

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. Add in an enrollment fee, if applicable.
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.