Orders - SKY Energy

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 (--).

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.


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.

Adding PDOs

A user permission required to enable adding Product Delivery Orders within SKY Energy is found at *SKY Company Admin / User / Edit User* and toggle on *Add/Edit Product Delivery Order*.
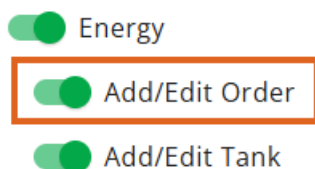
Open SKY *Energy / Orders and* hover over the blue **+** icon and select **New Product Delivery Order.**

On the *New Product Delivery Order* page, all fields will appear on open and 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	Location	
85975465	Barry Anderson	Main Plant	🗑 Remove Tank

- 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,* and *Location* 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 choose **+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*	Due Date*
6/10/2025 📅	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	Current %*	Out of Gas	Times Out of Gas
Calculated	0	☐	0

Delivery By*	Delivery Amount (%)*	Charge Price ($/Gal)
Fill Percent	0	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 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* dropdown will default to *Monitor* with *Current (%)* or optionally choose *Calculated.*
  - If a tank does not have a monitor, the default is *Calculated* and display in a read-only state with *Estimated (%). Estimated (%)* will default to values in the database, but can be changed.
- **Out of Gas – M**ark 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.

Saving or Canceling

Select **Create Order** will save the New Product Delivery Order and route the user back to the Orders list page. A validation banner at the bottom of the screen lets the user know that 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