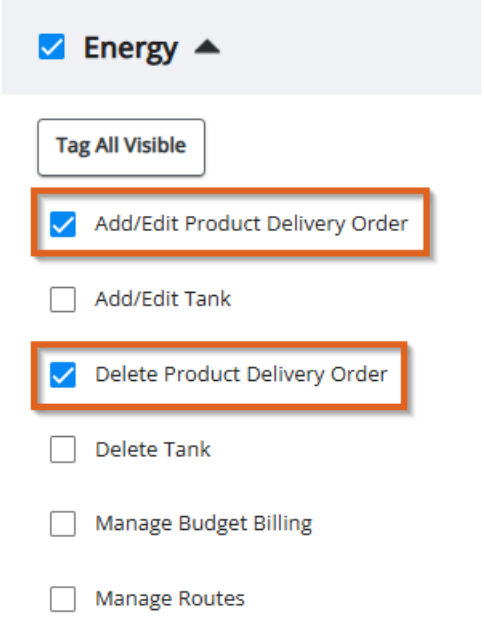
Product Delivery Orders (PDOs) - Agvance SKY Energy

Last Modified on 10/21/2026 4:54 pm EDT

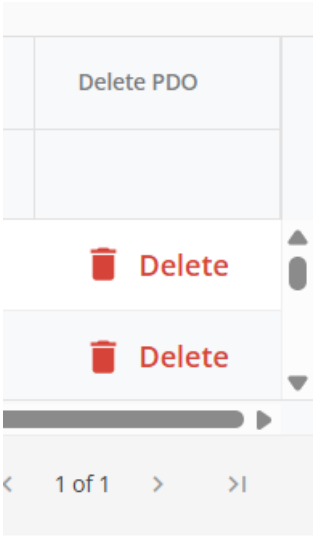
A *Company Admin User Role* permission is required to enable the *Add/Edit Product Delivery Order* permission to add or edit a Product Delivery Order on the *Orders* page of Agvance SKY Energy that has not been invoiced. Invoiced PDOs will always be view only.



When adding/editing/viewing a Product Delivery Order, selecting the **Tank Serial Number** opens the selected Tank information in a new tab, and with access to Agvance SKY Customer, selecting the **Customer Name** opens the selected Customer's Agvance SKY Customer page in a new tab.

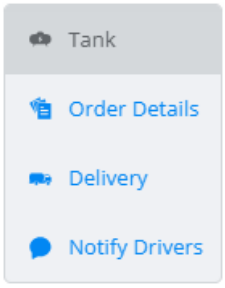
To change or remove the selected Tank on a new PDO, select **Remove Tank.** That tank will be removed and the **+ Add Tank** button will be visible again.

Delete Product Delivery Orders from the *Orders* page using the **Delete** button in the grid if incorrect or unneeded. The Agvance SKY *Company Admin User Role* permission *Delete Product Delivery Order* is required to use the **Delete** option.

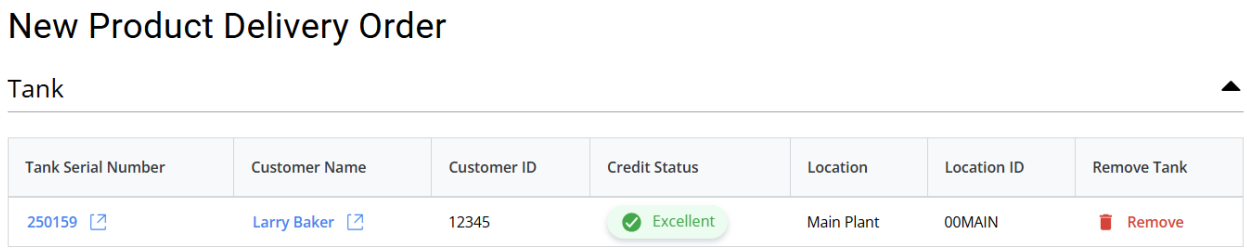


On the *Orders* page in Agvance SKY Energy, hover over the blue **+** icon, and select **+ New Product Delivery Order**.

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.



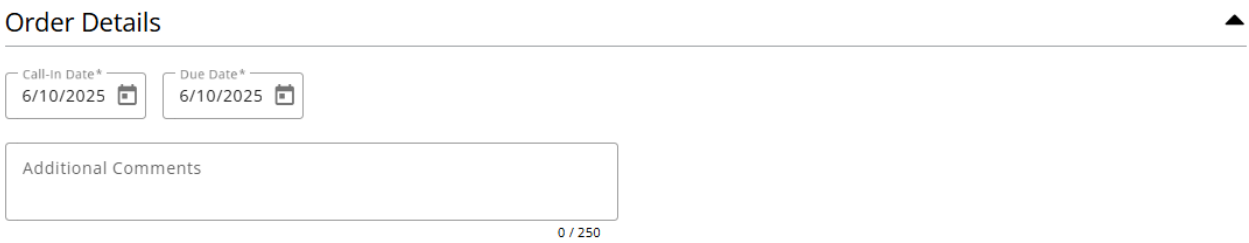
Tank



- Add the Tank to the 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.

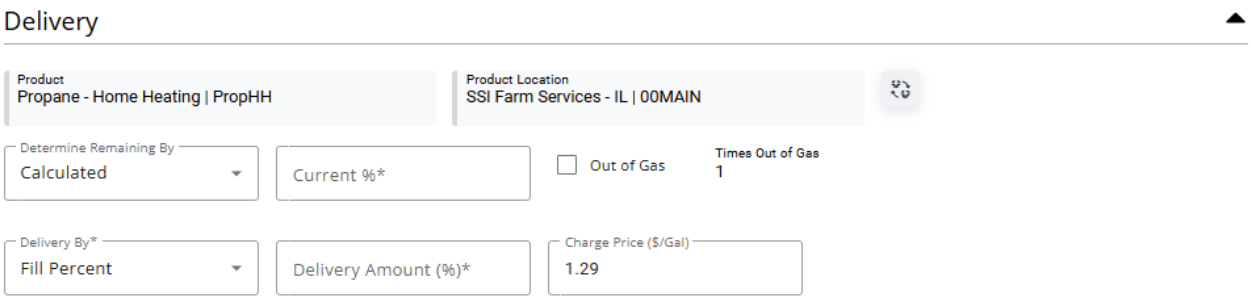
Note: Adding a Tank is required to enter a Product Delivery Order.

Order Details



- **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



- **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 a 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.
  - *Current Tank Percent* on open Product Delivery Orders can be edited.
- **Out of Gas** – Mark the tank 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.

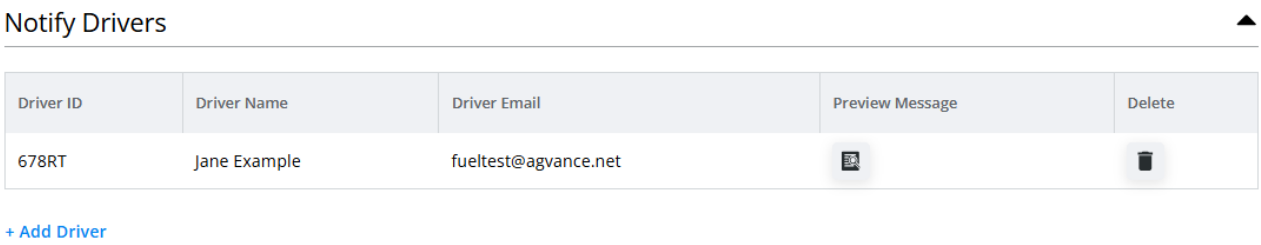
- If *Amount of Purchase* is selected, *Amount of Purchase ($)* displays with an initial value of *0*. This can be changed if needed and has a maximum of four numeric characters.

- **Charge Price** – Price charged per gallon.

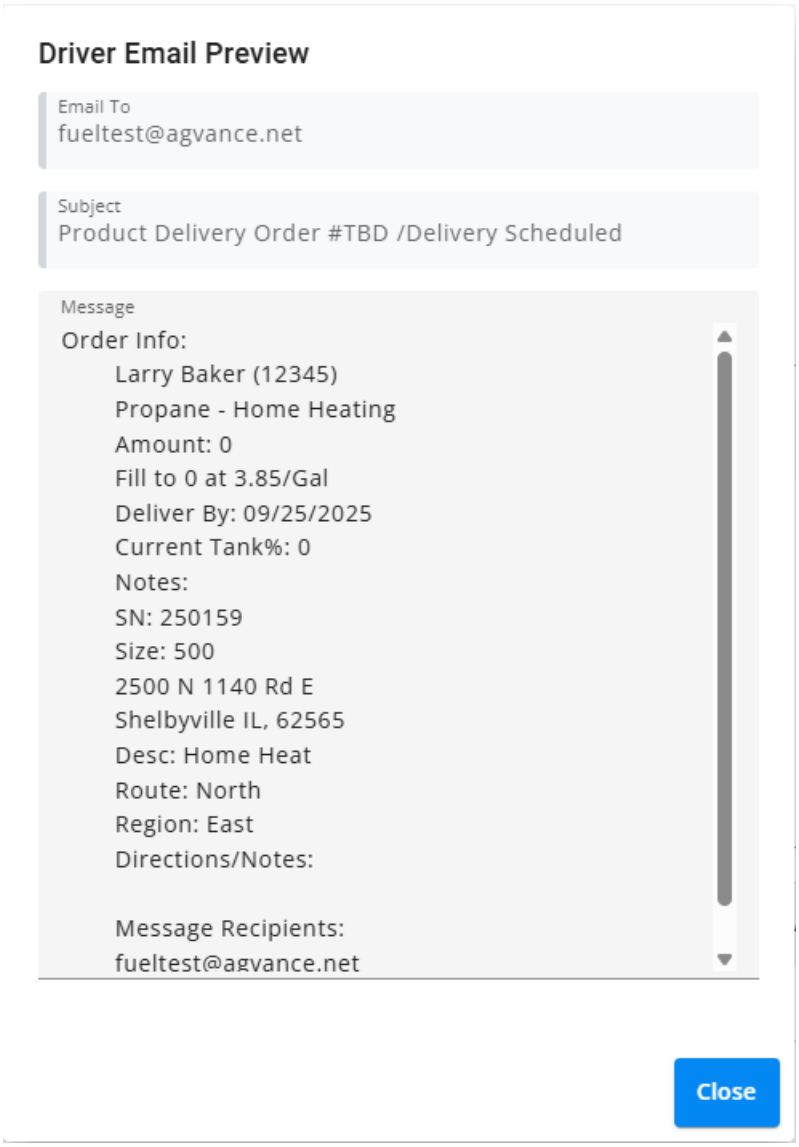
Notify Driver

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 Agvance Windows will display.



- **Driver ID**
- **Driver Name**
- **Driver Email**
- **Preview Message** – Selecting the **Preview Message** icon 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.
    - The *Subject* will read *Product Delivery Order #TBD / Delivery Scheduled*.



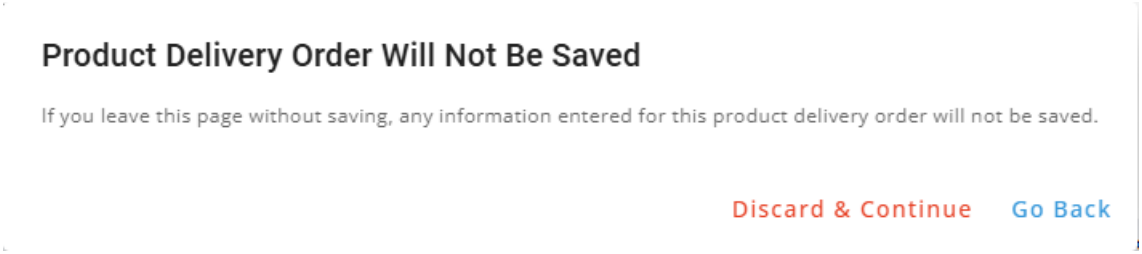
- **Delete** – Removes the selected Driver from receiving notifications.
- **+ Add Driver** – When selected, a Driver search displays to choose from a list of active Drivers.

Saving or Canceling

Selecting **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 **Create Order** is selected 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.



Credit Check

Credit checking happens when adding a tank to a Product Delivery Order, as well as, upon saving.

Note: Set up Credit Management first in Agvance at *Agvance Hub / Agvance Accounting / Setup / Preferences / AR* to check for the following. See the **Credit Management** category for more details.

Check	What it tests
Credit Limit	Customer's available credit vs transaction total
Credit Line	Department / Product Level Credit Line
Credit Status	Hold status, Warning message, Cash-on-Delivery flag, Past Due Invoices

The Product Delivery Order form will be disabled preventing interaction with other fields on the page while credit checking is in progress and must be closed or acknowledged in order to continue entering form details. Form validations must also be passed before credit checking processes on the submit of a PDO at *Agvance SKY Energy / Orders / Add Product Delivery Order*.

Types of Acknowledgements:

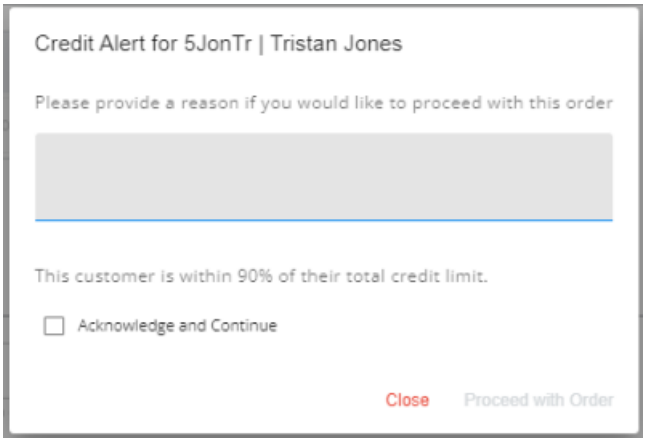
- **Warn** — Acknowledge the credit check information.
- **Authenticate** — A password is required before continuing.
- **Stop** — The process may either be stopped and the customer removed due to account holds, credit limit restrictions, or past-due invoices, or it may continue once the issue has been acknowledged and the necessary corrections have been made.

Warn

Alerts of any acknowledgement or warnings for credit checking rules display when selecting a tank on a Product Delivery Order in Agvance SKY Energy similarly to Agvance Windows.

- Tank selection checks:
  - If any associated tank customer has a custom credit status a warning displays with a checkbox to **Acknowledge and Continue** before selecting **Proceed with Order.** If the acknowledgment is left unchecked the form remains in error state upon trying to proceed.
  - If any associated tank customer has a custom credit status that requires reason for overriding the credit status', a text input area displays in the warning window for a reason up to 255 characters. At least one text character is required to proceed.

    - Cash on Delivery (COD) customers display a warning stating, *This customer is marked as Cash on Delivery only*. Check the Acknowledge and Continue to proceed with the order. If left unchecked, the form remains in error state upon trying to proceed.
    - If any associated tank Customer has a custom credit status that is past due the warning displays, *This customer's account is currently 100 days past due.* Check the Acknowledge and Continue to proceed with the order. If left unchecked, the form remains in error state upon trying to proceed.
    - If the Customer is over their credit limit check the Acknowledge and Continue to proceed with the order.
- PDO Save checks:
    - If the order puts the customer within the set percentage of the credit limit a warning displays with a checkbox to **Acknowledge and Continue** before selecting **Proceed with Order.**
        - For example, *This customer is within 90% of their total credit limit.*



    - If the order puts the customer over their credit limit a Stop alert displays to acknowledge before continuing.
        - For example, *This customer has exceeded their credit limit. Please remove them to continue with the order*.

Authenticate

If a Customer requires a credit check password when adding a PDO at*Agvance SKY Energy / Orders / Add Product Delivery Order*, an alert displays for the credit check password input field before continuing with the order. A message also displays if any associated tank Customer has a custom credit status that exceeds the limit and requires a password to continue. Credit Check passwords must match those set up in Agvance and if mistyped will prevent continuing.

Stop

For customers configured with credit stop alerts, the system displays an alert showing the applicable stop rule or credit check when tanks are added to PDOs in *Agvance SKY Energy / Orders*. Depending on the credit checking preferences, the message warns that the Customer has met or exceeded the credit limit or has a loaded, unprocessed Delivery Ticket.

- Tank selection stop rules:
    - If any associated tank Customer is on hold the following message displays in the warning window:

        - *This customer is on hold. To proceed, please create this order in the Agvance Windows Accounting program.*
    - If any associated tank Customer has a Credit Limit the following message displays in the warning window:
        - *This customer has exceeded their credit limit. Please remove them to continue with the order.*
    - If any associated tank has Past Due Invoices the following message displays in the warning window:
        - *This customer's account is currently (# of days past due) days past due. Please remove them to continue with the order.*
    - The process will then run through any other customers tied to the Tank; like active customers that are on any billing or rental splits with the tank.
- PDO save stop rules:
    - If any associated Customer to this tank is on hold the following message displays in the warning window:
        - *This customer is on hold. To proceed, please create this order in the Agvance Windows Accounting program.*
    - If any associated tank Customer has a Credit Limit the following message displays in the warning window:
        - *This customer has exceeded their credit limit. Please remove them to continue with the order.*
    - If any associated Customer to this tank is past due the following message displays in the warning window:
        - *This customer's account is currently (# of days past due) past due. Please remove them to continue with the order.*