VERTRAX

MULTI-FUEL DISTRIBUTION SOFTWARE

Fuel Distribution ERP Evaluation Checklist

Selecting the system that runs a fuel distributorship is one of the most consequential technology decisions the business will make.

Rather than comparing long feature lists, evaluate how well each vendor handles every fuel you sell, every way you deliver it, and the pricing and margin work in between — then how the financials, the platform, and the relationship hold up as you grow.

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Use this checklist to compare ERP vendors across seven key evaluation categories.

01 Multi-Fuel & Multi-Model Operations

02 Pricing, Cost & Margin Control

03 Dispatch, Delivery & Field Operations

04 Core Financials & Back Office

05 User Experience, AI & Automation

06 Technology, Platform & Extensibility

07 Value, Support & Long-Term Success

Score each capability High, Medium, or Low against how your operation runs today, then check which vendors deliver it in the product — not on a roadmap.

Multi-Fuel & Multi-Model Operations

Does the system run every fuel you sell and every way you deliver it — at the same time?

Feature	Benefit	Priority	VERTRAX		
Multi-Product Catalog	Sell distillates, propane, gasoline, kerosene, lubricants, and packaged goods from one item master.		✓	☐	☐
Concurrent Delivery Models	Run will-call, automatic, calendar, metered, fleet fueling, card lock, cylinder exchange, and bulk transport together.		✓	☐	☐
Flexible Units of Measure	Convert imperial and metric automatically and handle variable-weight items without manual recalculation.		✓	☐	☐
Multi-Product Locations	Track independent pricing, tanks, and capacity for each product at a single customer site.		✓	☐	☐
Customer & Location Management	Give service staff locations, tanks, delivery type, pricing, balances, orders, and open invoices on one dashboard.		✓	☐	☐
Equipment & Inspections	Record appliances, equipment, and inspection history at each location for service and compliance.		✓	☐	☐
Customer-Owned Inventory	Support haul-only work where you move product you never take title to.		✓	☐	☐
Branded Product Controls	Stop the wrong fuel from being sold against a branded supply agreement.		✓	☐	☐
Card Lock & Fleet Fueling	Import unattended card lock transactions on a schedule and invoice fleet cards against the right account and price plan.		✓	☐	☐
Budget & Prepay Plans	Run budget billing, prepaid gallons, and installment plans with balances reconciled to the general ledger.		✓	☐	☐
Tank & Asset Ownership	Track company-owned and customer-owned tanks, meters, and cylinders with rent, lease, and exchange billing.		✓	☐	☐

Pricing, Cost & Margin Control

Can finance control price and cost the moment the rack moves — or does the afternoon ship at the morning's cost?

Feature	Benefit	Priority	VERTRAX		
Automated Rack Feeds	Import DTN, OPIS, and Axxis price feeds on a schedule instead of keying cost in by hand.		✓	☐	☐
Landed Cost & Cost-Plus	Fold freight, duty, tariffs, and fees into product cost so cost-plus starts from the real number.		✓	☐	☐
Layered Pricing Mechanisms	Modify a base rate with price adjustments, plus and discount codes, and price codes.		✓	☐	☐
Contextual Pricing Overrides	Override by customer price class, vendor purchase point, break quantity, or warehouse and bulk plant.		✓	☐	☐
Capped & Volume Price Plans	Hold a rate to a contract end date, or until delivered gallons run out — whichever comes first.		✓	☐	☐
Intraday Price Push	Send revised pricing to the field mid-day so a 2pm delivery does not ship at the 8am rate.		✓	☐	☐
Surcharge & Notice Automation	Apply freight and fuel surcharges to every order and send price change notices by product and schedule.		✓	☐	☐
Real-Time Margin Reporting	See margin by product, location, customer, and business line without waiting for the close.		✓	☐	☐
Fuel Tax & Fee Handling	Apply federal, state, and local fuel taxes, environmental fees, and exemption certificates by jurisdiction and product.		✓	☐	☐
Contract & Fixed-Price Commitments	Track fixed-price and index-based supply contracts against delivered volume so committed gallons and exposure stay visible.		✓	☐	☐

Dispatch, Delivery & Field Operations

Is delivery logistics part of the ERP, or one more system to integrate and reconcile?

Feature	Benefit	Priority	VERTRAX		
Native Dispatch Board	Plan shifts, loads, and stops inside the same product as the financials, with no integration to maintain.		✓	☐	☐
Optimized Routing	Route on load count, start and end locations, stop sequence, and HazMat road restrictions.		✓	☐	☐
Same-Day Route Edits	Handle the exceptions that define a real operating day without rebuilding the shift.		✓	☐	☐
Driver Mobile App	Give drivers directions, site access notes, pump and meter control, digital tickets, and signature capture.		✓	☐	☐
Delivery Write-Back	Return actual gallons, meter readings, truck, driver, and bill of lading to the order with nothing keyed twice.		✓	☐	☐
Tank Telemetry & Forecasting	Generate orders from monitored tank levels and degree-day forecasting to cut run-outs and emergency runs.		✓	☐	☐
Field Service Management	Schedule technicians for oil, propane, and HVAC work with appointment status live back to the office.		✓	☐	☐
Notifications & Customer Portal	Automate delivery and price notices by text and email, and give customers usage, invoices, and payments online.		✓	☐	☐
Redesigned Calendar Board	Drag-and-drop appointment scheduling with map views and filters that match the right technician by qualification and service area.		✓	☐	☐
Integrated Labor Timers	Clock technicians in and out of tasks from the web or offline in the field, feeding payroll and job costing directly.		✓	☐	☐

Core Financials & Back Office

Will the financials hold up as the business adds fuels, locations, and acquisitions?

Feature	Benefit	Priority	VERTRAX		
Financial Management	Run general ledger, AP, AR, cash management, fixed assets, tax, and payroll on one ledger.		✓	☐	☐
AP Automation	Capture supplier invoices with AI document recognition, route approvals, and pay without rekeying.		✓	☐	☐
Bank Feeds & Reconciliation	Pull bank and card transactions automatically, including BAI2 statement formats, and match them to entries.		✓	☐	☐
Cash Management	Monitor balances, transfers, and cash position across accounts, branches, and bulk plant locations.		✓	☐	☐
Tax Management	Calculate and file sales, use, and VAT obligations, with Avalara and Vertex integration for inclusive and exclusive pricing.		✓	☐	☐
Multicurrency	Transact, revalue, and report in multiple currencies for cross-border supply and Canadian operations.		✓	☐	☐
Payroll	Run in-house payroll with union dues, PTO banks, multi-entity EINs, and detailed pay stub reporting.		✓	☐	☐
Fixed Assets	Track trucks, tanks, meters, and plant equipment with depreciation schedules tied to the ledger.		✓	☐	☐
Same-Day Invoicing	Invoice the day product moves instead of at the end of the week, and shorten days sales outstanding.		✓	☐	☐
Reconciliation at Volume	Reconcile field deliveries against back-office orders in bulk, so month-end takes days and not weeks.		✓	☐	☐
Multi-Entity & Intercompany	Consolidate acquired companies, branches, and currencies instead of reconciling a separate legacy system.		✓	☐	☐
Inventory & Truck Warehouses	Value stock across terminals, bulk plants, and truck-level warehouses that show what actually left the yard.		✓	☐	☐
Purchasing & Supply	Manage terminal lifts, bulk transport purchases, approvals, and receiving against the supply plan.		✓	☐	☐
CRM & Account Management	Track quotes, contract pricing, and win/loss next to the customer's delivery and service history.		✓	☐	☐

User Experience, AI & Automation

How quickly will the office, the dispatch desk, and the truck actually adopt it?

Feature	Benefit	Priority	VERTRAX		
Role-Based Experience	Give owners, finance, customer service, dispatch, drivers, and technicians screens built for their work.		✓	☐	☐
Personalized Dashboards	Adapt dashboards, workspaces, search, and analytics to the individual role rather than one generic home page.		✓	☐	☐
Mobile Productivity	Work securely from any browser or device — the back office, the plant, or the cab.		✓	☐	☐
Workflow Automation	Trigger approvals, credit holds, alerts, and notifications automatically when conditions occur.		✓	☐	☐
AI-Ready Platform	The platform has a defined AI strategy and roadmap, with native AI capabilities built in.		✓	☐	☐
AI Document Processing	Reduce manual entry with intelligent capture of supplier invoices and delivery paperwork.		✓	☐	☐
Reporting & Excel Integration	Get real-time visibility through dashboards, reports, and live spreadsheet data instead of exports.		✓	☐	☐
Document Management	Keep bills of lading, contracts, inspections, and signed tickets attached to the record they belong to.		✓	☐	☐
Personalized Workspaces	Each role gets its own workspace, favorites, saved filters, and dashboard permissions down to the individual login.		✓	☐	☐
Education & Community	Acumatica Summit, Open University courses, the Acumatica Community, regional user groups, and extensive in-product help.		✓	☐	☐

Technology, Platform & Extensibility

Can the platform change as fast as the business does — without a developer and an upgrade weekend?

Feature	Benefit	Priority	VERTRAX		
Cloud-Native Architecture	Run true multi-tenant cloud on AWS — not a hosted on-premises product — with no servers to maintain.		✓	☐	☐
Security & Business Continuity	Expect enterprise-grade security, automated backup, high availability, and multi-zone failover.		✓	☐	☐
Low-Code / No-Code Change	Change a screen, add a field, or alter an approval yourself without custom development.		✓	☐	☐
Open REST & SOAP APIs	Connect specialized tools and data with modern, documented, non-proprietary standards.		✓	☐	☐
Scheduled Import Scenarios	Automate price feeds, card lock transactions, and external data loads on a schedule.		✓	☐	☐
Connected Applications	Integrate tank telemetry, fleet telematics, card and ACH payments, and business intelligence tools.		✓	☐	☐
Role-Based Security	Control access centrally across office, field, and portal users, with an audit trail finance can trust.		✓	☐	☐
Scalable Growth Path	Add fuels, locations, trucks, and entities without adding operational or IT complexity.		✓	☐	☐
Modern UI	A refreshed interface with faster response, responsive web and mobile layouts, quick filters that cut search time, drag-and-drop screen personalization, WYSIWYG screen design, and user-defined fields without code.		✓	☐	☐
Business Events	Trigger emails, alerts, and actions from data conditions, with email preview and synchronous processing.		✓	☐	☐
DeviceHub	Connect scales, scanners, and printers — including automated package weight capture during shipping.		✓	☐	☐
Acumatica Marketplace	Extend the platform with vetted ISV solutions instead of custom one-off development.		✓	☐	☐

Value, Support & Long-Term Success

What does the cost and the relationship look like three years after go-live?

Feature	Benefit	Priority	VERTRAX		
Transparent Licensing	Know exactly what drives cost. Vertrax Energy is licensed by users and trucks, so the subscription scales with the operation.		✓	☐	☐
Total Cost of Ownership	Compare lifecycle cost when one platform replaces separate accounting, dispatch, and bolt-on systems.		✓	☐	☐
One Vendor, One Number	Hold one vendor accountable for the ERP, the dispatch board, and the mobile apps.		✓	☐	☐
Fuel-Industry Implementation	Work with project managers and engineers who come from fuel distribution, not from generic ERP.		✓	☐	☐
Legacy Migration Path	Move off legacy and sunsetting platforms with phased cutover and up to two years of transaction history.		✓	☐	☐
Role-Based Training	Train back office, customer service, accounting, dispatch, drivers, and technicians for their own work.		✓	☐	☐
Predictable Release Path	Plan around a predictable annual release cadence and a roadmap shaped by what distributors ask for.		✓	☐	☐
Investment Protection	Build on Acumatica's platform, serving more than 10,000 businesses worldwide, with continued investment behind it.		✓	☐	☐

Turn the scores into a decision

STEP 01

Set priority before the demo

Score every line High, Medium, or Low against how your operation runs today — with operations and finance in the room together.

STEP 02

Make vendors show the highs

Check a vendor's box only when the capability is demonstrated in the product on your data — not described on a slide or promised on a roadmap.

STEP 03

Count what stays behind

Every unchecked box met by a separate system is an integration to build, pay for, and reconcile. Add those to total cost of ownership.

ABOUT VERTRAX ENERGY

Vertrax Energy is unified cloud ERP and delivery logistics for multi-fuel distributors — financials, inventory, pricing, dispatch, delivery, and field service running as one product on one database. It is built for distributors who are not a single-fuel, single-channel business: every product they sell, every delivery model they run, and every segment they serve, from refinery to residence. The Smartdrops delivery engine powers dispatch, routing, and driver mobility from inside the product, so nothing is keyed twice between the field and the office.

Built on Acumatica's cloud platform, Vertrax was acquired in 2026 by Acumatica — a recognized ERP market leader serving more than 10,000 businesses worldwide with the industry's highest customer satisfaction scores.

> *"Vertrax Energy is a full inside/outside — office to truck — solution that allows entire organizations to become more efficient."*
>
> JASON G., VP OF OPERATIONS

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VERTRAX | Acumatica The Cloud ERP

Founded on Acumatica's platform, **Vertrax** was acquired in 2026 by **Acumatica** — a recognized ERP market leader delivering innovative, AI-enabled business management solutions to more than 10,000 businesses worldwide with the industry's highest customer satisfaction scores.