Promotions

What are Promotions?

Promotions allow you to offer discounts or apply surcharges to customer invoices automatically. Once configured, promotions are applied when invoices are created, helping you run marketing campaigns, seasonal pricing, or loyalty programs without manual calculations.

Types of Discounts and Surcharges

Discount Strategies

Promotions can reduce invoice amounts in three different ways:

1. Flat Amount

- Takes a fixed dollar amount off the invoice
- Example: $10 off every delivery
- Set as a negative value (e.g., -10.00)

2. Percentage of Fuel Cost

- Discounts based on a percentage of the fuel subtotal
- Example: 5% off propane deliveries

3. Per-Unit Adjustment

- Adjusts the price per gallon or liter
- Example: $0.10 off per gallon
- Set as a negative value per unit (e.g., -0.10)

Surcharges

You can also add charges to invoices by using positive values instead of negative ones. This is useful for:

- Late payment fees
- Peak season pricing
- Delivery surcharges
- Minimum delivery penalties
- Check handling
- Convenience fees

When Promotions Apply

Application Methods

Promotions can be configured to apply in different ways:

Universal

- Applies to every qualifying invoice automatically
- Great for ongoing discounts or standard pricing adjustments
- Example: All residential customers get 3% off heating oil

Countdown

- Counts down a specific number of invoices
- When the counter reaches zero, the promotion applies once and then deactivates
- Example: "Your next 10 deliveries are free, then get $20 off the 11th"

Limited Uses

- Applies to a set number of invoices, then deactivates
- Example: "First 5 customers get 10% off"

Volume-Based

- Applies when the delivery meets certain volume requirements
- Example: "100 gallons or more gets $15 off"
- Requires volume tiers to be configured

Negative Volume

- Applies when the delivery is below a certain volume
- Example: "Small deliveries under 50 gallons have a $10 surcharge"
- Requires volume tiers to be configured

Time-Based

- Discount appears on the invoice but only applies if the customer pays within a certain number of days
- Example: "Pay within 15 days and get 5% off"
- Great for encouraging prompt payment

Filtering Which Invoices Get Promotions

By Fuel Type

You can limit promotions to specific types of fuel:

- All fuel types
- Propane only
- Heating oil only
- Other specific fuel types

By Date Range

Set when the promotion is active:

- **Start Date** - When the promotion begins
- **End Date** - When the promotion expires
- Leave blank for ongoing promotions

Example: Create a summer promotion active from May 1 to September 30 that automatically repeats each year (you'll need to update the year manually).

Applying Promotions

Promotions must be assigned to specific delivery locations to be used. This allows you to:

- Run different promotions at different delivery locations
- Have granular control of which customers get the promotions
- Easily add or remove promotions

Setting Up a Promotion

Basic Setup

1. Navigate to the promotions management section
2. Click "Create New Promotion"
3. Fill in the required information:
   - **Name** - What you'll see in lists and on invoices
   - **Description** - Optional notes about the promotion
   - **Active** - Toggle to enable/disable the promotion

Choose Your Discount Type

4. Select a **Strategy**:
   - Flat Amount - Fixed dollar discount
   - Percentage - Percent off the fuel cost
   - Per-Unit - Discount per gallon/liter
5. Enter the **Value**:
   - For discounts, use negative numbers (e.g., -10 or -0.05)
   - For surcharges, use positive numbers (e.g., 10 or 0.05)
   - For percentages, use decimals (5% = 0.05, not 5)

Choose How It Applies

6. Select an **Application Method**:
   - Universal - Every qualifying invoice
   - Countdown - Count down to one final discount
   - Limited Uses - Fixed number of applications
   - Volume-Based - Based on delivery size
   - Negative Volume - For small deliveries
   - Time-Based - Only if paid quickly
7. Configure method-specific settings:
   - **Countdown**: Set how many invoices until the discount
   - **Limited Uses**: Set total number of uses available
   - **Time-Based**: Set the payment window in days

Set Filters (Optional)

8. Choose which invoices qualify:

- **Fuel Type** - Leave blank for all, or select specific type
- **Fuel Subtype** - Further narrow by propane, oil, etc.
- **Start Date** - When the promotion begins (optional)
- **End Date** - When the promotion ends (optional)

Assign to Locations

9. After creating the promotion, assign it to the locations where it should be active
10. Without location assignments, the promotion won't be used

Managing Active Promotions

Viewing Promotions

You can view:

- All promotions across the company
- Promotions assigned to a specific delivery location
- Active vs. inactive promotions
- Usage statistics (for limited use and countdown promotions)

Editing Promotions

You can update most promotion settings at any time:

- Change the discount amount
- Adjust date ranges
- Toggle active/inactive status
- Modify application settings

Note: Changes apply immediately to new invoices but don't affect invoices already created.

Deactivating Promotions

When a promotion ends:

- Toggle the "Active" switch to off, or
- Delete the promotion (it will be archived, not permanently removed)

Inactive promotions won't apply to new invoices but remain in the system for reporting purposes.

Assigning to Additional Locations

To use a promotion at more locations:

1. Find the promotion in the list
2. Select "Assign to Location"
3. Choose the location(s)
4. Save

Removing from Locations

To stop using a promotion at a location:

1. Find the promotion
2. Select "Unassign from Location"
3. Choose the location(s) to remove
4. Confirm

Common Promotion Examples

Example 1: Spring Propane Sale

Goal: 5% off all propane deliveries in April, payment required within 15 days

Setup:

- Name: "Spring Propane Sale"
- Strategy: Percentage
- Value: -0.05 (5% discount)
- Method: Time-Based
- Payment Window: 15 days
- Fuel Type: Fuel
- Fuel Subtype: Propane
- Start Date: April 1
- End Date: April 30
- Assign to all locations

Example 2: New Customer Welcome

Goal: $25 off each of the first 3 deliveries for new customers

Setup:

- Name: "New Customer Welcome"
- Strategy: Flat Amount
- Value: -25.00
- Method: Limited Uses
- Uses Remaining: 3 (per promotion instance)
- Assign to customer's location when they sign up

Note: You'd create a separate promotion instance for each new customer or use a different tracking method.

Example 3: Volume Discount

Goal: $20 off deliveries of 150 gallons or more

Setup:

- Name: "Large Delivery Discount"
- Strategy: Flat Amount
- Value: -20.00
- Method: Volume-Based
- Volume Tiers: 150 gallons minimum
- Fuel Type: Fuel
- Assign to applicable locations

Example 4: Small Delivery Surcharge

Goal: $15 surcharge for heating oil deliveries under 100 gallons

Setup:

- Name: "Small Delivery Fee"
- Strategy: Flat Amount
- Value: 15.00 (positive for surcharge)
- Method: Negative Volume
- Volume Threshold: 100 gallons
- Fuel Subtype: Heating Oil
- Assign to all locations

Example 5: Summer Service Discount

Goal: 10% off all summer deliveries (June-August), applies to every invoice

Setup:

- Name: "Summer Service Special"
- Strategy: Percentage
- Value: -0.10 (10% discount)
- Method: Universal
- Start Date: June 1
- End Date: August 31
- Assign to desired locations

Example 6: Loyalty Countdown

Goal: After 12 full-price deliveries, customers get their 13th delivery free

Setup:

- Name: "Baker's Dozen Loyalty"
- Strategy: Percentage
- Value: -1.00 (100% discount)
- Method: Countdown
- Countdown Invoices: 12
- Assign when customer enrolls in program

How Time-Based Promotions Work

Time-based promotions are unique because they appear on the invoice but only actually apply when the customer pays:

At Invoice Creation

- The promotion is noted on the invoice
- Customer sees the potential discount
- Invoice shows the discounted amount

At Payment Time

- System checks if payment is within the allowed window
- If yes, the discount is applied to the ledger
- If no, the discount is removed and full amount is charged

For Automatic Payments

- Autopay system automatically applies time-based promotions if within the window
- If payment fails, the discount is automatically rolled back
- Customer can retry payment if still within the window

Example: Invoice created on January 1 with a 15-day early payment discount:

- Customer pays January 10: ✓ Discount applies
- Customer pays January 20: ✗ No discount (too late)

Tips for Success

Setting Up Percentages

- Always use decimal values: 5% = 0.05, not 5
- For discounts, make them negative: -0.05
- Double-check the math before activating

Date Ranges

- Use specific start/end dates for seasonal promotions
- Leave dates blank for ongoing promotions
- Remember to update yearly promotions when they expire

Testing Promotions

- Start by assigning to just one location to test
- Create a test invoice to verify the calculation
- Expand to more locations once confirmed working

Volume Thresholds

- Make sure volume tiers are configured before activating volume-based promotions
- Be clear about whether the threshold is gallons or liters
- Consider fuel expansion/contraction in your thresholds

Multiple Promotions

- Customers can potentially qualify for multiple promotions on one invoice
- The system applies all qualifying promotions
- Be mindful of stacking discounts that might be too generous

Communication

- Let customers know about promotions in advance
- Include promotion details on invoices when applicable
- Send reminders for time-based promotions (e.g., "Pay within 10 days to save 5%")

Troubleshooting

Promotion Not Appearing on Invoices

Check these common issues:

- Is the promotion marked as Active?
- Is it assigned to the correct location?
- Does the invoice match the fuel type/subtype filters?
- Is today's date within the start/end date range?
- For volume-based: Does the delivery meet the volume requirement?
- For limited uses: Are there uses remaining?

Wrong Discount Amount

Verify:

- The strategy matches your intent (flat vs. percentage vs. per-unit)
- For percentages, you're using decimal format (0.05, not 5)
- The value has the correct sign (negative for discount, positive for surcharge)
- For volume-based, the volume tiers are configured correctly

Time-Based Discount Not Applied

Confirm:

- Payment was made within the allowed number of days
- The invoice creation date + valid days hasn't passed
- Automatic payment processing completed successfully
- Customer's payment method was valid

Promotion Deactivated Unexpectedly

This can happen when:

- Limited uses reached zero
- Countdown completed its cycle
- End date was reached
- An administrator manually deactivated it

Check the promotion history or activity logs for details.

Getting Started

To start using promotions:

1. **Plan your promotion** - Decide on the discount type, amount, and rules
2. **Create the promotion** - Fill in all the details carefully
3. **Assign to locations** - Choose where it should be active
4. **Test it** - Create a test invoice to verify it works correctly
5. **Monitor usage** - Keep track of how often it's applied
6. **Adjust as needed** - Fine-tune the settings based on results

Promotions help you attract new customers, reward loyal ones, and manage pricing flexibility across your business. Set them up strategically to maximize their impact!

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