Understanding Calendar Schedules

Calendar scheduling allows you to set up automatic delivery requests for your customers based on recurring patterns. When you post an invoice for a fuel delivery, the system automatically creates the next delivery request based on the schedule you've configured.

Key Features

Flexible Recurring Patterns

You can schedule deliveries to repeat at any interval you need:

- **Every X Days** - For example, every 30 days or every 45 days
- **Every X Weeks** - For example, every week or every 2 weeks
- **Every X Months** - For example, monthly or every 3 months
- **Every X Years** - For annual deliveries

Specific Day of the Week

If your customers prefer deliveries on certain days, you can set schedules to occur on:

- Monday through Sunday (or any specific day)
- Leave blank if the day of the week doesn't matter

When you set a day of the week, the system will automatically schedule the delivery on the next occurrence of that day after the interval passes.

Example: If you schedule "every 2 weeks on Friday," the system will always create delivery requests for Fridays, even if the exact 2-week interval would land on a different day.

Seasonal Schedules

Many customers have different needs throughout the year. Calendar scheduling supports seasonal patterns:

- **Summer Schedule** - Active only during warm months (e.g., May 1 - October 31)
- **Winter Schedule** - Active only during cold months (e.g., November 1 - March 31)
- **Year-Round** - Active all 12 months

The system uses the month and day from your start and end dates, ignoring the year. This means your seasonal schedules automatically repeat every year without needing to update them.

Example: Set a schedule active from November 1 to March 31, and it will automatically activate every winter, year after year.

Pre-Set Delivery Volume

You can specify how many gallons or liters should be requested for each scheduled delivery. This helps your drivers know approximately how much fuel to bring.

How It Works

Setting Up a Schedule

For each fuel system (tank), you can create one or more calendar schedules with:

1. **Frequency** - How often deliveries should occur (number and unit)
2. **Day of Week** (Optional) - Which day deliveries should happen
3. **Start Date** (Optional) - What month/day the schedule becomes active
4. **End Date** (Optional) - What month/day the schedule becomes inactive
5. **Delivery Volume** (Optional) - How many gallons/liters to request

Automatic Delivery Request Creation

When you post an invoice for a delivery:

1. The system checks if there's an active calendar schedule for that fuel system
2. It verifies the delivery date falls within the schedule's active period
3. It calculates when the next delivery should occur
4. It automatically creates a delivery request for that future date

The new delivery request includes:

- The calculated delivery date
- The requested volume (if specified in the schedule)
- A note explaining it was created by the calendar schedule

Managing Active Schedules

You can have multiple schedules for the same system, but only one will create a delivery request per invoice posting. Schedules can be:

- **Active** - Currently in use and creating delivery requests
- **Inactive** - Disabled and not creating delivery requests

To stop a schedule from creating delivery requests, mark it as inactive rather than deleting it. This preserves the configuration if you need to reactivate it later.

Common Use Cases

Example 1: Summer Propane Fill-Ups

Scenario: A customer wants propane deliveries every 60 days during the summer months only.

Configuration:

- Frequency: 60 days
- Day of Week: (none)
- Active: May 1 - October 31
- Volume: 100 gallons

Result: Every time you post an invoice between May and October, the system creates the next delivery request 60 days out. No deliveries are scheduled during winter months.

Example 2: Weekly Friday Deliveries

Scenario: A commercial customer receives heating oil every week on Fridays.

Configuration:

- Frequency: 1 week
- Day of Week: Friday
- Active: Year-round

- Volume: 150 gallons

Result: After each delivery, the system automatically schedules the next delivery for the following Friday.

Example 3: Monthly Winter Fuel Oil

Scenario: A residential customer needs heating oil monthly during winter only.

Configuration:

- Frequency: 1 month
- Day of Week: (none)
- Active: November 1 - March 31
- Volume: 200 gallons

Result: Monthly deliveries are scheduled from November through March each year. The schedule automatically reactivates each winter.

Example 4: Bi-Weekly Tuesday Deliveries (Winter Only)

Scenario: A customer wants deliveries every 2 weeks on Tuesdays, but only during the heating season.

Configuration:

- Frequency: 2 weeks
- Day of Week: Tuesday
- Active: October 1 - April 30
- Volume: 175 gallons

Result: Deliveries are scheduled every other Tuesday during the specified months, automatically resuming each heating season.

Tips for Success

Setting Seasonal Boundaries

- Use month and day only - the year is automatically ignored
- For winter schedules that cross year boundaries (e.g., Nov-Mar), make sure the start month comes after the end month
- Leave both blank if you want year-round scheduling

Choosing Day of Week

- Use this when customers have specific preferences or when route optimization matters
- Leave blank for maximum flexibility in scheduling
- Remember: Monday = 1, Sunday = 7

Delivery Volume Estimates

- Set realistic volumes based on the customer's usage patterns
- This helps drivers prepare the right amount of fuel
- You can always adjust the actual delivery amount when fulfilling the request

Multiple Schedules

- You can create different schedules for different seasons
- Make sure to set appropriate start/end dates so they don't overlap
- Only one schedule will trigger per invoice posting, so avoid conflicting active schedules

Troubleshooting

No Delivery Request Created

If a delivery request isn't automatically created after posting an invoice:

- Check that the schedule is active (not marked inactive)
- Verify the delivery date falls within the schedule's active date range
- Ensure the fuel system has the calendar schedule properly configured
- Contact your system administrator if the issue persists

Wrong Delivery Date

If the calculated delivery date seems incorrect:

- Double-check the frequency and frequency units (days vs. weeks vs. months)
- If using day of week, verify the correct day is selected (1-7)
- Review the seasonal start/end dates to ensure they're set as intended

Seasonal Schedule Not Activating

For schedules that should work across the year boundary (Nov-Mar):

- Make sure the start date's month number is greater than the end date's month number
- Example: November (month 11) to March (month 3) is correct
- The system automatically handles the year transition

Getting Started

To begin using calendar scheduling:

1. Navigate to the fuel system you want to schedule
2. Create a new calendar schedule
3. Configure the frequency, optional day of week, and seasonal dates
4. Set the delivery volume if desired
5. Save the schedule
6. Post the next invoice for that system - the delivery request will be created automatically

Calendar scheduling saves time by eliminating manual delivery request creation and ensures consistent service for your customers. Set it up once and let the system handle the rest!

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