Orders - SKY Energy

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Overview

A listing of all Energy Product Delivery Orders (PDO) is available in SKY Energy. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

Columns displaying include:

- Ticket Number – Formerly known as *Call In ID*.

- Location

- Call In Date

- Due Date – This column defaults to ascending (oldest date at the top).

- Status – This column defaults to show *Incomplete* first.

- Customer

- Phone

- Tank Serial Number

- Order Type

- Tank Description

- Route

- Region

Note: Any field without data will show a double dash (--).

With access to SKY Order, review customer bookings from SKY Energy by selecting the **Bookings** link. This opens the *Bookings* page of SKY Order in a new browser tab.

A full page view of Product Delivery Order information is available by selecting the *Ticket Number* on the *Orders* grid or from the *Tank History* page.

View Product Delivery Order
Product Delivery Order #1002

Tank ▲

Tank Serial Number	Customer Name	Customer ID	Credit Status	Location	Location ID
250156 ↗	James Ade ↗	AdeJa	✅ Fair	Main Plant	00MAIN

Order Details ▲

Call In Date
10/31/2020

Due Date
10/31/2020

Additional Comments
--

Delivery ▲

Product Name
Propane - Home Heating

Product ID
PropHH

Product Location
Main Plant (00MAIN)

Current %
80 ℹ️

Out of Gas
No

Times Out of Gas
0

Deliver By
Number of Gallons

Number of Gallons
50

Charge Price
$3.85 / Gal

Amount Needed
50 Gal

For more information on how to use the *Energy Product Delivery Order* grid see, **Using Grids in Agvance SKY**.

To view more Customer details, select the Customer name link to open that specific Customer's SKY Customer *Overview* page. Read more about the **SKY Customer Overview** page.
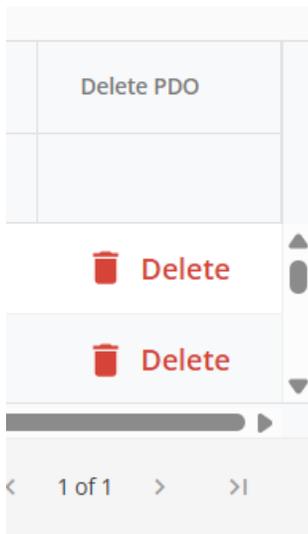
Product Delivery Orders

A user permission is required to enable adding or editing a Product Delivery Order within SKY Energy at *SKY Company Admin / User / Edit User*. Toggle on *Add/Edit Product Delivery Order* to add or edit a Product Delivery Order on the Orders page of SKY Energy that has not been invoiced. Invoiced PDO's will always be view only.

On view of a Product Delivery Order, selecting **Tank Serial Number** opens the selected tank information in a new tab and with access to SKY Customer, selecting **Customer Name** opens the selected customer's SKY Customer page in a new tab.

On the *Add/Edit* view of a *Product Delivery Order*, selecting **Tank Serial Number** opens the selected tank information in a new tab, and with access to SKY Customer, **Customer Name** opens the selected customer's SKY Customer page in a new tab. Also, to change or remove the selected tank on a new PDO, select **Remove Tank.** That tank will be removed and the **+ Add Tank** button will be visible again.

Delete Product Delivery Orders from the *Orders* page using the **Delete** action column if incorrect or unneeded. The SKY User permission *Delete Product Delivery Order* is required to use the Delete option.

Open SKY *Energy / Orders*, hover over the blue **+** icon, and select **New Product Delivery Order**.

On the *New Product Delivery Order* page, all fields will appear with sections expanded. The left navigation tree expands view upon hovering, and choosing a section will jump to that area of the form.
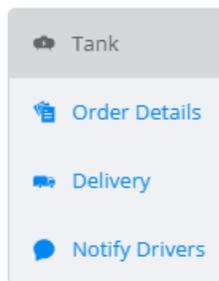
Tank

New Product Delivery Order

Tank ▲

Tank Serial Number	Customer Name	Customer ID	Credit Status	Location	Location ID	Remove Tank
250159 ↗	Larry Baker ↗	12345	✓ Excellent	Main Plant	00MAIN	🗑 Remove

- Add the Tank to order by selecting **+ Add Tank** to open the search overlay and choose from active tanks. The *Tank Serial Number, Customer Name, Location,* and *Credit Status* fields will populate upon choosing **Select + Close**.
    - Once the Tank has been added, it can be removed and replaced if needed by selecting **Remove Tank** and choosing **+ Add Tank** to select the replacement.

Note: Adding a Tank is required to enter a Product Delivery Order.

Order Details

Order Details ▲

Call-In Date*
6/10/2025 📅

Due Date*
6/10/2025 📅

Additional Comments

0 / 250

- **Call-in Date** – Required field that auto fills with the current date.
- **Due Date** – Required field that auto fills with the current date.
- **Additional Comments** – Include comments when creating a PDO for the driver to help with the order once received.

Delivery

Delivery ▲

Product Name
Propane - Home Heating

Product ID
PropHH

Product Location
Main Plant

Determine Remaining By
Calculated ▾

Current %*
0

☐ Out of Gas

Times Out of Gas
0

Delivery By*
Fill Percent ▾

Delivery Amount (%)*
0

Charge Price ($/Gal)
3.85

- **Product Name / Product ID / Product Location**
    - If a Tank is not selected, the following message displays: *Select a Tank to manage delivery options.*
    - Once a tank is selected, the *Product Name, Product ID*, and *Product Location* attached to the Tank will

display. Using the **Change Product** button opens a Product search overlay for a new Product selection.

- ○ If there is not a Product attached to the Tank, **+ Product** displays and is mandatory to save an Product Delivery Order.
- **Determine Remaining By / Current %**
  - ○ If a tank has a monitor, the *Determine Remaining % By* drop-down will default to *Monitor* with *Current (%)* or optionally choose *Calculated*.
  - ○ If a Tank does not have a monitor, the default is *Calculated* and displays in a read-only state with *Estimated (%)*. *Estimated (%)* will default to values in the database but can be changed.
- **Out of Gas** – Mark the tank on the as *Out of Gas*
  - ○ **Times Out of Gas** – Counts how many times the Tank has previously been out of gas.
- **Delivery By** – Defaults to *Fill Percent* or choose *Number of Gallons* or *Amount of Purchase*.
- **Delivery Amount (%) / Delivery Amount (Gal) / Amount of Purchase ($)**
  - ○ If *Fill Percent* is selected, *Delivery Amount %* displays with an initial value of *0*. This can be changed if needed and has a maximum of three numeric characters.
  - ○ If *Number of Gallons* is selected, *Delivery Amount (Gal)* displays with an initial value of *0*. This can be changed if needed and has a maximum of five numeric characters.
  - ○ If *Amount of Purchase* is selected, *Amount of Purchase ($)* displays with an initial value of *0*. This can be changed if needed and has a maximum of four numeric characters.
- **Charge Price** – Price charged per gallon.

Notify Driver

Upon saving the PDO, a standard formatted email will be sent to the email associated with that driver. By default, any Drivers already linked to a tank will display. Additional drivers can be selected by choosing the **+ Add Driver** button.

Note: Only drivers with email entries added in desktop Agvance will display.

Notify Drivers ▲

Driver ID	Driver Name	Driver Email	Preview Message	Delete
678RT	Jane Example	fueltest@agvance.net	🖾	🗑

+ Add Driver

- **Driver ID**
- **Driver Name**
- **Driver Email**
- **Preview Message** –Selecting *Preview Message* will open a dialog showing what the message to the driver will

look like.

- Email from will default to the company's email as the sender.

- *Email To* will show Drivers email address.

- *Subject* to read *Product Delivery Order #TBD / Delivery Scheduled*.

Driver Email Preview

Email To
fueltest@agvance.net

Subject
Product Delivery Order #TBD /Delivery Scheduled

Message
Order Info:
    Larry Baker (12345)
    Propane - Home Heating
    Amount: 0
    Fill to 0 at 3.85/Gal
    Deliver By: 09/25/2025
    Current Tank%: 0
    Notes:
    SN: 250159
    Size: 500
    2500 N 1140 Rd E
    Shelbyville IL, 62565
    Desc: Home Heat
    Route: North
    Region: East
    Directions/Notes:

Message Recipients:
fueltest@agvance.net

Close

- **Delete** – Removes the selected Driver from receiving notifications.

- **+ Add Driver** – When selected, a Driver search modal displays to choose from a list of active drivers.

Saving or Canceling

Select **Create Order** will save the new Product Delivery Order and route back to the *Orders* list page. A validation banner at the bottom of the screen indicates the order has successfully been saved.

- If any required inputs are empty, the validation banner will display at the top of the page, below the header, calling attention to required inputs.

  - A Tank must be added.

- Delivery Amount (*%* or *Gal*) or *Amount of Purchase ($)* must be entered.
- The validation banner and error state of inputs will display until the user selects **Create Order** after entering required content.

Select **Cancel** to close out and return to the *Orders* screen. If any field was populated, a message displays stating the Tank will not be saved. Select **Discard & Continue** to cancel the Tank or **Go Back** to return to the *Add Product Delivery Order* form.

Product Delivery Order Will Not Be Saved

If you leave this page without saving, any information entered for this product delivery order will not be saved.

Discard & Continue   Go Back
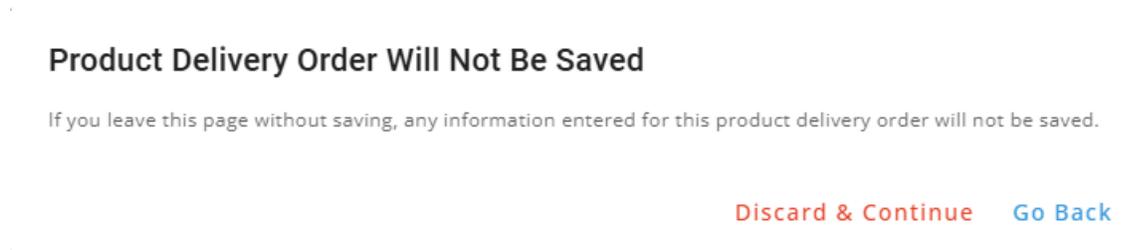
Pending Invoice(s)

To view all driver deliveries made and communicated from AME but not yet invoiced during the day, navigate to the *Pending Invoice* tab. When the page is refreshed, or upon the initial open of Orders page the *Pending Invoice* number will update. Pending Invoices have their own numbering system that would not match Invoices. These are called ticket numbers in Agvance.

The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns.*
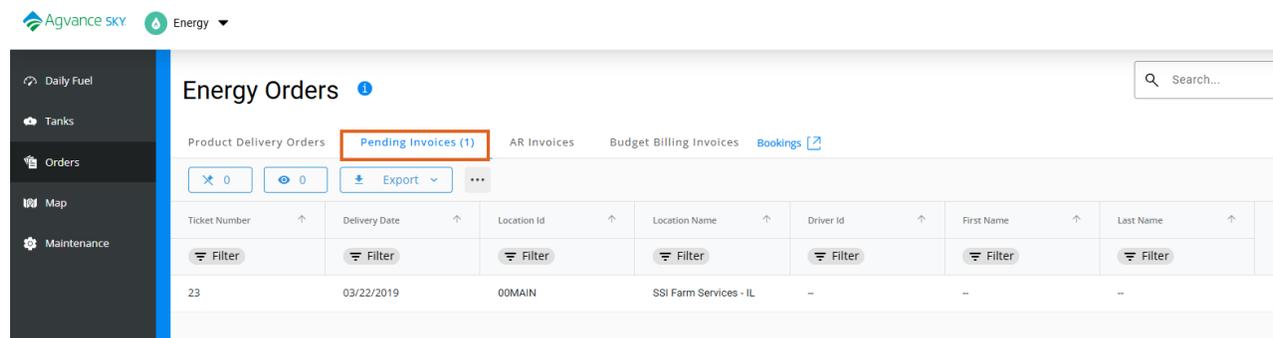
AR Invoices

View a listing of Energy Invoices tied to Product Delivery Orders (PDO) on the *Invoices* tab at *SKY / Energy / Orders*. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns.*

The *Invoice Number* is tied to the Invoice. View more Invoice details by selecting the *Invoice Number* link on any row.
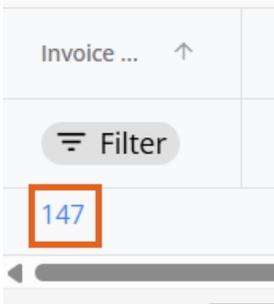
The Invoice opened shows more details including the *Status* (*Open* (Invoiced), *Reversed*, *Voided*, and *Paid*), *Location Name*, *ID*, and split information if applicable. The *Tank Serial Number* is tied to PDO/Invoice and when selected opens a new tab viewing the *Tank Info* page for that specific Tank. The *Product Delivery Order Number* opens a new tab to view the relative *Product Deliver Order* page and related information.

Invoices also show Product detail in grid form and additional PDO details below the grid. The list can be narrowed using the **Filter** icon and filter criteria or by typing in the search bar located in the header to populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns.*

Pricing details display on the Invoice view for review or referencing Energy Invoices.

Note: Any field without data will show a double dash (--).

Selecting the **Paid** *Status* link, with having *SKY Customer* access, opens the *Payments* page of *SKY Customer* in a new browser tab.

If an AR invoice has multiple drivers associated with it, any/all associated driver details will display.

When viewing the AR Invoice grid, only the first driver is displayed, open and view the entire invoice to view all drivers.

Driver Name	Driver ID	Remove
Matt Smith	SMIMAT	🗑 Remove
Peter Capaldi	CAPPET	🗑 Remove

✏ Manage Drivers

Budget Billing Invoices

The *Budget Billing Invoices* tab displays a list view of all Budget Billing customer invoices at *SKY / Energy / Orders*. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria or or any grid cell with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns.*

Select any **Budget Invoice Number** to open an Invoice details page that includes Tank and Customer information (with *Customer Name* and *Tank Serial Number* redirecting to their respective pages with required SKY Customer

access), Invoice details, Product details and Pricing information.

Selecting the **Paid** status from *Budget Billing Invoices* tab opens the Customer's *Payments* page in SKY Customer in a new tab.

For all non-budget billing energy invoices see the *AR Invoices* tab.