Add/Edit a Tank - SKY Energy

Last Modified on 05/20/2026 3:03 pm CDT

SKY Energy is currently only available to Agvance customers.

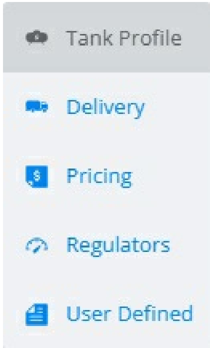
Energy Force customers should continue to add tanks in Energy Force, not through SKY Energy at this time.

To add a new tank from SKY Energy without redirecting back to windows Agvance, a Company Admin will need to toggle on the permission for *Add/Edit Tank* found at *Company Admin / Edit User* pencil icon. Select *Edit* from the grid on the *Tanks* page or on the *Tank Information* page to edit that Tank's information.

Note: Shared Agvance and Energy Force customers do not have the ability to **Add Tank** or *Edit* and *Delete* Tanks from SKY Energy. A notification on the *Daily Fuel* page states *SKY Energy is currently showing Agvance Data only*. Even if the *Admin / Feature* for *Add/Edit Tank* is enabled, being a shared customer the action will be disabled.

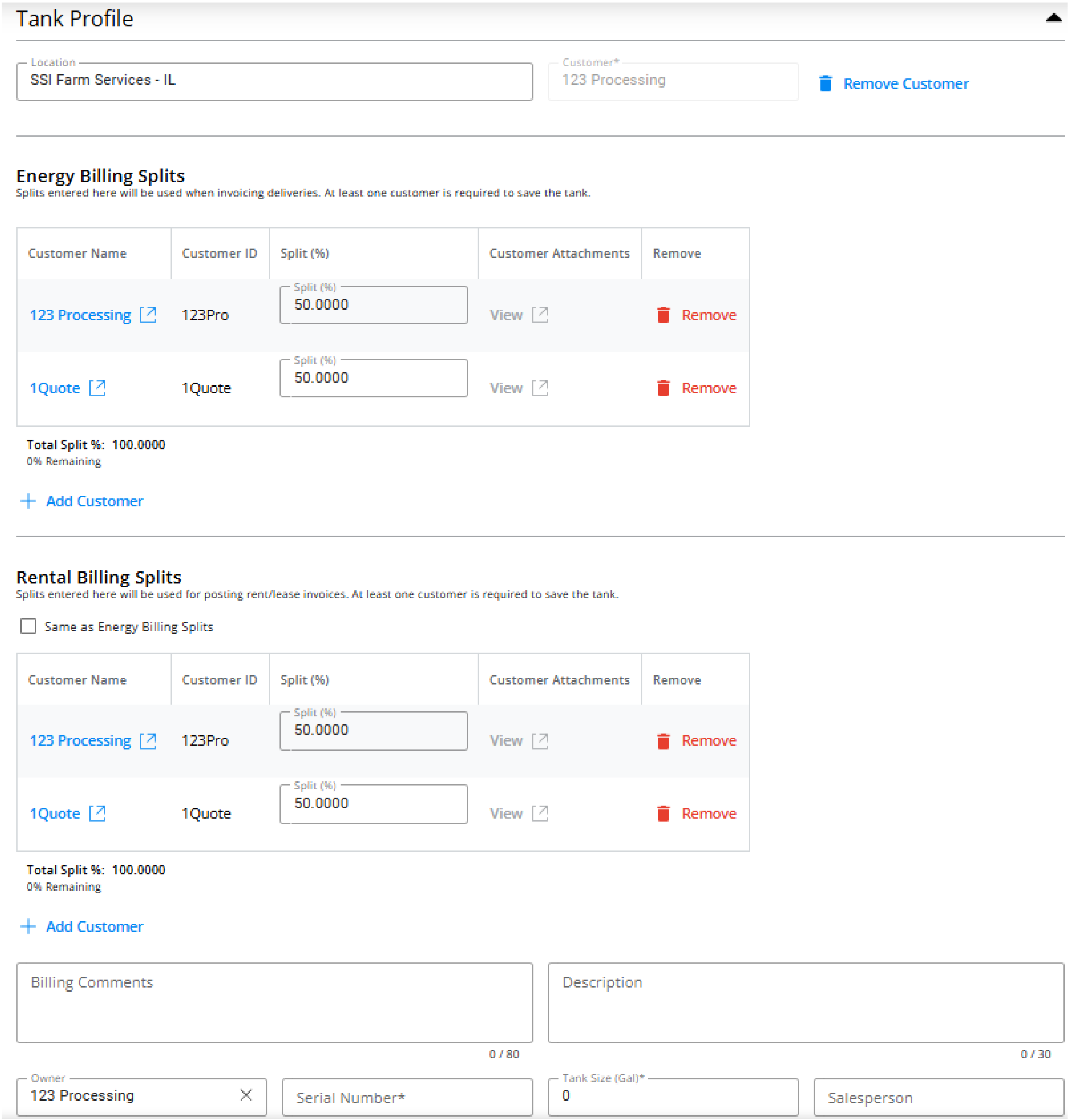
Open *SKY Energy / Tanks* and navigate to the *New Tank* addition page by hovering over the blue **+** icon and select **New Tank**.

On the *New Tank* addition page, all fields will appear on open and sections expanded. The left navigation tree expands view upon hover and choosing a section will jump to that area of the form.



Tank Profile

Choose the appropriate *Location (Location ID)* from the drop-down. Start typing in this field to narrow down results.

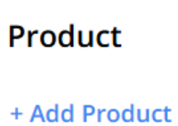


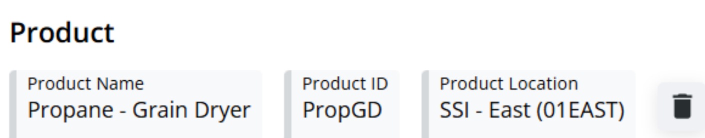
- **Location –** The *Location* name with *Location ID* below must be selected in order for *Add Customer* to appear active on the form.
  Note: If fields are filled out before Location selection or Location selection changes, changes will remain unless the change is a *Customer or Product.*
- **Add Customer –** Filter and choose the *Customer/Owner* from a list and choose **Select & Close**.
- **Energy Billing Splits –** Splits used for invoicing deliveries. When editing a Tank choose multiple customers (Up to 8 customers can be included in a split on a tank.) and allocate the *Split (%)* for each. Total must equal 100% for all in the *Total Split %* field. Remove or change customers by selecting **Remove** or **+Add Customer** in the Energy Billing Splits section.

Note: Splits do not show on the summary/collapsed view.

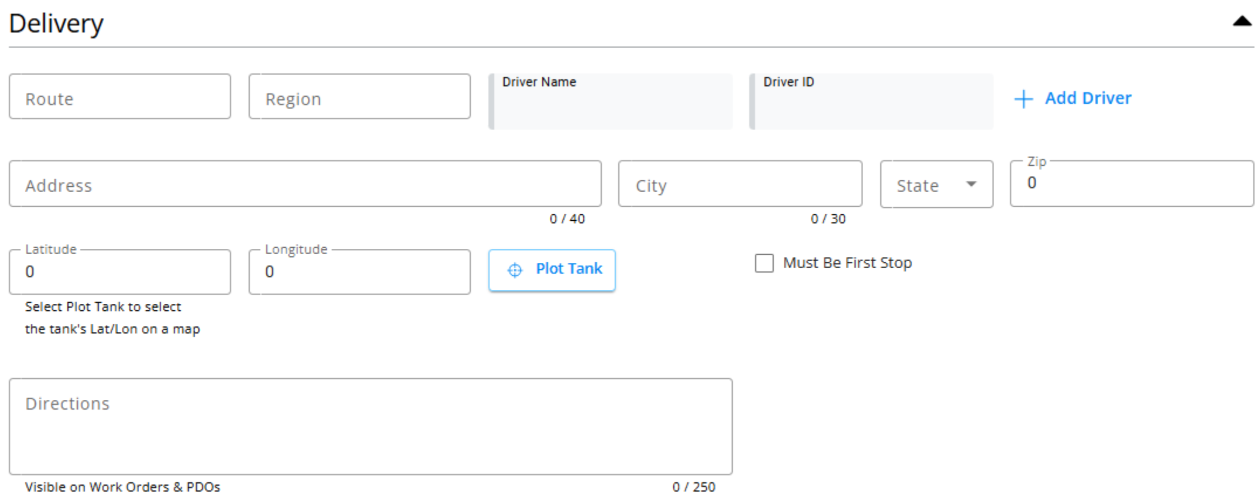
- When viewing Tank Information, select the *Customer Name* and the system will route to the Customer page. Select the **View** link under *Customer Attachments* to view customer attachments.

- **Rental Billing Splits –** Splits used for posting rent/lease invoices. When editing a Tank, Customer Names will populate from the *Energy Billing Splits* section, but can be edited by selecting **Remove** or **+ Add Customer** or choose to check the *Same as Energy Billing Splits* box to keep the same customers and *Split (%).* Total must equal 100% for all in the *Total Split %* field.
  - When viewing Tank Information, select the *Customer Name* and the system will route to the Customer page. Select the **View** link under *Customer Attachments* to view customer attachments.
- **Billing Comments** – Optionally enter comments relating to the billing of the tank.
- **Description –** Provide more detailed information relating to the tank.
- **Owner** – This field populates when the Customer is added but can be changed.
- **Serial Number –** Enter the required serial number for the tank being added or edited. When saving, SKY Energy will validate the new number.
- **Tank Size** – Enter the required tank size.
- **Salesperson –** Preset on both *Add* and *Edit Tank* forms, clicking in this autocomplete field populates a list of Salespeople to choose from. Alternatively, type a Name or ID in field to search.
- **Add Product** – Select **Add Product** to choose from a list of all Products is available in SKY Energy. The list can be narrowed down by selecting the **Filter** icon and entering a filter criteria by *Department ID* or *Name*, *Product Name* or *ID*, *Location* or *Classification* or search in the *Search Customers* 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.*

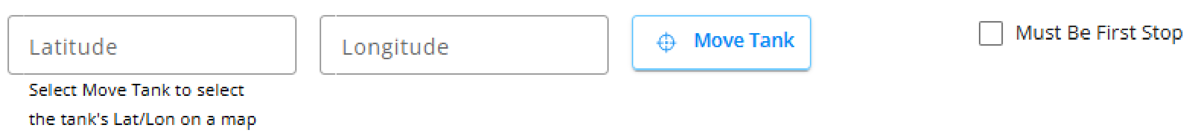




Delivery



- **Route**, **Region** and **Driver** – Choose the appropriate *Route*, *Region*, and *Driver* from the drop-downs. Start typing in this field to narrow down results.
  Note: Inactive drivers should not display. Drivers in the list will only be drivers with email addresses so Orders can be emailed. This rule is set up in desktop Agvance.
- **Must Be First Stop** – Optionally check *Must Be First Stop* if this tank should be routed first.
- **Address**, **City**, **State**, **Zip** – Enter the Tank *Address*, *City*, *State* and *Zip*.
- **Latitude/Longitude** – Enter the Latitude and Longitude tank location details when Adding/Editing a Tank or choose **Plot Tank** to plot the tank on the Map. When Editing a Tank, select**Move Tank** to make adjustments to the Latitude and Longitude.

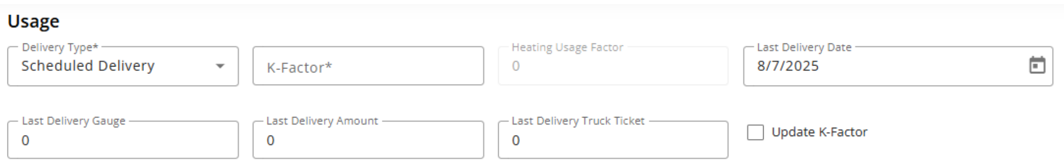
  

  - *Latitude* field
    - -90 to + 90 (up to 6 decimal places/8 characters total - numeric)
  - *Longitude* field
    - -180 to +180 (up to 6 decimal places/9 characters total - numeric)
- **Directions** – Enter *Directions* to the tank that will be visible on Work Orders and Product Delivery Orders.

Usage

- **Delivery Type** – Choose one of the following selections from the dropdown.
  - **Scheduled Delivery**
    - **K-Factor** – Enter the required *K-Factor* for this *Delivery Type.*
    - **Heating Usage Factor** – Read only field that updates from the K-factor.
    - **Last Delivery Date** – Select the last date of delivery from the calendar that will determine with the next delivery date is due.

    - **Last Delivery Gauge** – Input the amount on the gauge from the last delivery up to 100%.
    - **Last Delivery Amount** – Enter the amount from the last delivery.
    - **Last Delivery Truck Ticket** – Enter the Truck Ticket number from the last delivery.
    - **Update K-Factor** – Optionally select to update the K-Factor.

  - **Calendar Days**
    - **K-Factor** – Not required.
    - **Last Delivery Date** – Select the last date of delivery from the calendar that will determine with the next delivery date is due.
    - **Last Delivery Gauge** –Input the amount on the gauge from the last delivery.
    - **Last Delivery Amount** –Enter the amount from the last delivery.
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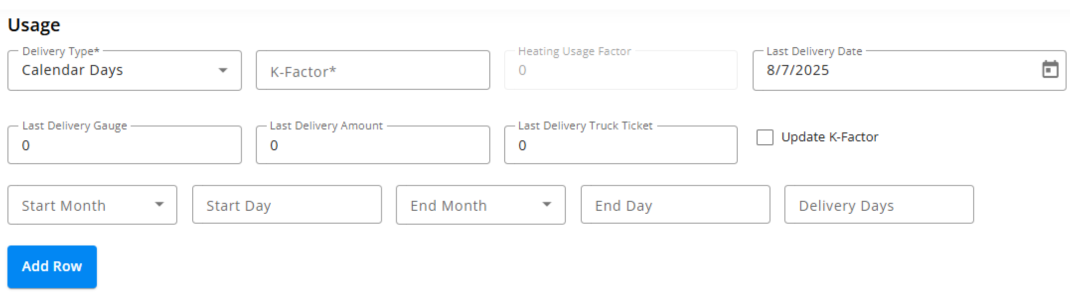
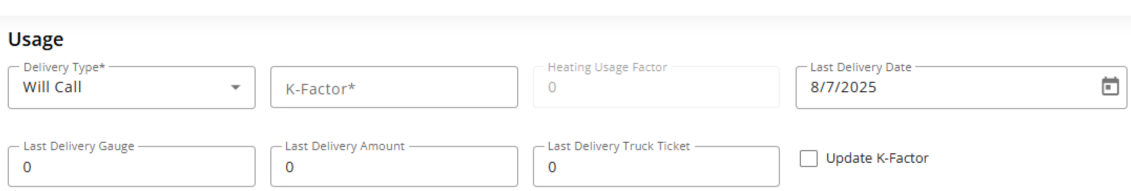
    - **Update K-Factor** – Optionally select to update the K-Factor.

    - A Calendar Days section and table will be added to the bottom of the *Delivery Type* section.
      - Enter information for each Calendar Day delivery the *Start Month*, *Start Day*, *End Month*, *End Day*, and *Delivery Days.*
      - The **Add Row** button will add another row to the Calendar Days table.
      - The **Delete** button on the row will remove the row from the table. The first entry in the table can not be removed.
      - Input information will be used with the *Last Delivery Date* to determine when the next delivery is due.
  - **Will Call**

    - **K-Factor** – Not required.
    - **Last Delivery Date** – Select the last date of delivery from the calendar that will determine with

- the next delivery date is due.
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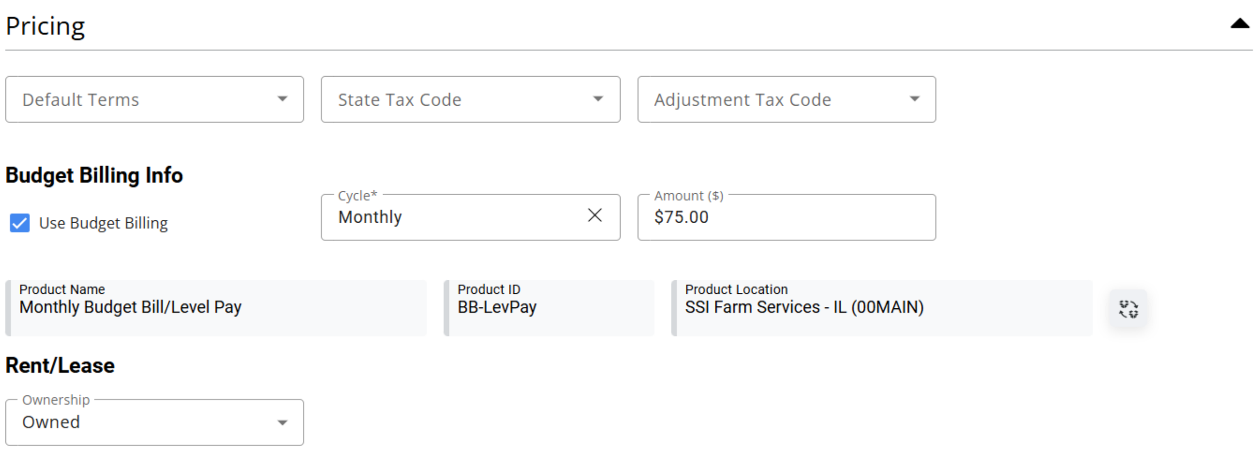
Pricing



- **Default Terms** – Choose from terms set up in Windows Agvance from the drop down.
- **State Tax Code** – Select the state from the drop down to apply the appropriate State Tax Codes.
- **Adjustment Tax Code** – Adjustments to the tax codes can be selected from the drop down.
- **Budget Billing Info** – If *Use Budget Billing* checkbox is selected, *Cycle*, *Amount ($)*, and **Add Product** will be visible.
  - **Use Budget Billing** – This checkbox controls the visibility of additional fields seen below.
    - *Cycle* will be blank but fillable and *Amount* will default to $0.00 when adding a tank or optionally edit the *Cycle* and *Amount* if editing a tank. Both fields are required when *Use Budget Billing* is checked.
    - **Budget Billing Product** – Defaults from *Setup / Preferences* in Windows Agvance or the *Tank Profile* section in Energy Force, but may be changed if necessary. This product is used when posting Budget Bills.
      - Can be replaced by selecting the **Change Product** button, which will open the *Product Selection* overlay.
      - If no preference is set up, the **Add Product** button will be visible and required.
- **Rent / Lease** – Defaults to Owned. If changed to *Rent* or *Lease*, additional fields display for the section.
  - **Ownership** – Choose from *Owned*, *Rent*, or *Lease* (formerly radio buttons in Windows Agvance.)
  - **Add Product** – Select to choose a Product for the tank.

- **Cycle** – Default value is blank but is fillable and a required field.
- **Amount ($)** – Defaults to $0.00.
- **Default Terms** – Choose from available terms in the drop down.
- **Begin Date** – Select the beginning date from the date picker.
- **End Date** – Select the ending date from the date picker.
- **Lease Amount ($)** – Input the lease amount.
- **Lease Payments ($)** – Enter lease payment amount.
- **Net Lease Balance ($)** – Enter the current Net Lease Balance.
- **Payoff Amount ($)** – Enter the payoff amount.
- **Tank Cost ($)** – Enter the tank cost.
- **Depreciation Amount ($)** – Enter a depreciation amount for the tank.
- **Accumulated Depreciation ($)** – If the depreciation amount has accumulated, enter that value.
- **Net Tank Value ($)** – Enter the net value for the tank.
- **Rent/Lease State Tax Code** – Select the applicable code from the drop-down.
- **Rent/Lease Adjustment Tax Code** – Select the applicable code from the drop-down.

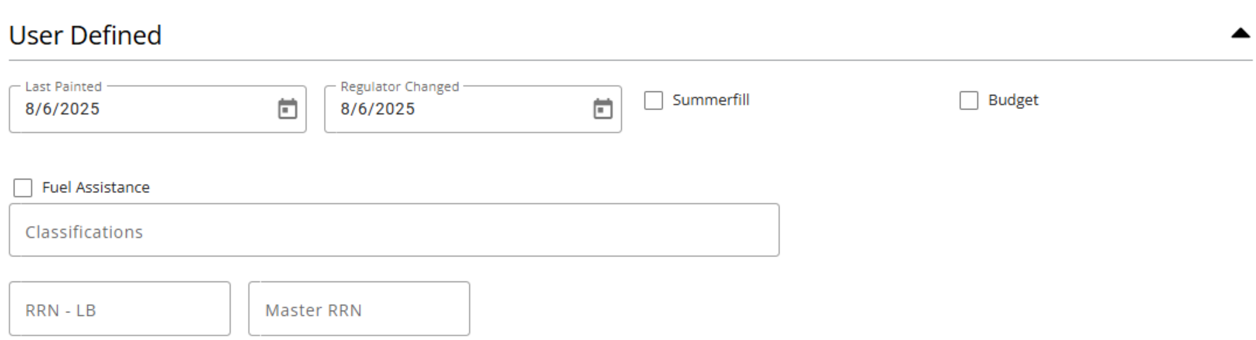
Regulators

Selecting the **+ Add Regulator** Button will open the Regulator Search Overlay. Only regulators that are not currently associated with a tank will be displayed in the table. Multiple regulators may be selected.

Regulator information includes the *Regulator ID*, *Serial Number*, *Model*, and *Manufacturer*.

Selecting **Delete** removes the regulator from the *Add Tank* form and the **+ Add Regulator** displays.

User Defined



- *User Defined* fields set in windows Agvance can also be edited within SKY Energy. These fields can consist of up to 4 date pickers, 4 text inputs, and 4 checkboxes. Users may also define classifications.

Saving or Canceling

Select **Save New Tank** will save the tank and route the user back to the *Tanks* list page. A validation banner at the bottom of the screen lets the user know that the tank has successfully been saved.

- If any required inputs are empty when **Save New Tank** is selected, the validation banner will display at the top of the page, below the header, calling attention to required inputs.
  - Empty required inputs will also show in the Error state.
  - The Serial Number will be validated to make sure that an existing tank does not already have the same value.
  - The validation banner and error state of inputs will display until the user selects **Save New Tank** after entering required content.

Select **Cancel** to close out and return to the *Tanks* 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 Tank* form.