

Adding Services

Introduction

Services refers to account-level Products and Service Plans that apply to a specific Customer and Location (e.g., service plans, fuel delivery, service contracts, etc).

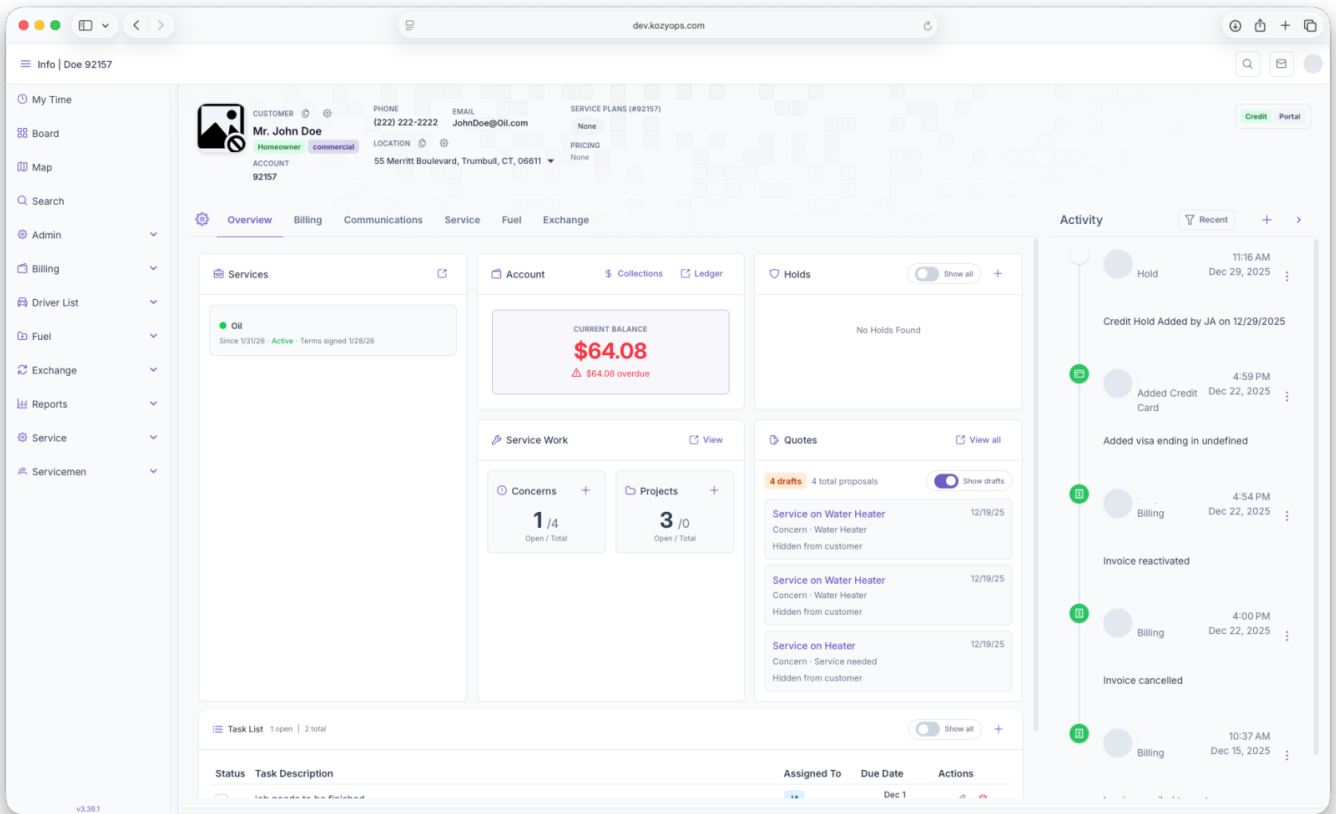
What a “Service” is here

- A Product/Service Plan record associated with a Customer + Location
- Examples: Service Plan/Contract, Budget Plan, Prebuy, Price Cap, Preferred Program
- Tracked with start/end dates, T&C, salesperson, lead source, incentives, and notes

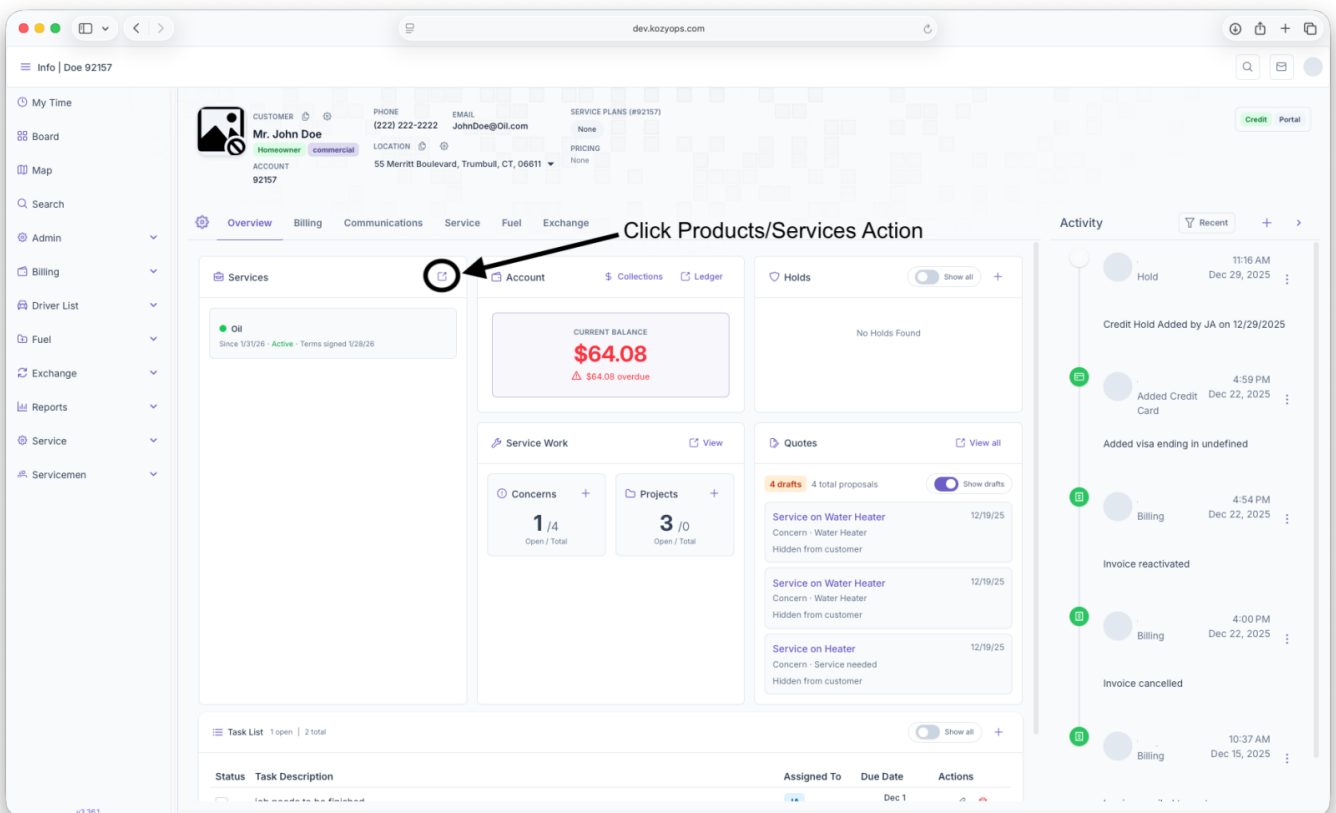
Delivery scheduling lives on systems. To configure automatic deliveries, edit the System and pick a Window Strategy (Degree Day, Monitored, or Calendar). See: [Understanding Window Strategies](#)

Open the Products (Services) dialog

1. Go to the Customer Dashboard and select the Customer and Location in the header



2. Open the Products/Services action to launch the Products dialog



3. You'll see a table of existing products for this customer + location and actions at the top

Services

[+ Add Service](#) [Create Service Plan Invoice](#) << < 1 > >> 5 ▾

Service	Start	End	T&C	Salesman	Source	Incentives	Quit Notes
oil	Jan 31, 2026		✓				
oil	Jan 13, 2026	Jan 13, 2026	✓				
oil	Dec 2, 2025	Jan 13, 2026	✓				

[Close](#)

Actions in the dialog

- Add Product — Opens a form to add a new product/service plan

Services

Click Add Service

[+ Add Service](#) [Create Service Plan Invoice](#) << < 1 > >> 5 ▾

Service	Start	End	T&C	Salesman	Source	Incentives	Quit Notes
oil	Jan 31, 2026		✓				
oil	Jan 13, 2026	Jan 13, 2026	✓				
oil	Dec 2, 2025	Jan 13, 2026	✓				

[Close](#)

Add Service



Service Details

Configure the service type and salesman

Service Type



Salesman



Dates & Source

Service start date, lead source, and terms

Start Date



Lead Source



Signed Terms



Incentives

0 incentives configured

+ Add



No incentives added yet



End Service

Configure service termination



① New service

X Cancel

✓ Save Service

- Create Service Plan Invoice — Opens a small dialog to generate an invoice for a plan

Services

Click Create Service Plan Invoice

+ Add Service

Create Service Plan Invoice



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Service	Start	End	T&C	Salesman	Source	Incentives	Quit Notes
oil	Jan 31, 2026		✓				
oil	Jan 13, 2026	Jan 13, 2026	✓				
oil	Dec 2, 2025	Jan 13, 2026	✓				

Close

Add Service Plan

Service Plan Type

Level

End Year

- Click any row — Opens the product in edit mode

Services

<< < 1 > >> 5

Service	Start	End	T&C	Salesman	Source	Incentives	Quit Notes
oil	Jan 31, 2026		✓				
oil	Jan 13, 2026	Jan 13, 2026	✓				
oil	Dec 2, 2025	Jan 13, 2026	✓				

Double Click to edit existing Service

Edit Service



Service Details

Configure the service type and salesman

Service Type

Oil Delivery

Salesman



Dates & Source

Service start date, lead source, and terms

Start Date

01/31/2026



Lead Source



Signed Terms

01/28/2026



Incentives

0 incentives configured

+ Add



No incentives added yet



End Service

Configure service termination



Updated 5 days ago

Cancel

Save Service

- Close — Dismisses the dialog (changes are returned to the caller)

Services

+ Add Service

Create Service Plan Invoice



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Service	Start	End	T&C	Salesman	Source	Incentives	Quit Notes
oil	Jan 31, 2026		✓				
oil	Jan 13, 2026	Jan 13, 2026	✓				
oil	Dec 2, 2025	Jan 13, 2026	✓				

Click Close

Close

Table columns (what you'll see)

- Product — The product/service type (e.g., ServicePlan, BudgetPlan, etc.)
- Start — Start date of the product
- End — End/Quit date (if ended)
- T&C — Signed Terms indicator (checkmark shows date tooltip if signed)
- Salesman — Assigned employee/salesperson
- Source — Lead source
- Incentives — List of attached incentive descriptions
- Quit Notes — Notes captured when ending/quitting a product

Services

Table Columns

+ Add Service Create Service Plan Invoice << < 1 > >> 5 ▾

Service	Start	End	T&C	Salesman	Source	Incentives	Quit Notes
oil	Jan 31, 2026		✓				
oil	Jan 13, 2026	Jan 13, 2026	✓				
oil	Dec 2, 2025	Jan 13, 2026	✓				

Close


Add or Edit a Product

When you click Add Product (or click an existing row), a full form opens to create or edit the product.


You can expect fields such as:

Add Service





 **Service Details**
Configure the service type and salesman


Service Type Salesman

 **Dates & Source**
Service start date, lead source, and terms

Start Date Lead Source Signed Terms

 **Incentives**
0 incentives configured


No incentives added yet

 **End Service** -
Configure service termination

Quit Date

New service

- Product Type — The product/service category
- Start Date — When the product becomes active
- End/Quit Date — When the product ends (optional)
- Signed Terms — Mark T&C as signed (stores date)
- Salesperson — Assign employee responsible
- Lead Source — Track where it came from
- Incentives — Add one or more incentive lines
- Quit Notes — Reason/context when ending a product

After saving, the table will update. If you close with changes, those updates are returned to the caller of the dialog.

Scope and relationships

- Products are stored per Customer + Location (they don't belong to a System)
- Delivery services are not created here; they're implicit via System setup
- To associate deliveries with tanks/equipment, configure the System under the same location

For delivery automation, open the System dialog and set:

- Window Strategy: Degree Day, Monitored, or Calendar
- Auto Delivery toggle: On to allow automatic requests

See: [Adding a System Guide](#) and [Understanding Window Strategies](#)

Tips & Validation

- If you need a one-off Service Plan invoice, use "Create Service Plan Invoice" from the Products dialog
 - Keep T&C in sync — update Signed Terms when you receive the signed document
 - Use Quit Notes for clarity when ending a product
 - If you don't see any products, you can add your first one with Add Product
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Related guides

- Account setup: [Adding a New Customer](#)
 - Locations and systems: [Location Management](#), [Adding a System Guide](#), [Adding Equipment Guide](#)
 - Delivery automation: [Understanding Window Strategies](#), [Understanding Degree Days](#), [Understanding Fuel Monitoring](#), [Understanding Calendar Schedules](#)
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