

Route Management - SKY Energy

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Agvance Energy Dispatch users can view route lists displayed in a grid populated by the first 500 *Ready* status energy work and delivery orders based on ticket number (highest to lowest).

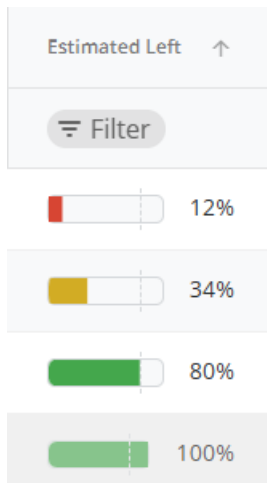
The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria on any grid cell or with the search bar located in the header. When typing, the grid will populate based on the text entered. Choose the **Ellipsis** at the top to *Reset Grid* from filtering or *Autofit Columns*.

The screenshot shows the 'Route Management' interface. At the top, there is a search bar and a user profile for 'Anna Admin (SSI)'. Below the search bar, there are buttons for 'Schedule Route', 'Export', and a refresh icon. The main area is a table with columns: Ticket Number, Out of Gas, Estimated Left, Ticket Type, Status, Location ID, Location, Call In Date, Scheduled Date, and Due Date. Each column has a 'Filter' icon above it. The table contains 10 rows of data, with ticket numbers ranging from 4010 to 4018. The 'Status' column shows 'Ready' for all entries. The 'Estimated Left' column shows percentages (0%, 50%, 80%) and includes progress bars. The 'Out of Gas' column shows 'No' for all entries. The 'Location' column shows 'Main Plant' for all entries. At the bottom, there is a pagination control showing 'Items per page: 50' and '1 of 1'.

Ticket Number	Out of Gas	Estimated Left	Ticket Type	Status	Location ID	Location	Call In Date	Scheduled Date	Due Date
4018	No	0%	Product Delivery Order	Ready	00MAIN	Main Plant	10/22/2024	--	10/29/2024
4017	No	0%	Product Delivery Order	Ready	00MAIN	Main Plant	10/16/2024	--	10/22/2024
4016	No	0%	Product Delivery Order	Ready	00MAIN	Main Plant	10/16/2024	--	10/23/2024
4015	No	0%	Product Delivery Order	Ready	00MAIN	Main Plant	10/16/2024	--	10/23/2024
4014	No	80%	Product Delivery Order	Ready	00MAIN	Main Plant	09/10/2024	--	09/10/2024
4013	No	80%	Product Delivery Order	Ready	00MAIN	Main Plant	08/07/2024	--	08/07/2024
4012	No	0%	Product Delivery Order	Ready	00MAIN	Main Plant	01/18/2024	--	01/18/2024
4011	No	50%	Product Delivery Order	Ready	00MAIN	Main Plant	01/18/2024	--	01/18/2024
4010	No	50%	Product Delivery Order	Ready	00MAIN	Main Plant	01/18/2024	--	01/18/2024

Columns and Filters

- Ticket Number – Formerly known as *Call In ID*. Clicking will show a full page view of the Product Delivery Order information.
- Out of Gas – If the order was marked Out of Gas the column will display, Yes. If the order was not marked Out of Gas the column will display No.
- Estimated Left (%) – If a tank has a reading within the last 5 days, a percentage bar will show along with percentage amount.



- Very low/Critical, under 25%, will be seen as red.
- Low levels but not yet critical, 26% - 50% will be seen as yellow.
- Normal levels, 51% - 100%, will be green.
- If a tank does not have a tank reading within the last 5 days, the cell will display a double dash (- -) or empty.

Note: The dotted line on the 80% level is to give a better reference based on propane fill % standards.

- Ticket Type – Will display as *Product Delivery Order* or *Energy Work Order*
- Status – This column defaults to show *Incomplete* first.
- Location ID
- Location
- Call In Date
- Schedule Date
- Due Date
- Complete Date
- Customer ID
- Customer – 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.
- Credit Status
- Tank Serial Number – Navigates to the *Tank Information* page.
- Tank Description
- Product ID
- Product Name
- Deliver By
- Tank Size
- Tank Address
- Tank City
- Tank State

- Tank Zip
- Salesperson
- Driver Name
- Route
- Region
- Geo Reference

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

The **Filter** button can be selected to narrow down scheduled Routes by *Location, Status, Driver, Tank Type, Region, Route, Product, Out of Gas, and Date (Call In Date, Due Date, Scheduled Date, Completed Date)*. After selecting desired filter options, choose **Apply Filters**. To reset the filters, open the **Filter** panel, scroll to the bottom and select **Reset Filters**.



[Redacted]

Status

Ticket Type

- Both
- Product Delivery Order
- Energy Work Order

Delivery

Driver

Tank Delivery Type

Region

Route

Out of Gas

- Both
- Yes
- No

Date

Filter by Date

None

Start-End



MM/DD/YYYY-MM/DD/YYYY

Apply Filters



Unapplied filter changes

Reset Filters

For more information on how to use the *SKY Energy Route Management* grid see, [Using Grids in Agvance SKY](#).

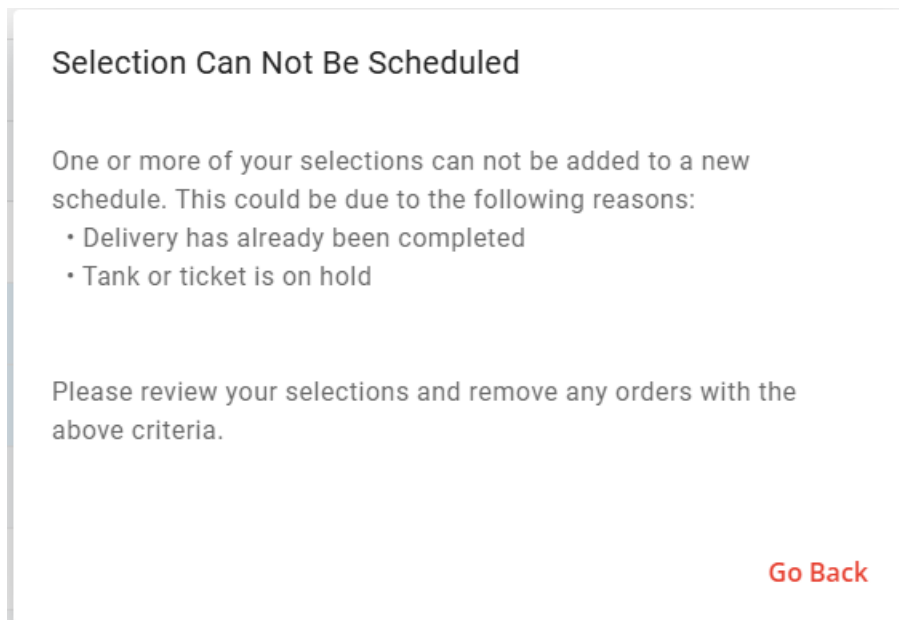
Create Schedule

Creating schedules in SKY Energy from the Route Management page requires the SKY Admin permission *Manage Route*.

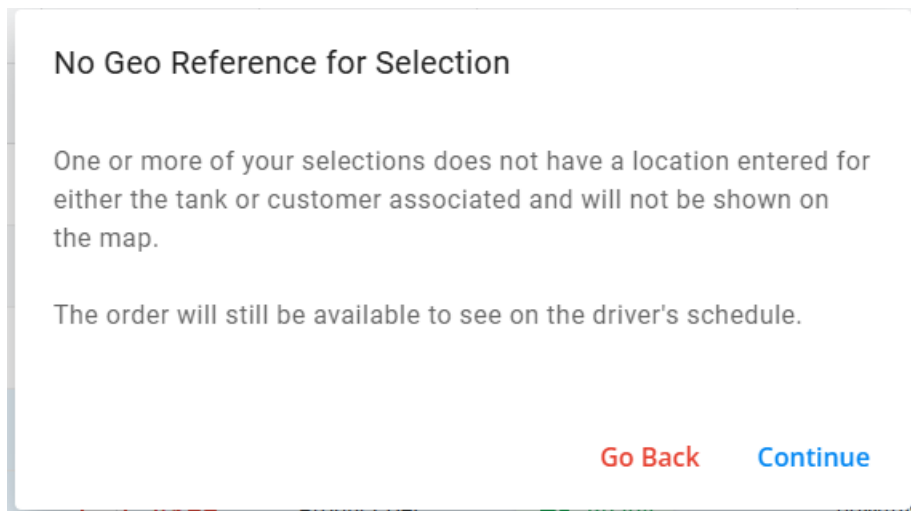
- If the permission is on, a check box column becomes available and *Select a row to begin scheduling process* displays at the top of the page.
- If the permission is not on, no check box column shows and no additional helper text is displayed. This will be view only.

1. To create a schedule, select the checkbox for a row and the **+ Manage Job Schedule** button displays in the bottom right.

- Validations are displayed first if applicable to any orders
 - If one or more selected rows have Product Delivery Order *Status* as *Complete* or *On Hold* or if the *Tank Status* linked to the order is *On Hold* the following message displays. **Go Back** is the only option available and creating a schedule cannot move forward until the line is unselected.



- If selection does not have a Geo Reference a message displays stating selections do not have a Location entered for either the Tank or Customer associated and will not be shown on the map. The order will still be available to see on the driver's schedule.



Continue will take user to the Manage Job Schedule page while **Go Back** returns to the previous page with all selections still checked.

2. Manage Job Schedule Page:

- **Driver** – Select a single *Driver* to populate on all jobs when saved. Not a required field.
- **Status** – Select a *Status* to be assigned to all jobs when saved. Not a required field.
- SKY Grid detail:
 - **Job Order Number** – Enter a *Job Order Number* if one was not already previously assigned.
 - **Tank Serial Number** – Redirects to *Tank Information* page in a new tab.
 - **Customer ID**
 - **Customer** – Redirects to the *Customer Overview* page (when SKY Customer access is available).
 - **Ticket Type** – Product Delivery Order or Energy Work Order.
 - **Driver ID** – Driver currently assigned if available.
 - **Driver Name** – Driver Name assigned if available.
 - **Job Status** – Current status of job.
 - **Estimated Left** – Estimated % left on tank for this job.
 - **Product ID** – Product detail assigned to this job.
 - **Out Of Gas** – Yes or No (if flagged on the Order).
 - **Must Be First** – Yes or No (if flagged on the Tank) when the Tank must be the first stop of the day.
 - **Remove** – Removes the line from job schedule.

3. Select **Save Schedule** to create the schedule and return to the *Route Management* page (similar to the process in Windows Energy Dispatch).

- Select **Cancel** to cancel scheduling the job. A message displays to choose to Continue and no changes will be saved.

Note: Pressing *Tab* on last entry might be necessary to allow the **Save Schedule** button to activate.

Note: If any filtering is applied on the *Route Management* page when the *Select All* checkbox is chosen, only the filtered selections will come over to the *Manage Job Schedule* page.

Map view coming soon!