for each product.

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