

Adding Equipment Guide

This guide explains how to add equipment to a system using the Add/Edit Equipment dialog. Equipment represents physical components like tanks, regulators, filters, and other equipment.

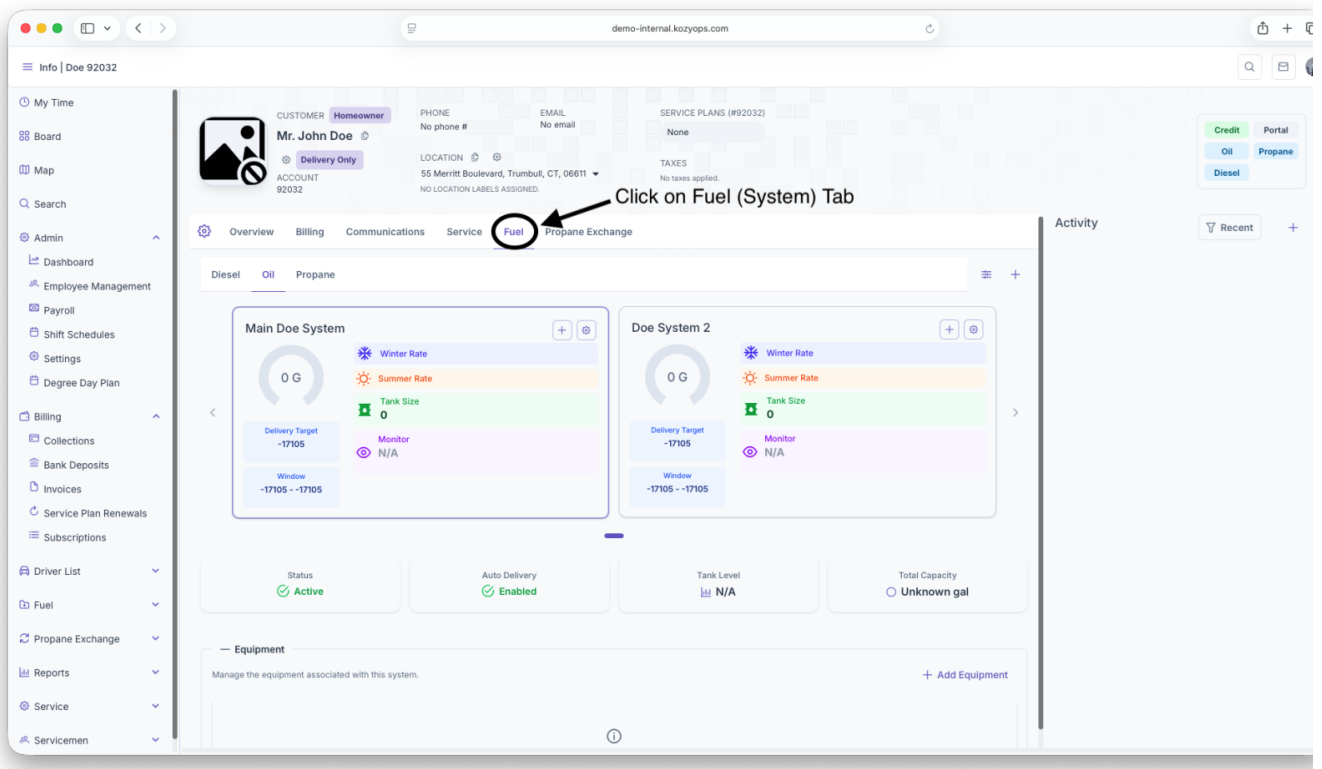
“ **Key concept:** You can add multiple tanks to a system when they share the same fill connection. Each piece of equipment is tracked separately within the system.

Prerequisites

- A system must exist for the location. See [Add System](#) if you need to create one first.
- You are on the Customer Dashboard with the correct Location selected.

Add equipment to a system

1. Navigate to the **Systems** section from the Customer Dashboard.



2. Select the system you want to add equipment to.

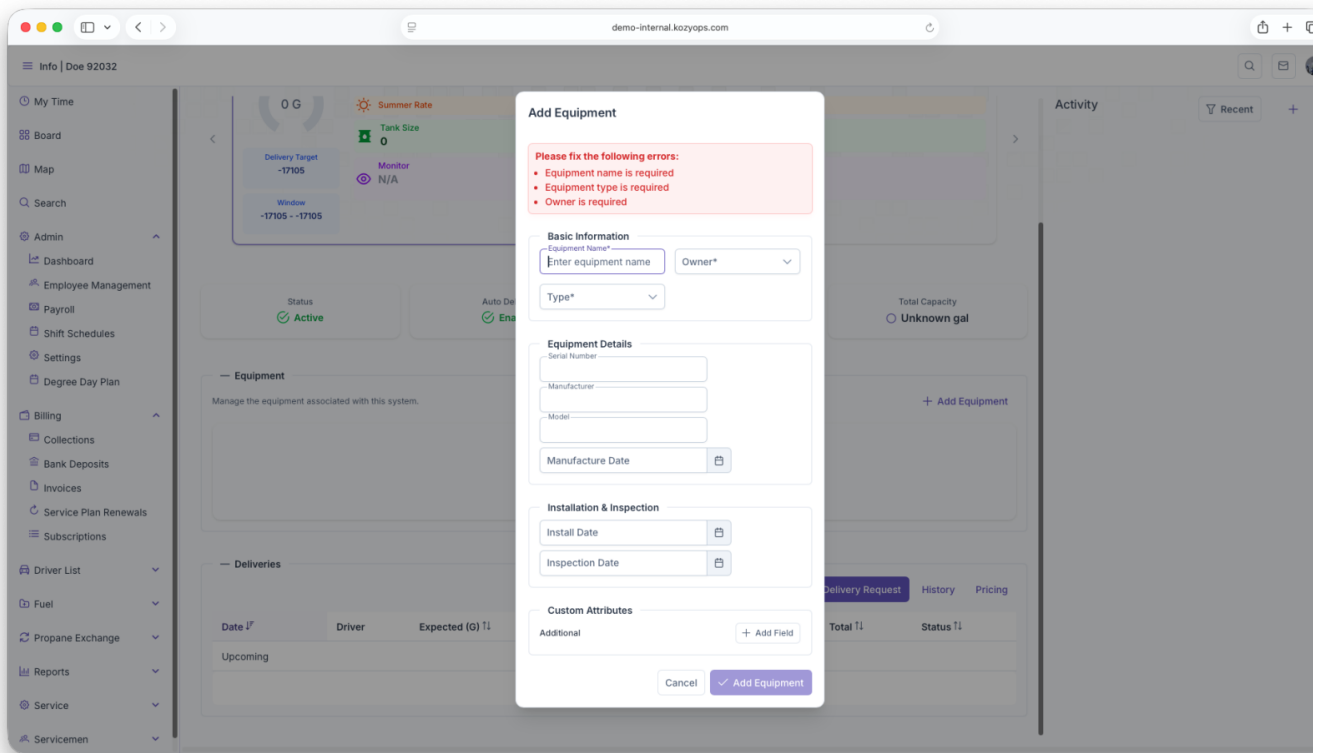
The screenshot shows a web application interface for a customer named Mr. John Doe. The main content area displays two system cards: 'Main Doe System' and 'Doe System 2'. The 'Main Doe System' card is highlighted with a blue border and contains the following information: Winter Rate (blue icon), Summer Rate (orange icon), Tank Size 80 (green icon), Delivery Target -17105 (blue icon), Monitor N/A (purple icon), and Window -17105 - -17105 (blue icon). Below the cards are four status boxes: Status Active (green checkmark), Auto Delivery Enabled (green checkmark), Tank Level N/A (blue icon), and Total Capacity 80 gal (blue icon). At the bottom, there is an 'Equipment' section with a '+ Add Equipment' button. An arrow points from the text 'Select System to Add Equipment to' to the 'Main Doe System' card.

3. Click **Add Tank** or **Add Equipment**.

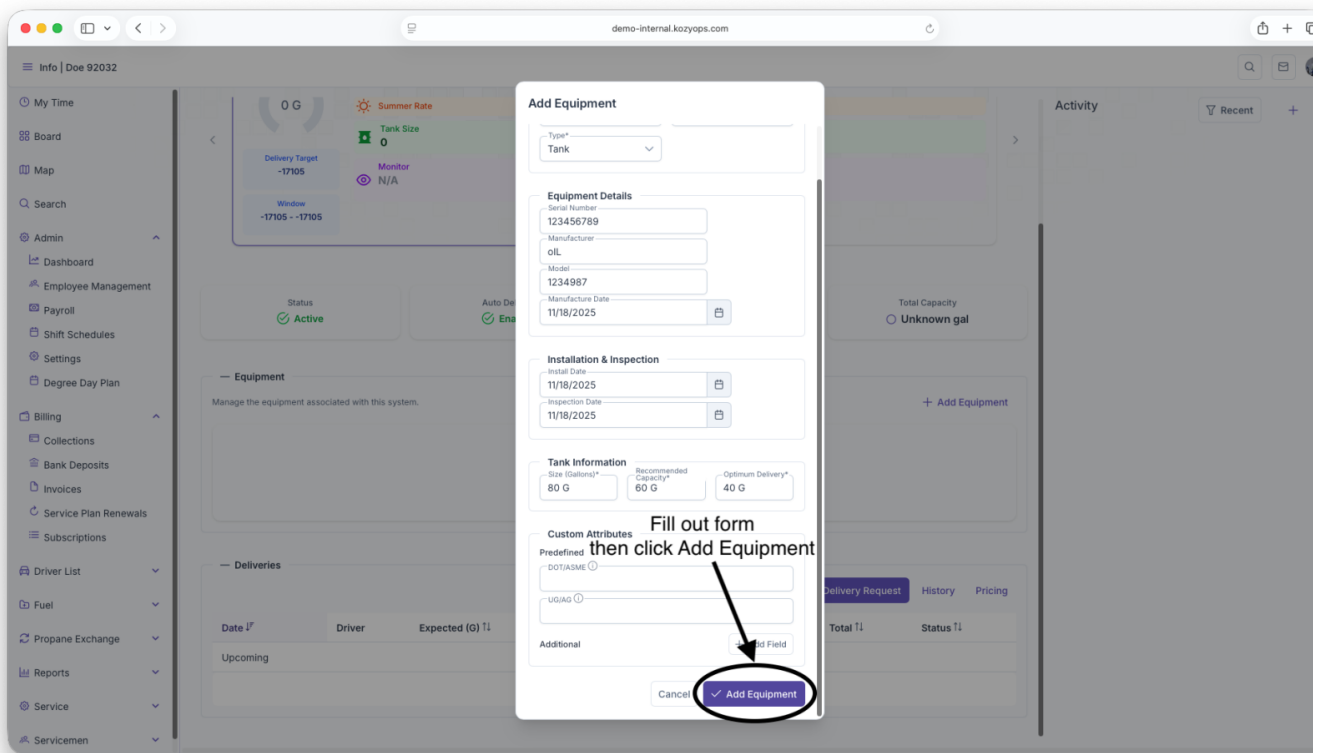
The screenshot shows the same software interface as above, but with the 'Equipment' section expanded. The 'Equipment' section contains the text 'Manage the equipment associated with this system.' and a '+ Add Equipment' button, which is circled in red. Below this section is a 'Deliveries' section with a table. The table has columns for Date, Driver, Expected (G) Tl, Delivered (G) Tl, Price Tl, Total Tl, and Status Tl. The table is currently empty. An arrow points from the text 'Click on Add Equipment' to the '+ Add Equipment' button.

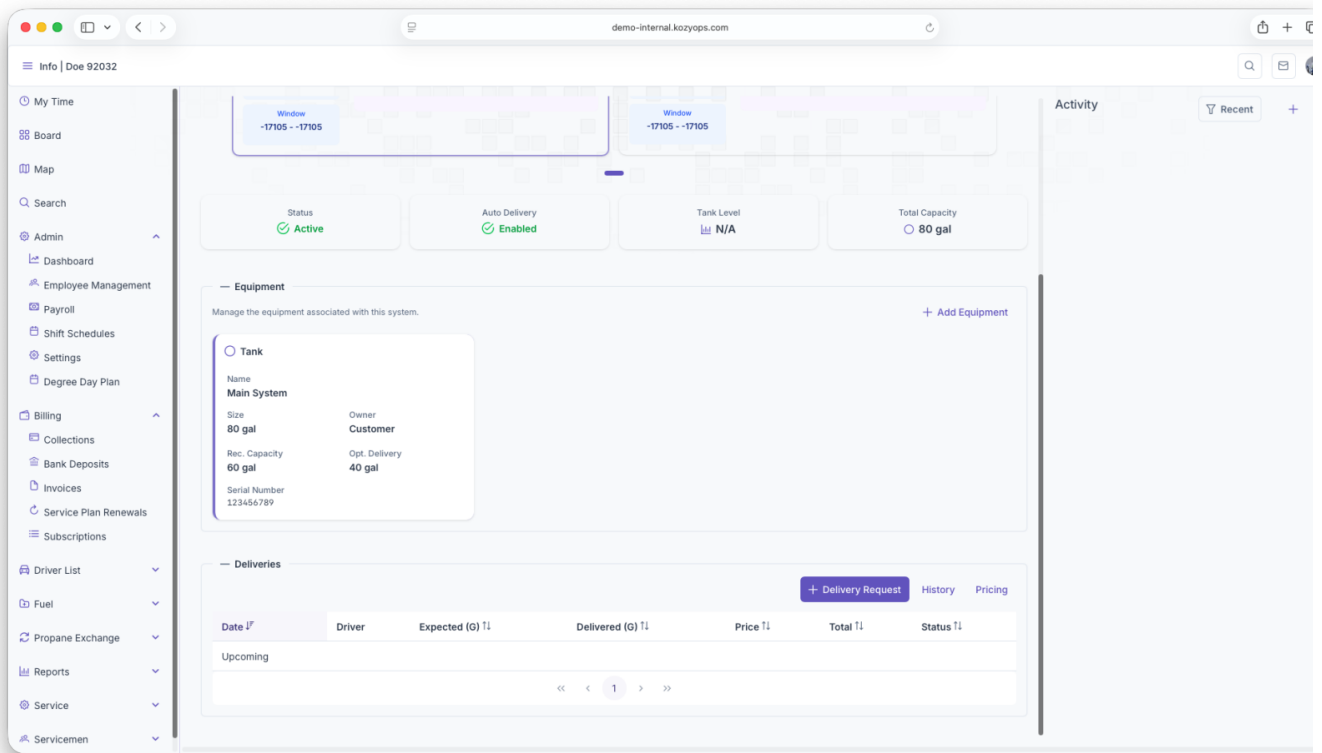
Date Tl	Driver	Expected (G) Tl	Delivered (G) Tl	Price Tl	Total Tl	Status Tl
Upcoming						

4. The Add Equipment dialog opens with multiple sections.



5. Fill out the required fields and click **Add Equipment** or **Update Equipment**.





Equipment types

The dialog supports these equipment types:

- **Tank:** Storage tanks for fuel (propane, oil)
- **Regulator:** Pressure regulation equipment (requires expiration date)
- **Filter:** Filtration equipment
- **Other Equipment:** Custom equipment types

Basic Information section

Required fields

- **Equipment Name:** Clear identifier for the equipment
- **Owner:** Select "Customer" or "Internal"
- **Type:** Tank, Regulator, Filter, or Other Equipment

All three fields are required to proceed.

Equipment Details section

Serial Number

- **Required if Owner is "Internal"**
- Optional for customer-owned equipment
- Used for warranty and service tracking

Optional fields

- **Manufacturer:** Equipment manufacturer name
 - **Model:** Model number or designation
 - **Manufacture Date:** When the equipment was manufactured (date picker with Luxon support)
-

Installation & Inspection section

Both fields are optional:

- **Install Date:** When the equipment was installed or replaced
- **Inspection Date:** Most recent inspection date

Use date pickers to select dates.

Regulator Information (regulators only)

If you selected **Type = Regulator**, an additional section appears:

Required field

- **Expiration Date:** When the regulator expires and needs replacement (required for regulators)

This field uses a date picker and is mandatory for regulator equipment.

Tank Information (tanks only)

If you selected **Type = Tank**, an additional section appears with three required fields:

Required fields (all with gallon suffix)

- **Size (Gallons):** Total tank size capacity
 - Supports up to 3 decimal places
 - Minimum value: 1 gallon
- **Recommended Capacity:** The recommended fill capacity (typically 80-90% of total size)
 - Supports up to 3 decimal places
 - Minimum value: 1 gallon
 - Used for delivery calculations
- **Optimum Delivery:** The optimal delivery amount for this tank
 - Supports up to 3 decimal places
 - Minimum value: 1 gallon
 - Used for routing and delivery planning

Example for a 275-gallon tank:

- Size: 275 gallons
 - Recommended Capacity: 247 gallons (90% of 275)
 - Optimum Delivery: 200 gallons
-

Multiple tanks on one system

When you have multiple tanks sharing the same fill connection:

1. **Add each tank as separate equipment** to the same system
2. Enter accurate Size, Recommended Capacity, and Optimum Delivery for each tank
3. The system automatically aggregates capacity across all tanks for delivery calculations

Example setup:

- System: "Main Propane System"
- Tank 1: 500 gallons (450 recommended, 400 optimum)
- Tank 2: 500 gallons (450 recommended, 400 optimum)
- Total system capacity: 1000 gallons (900 recommended)

This approach allows accurate tracking of individual tanks while calculating deliveries for the combined system.

Custom Attributes section

Always visible at the bottom of the dialog:

Predefined custom fields

- Loaded from the API based on equipment type
- Each field shows with a label and optional description tooltip
- Enter values as needed for your tracking requirements

Additional custom fields

- Click **Add Field** to create custom key-value metadata
- Enter **Field Name** and **Value**
- Remove fields with the trash icon button
- Useful for tracking location-specific or custom attributes

Validation and submission

The dialog validates your entries:

- **Validation errors** appear at the top in a red message box
- Common errors:
 - Missing required fields (Name, Owner, Type)
 - Serial number required for Internal-owned equipment
 - Expiration date required for regulators
 - Tank size, recommended capacity, and optimum delivery required for tanks
 - Values must be > 0 for numeric fields

The **Add Equipment** or **Update Equipment** button is disabled until all validation passes.

Dialog actions

- **Cancel**: Close the dialog without saving changes
- **Add Equipment** (for new): Save the new equipment to the system
- **Update Equipment** (for existing): Save changes to existing equipment

After saving, the equipment appears in the system's equipment list and can be used for delivery projections, monitoring, and service tracking.

Editing or removing equipment

- To **edit**: Click the equipment row or Edit button, make changes, and click **Update Equipment**
 - To **remove**: Use the delete/remove action (typically with confirmation)
 - Be cautious if the equipment is linked to active monitors or services
-

Related guides

- [Add System](#) — Create the parent system first
 - [Editing a System](#) — Modify system details
 - [Monitoring](#) — Link tank monitors to equipment
 - [Window Strategies](#) — Configure delivery estimation using equipment data
 - [Add Services](#) — Products and service plans for the customer
-

Revision #2

Created 24 October 2025 18:30:46 by Kozy Operations

Updated 26 December 2025 18:33:04 by Kozy Operations