

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.

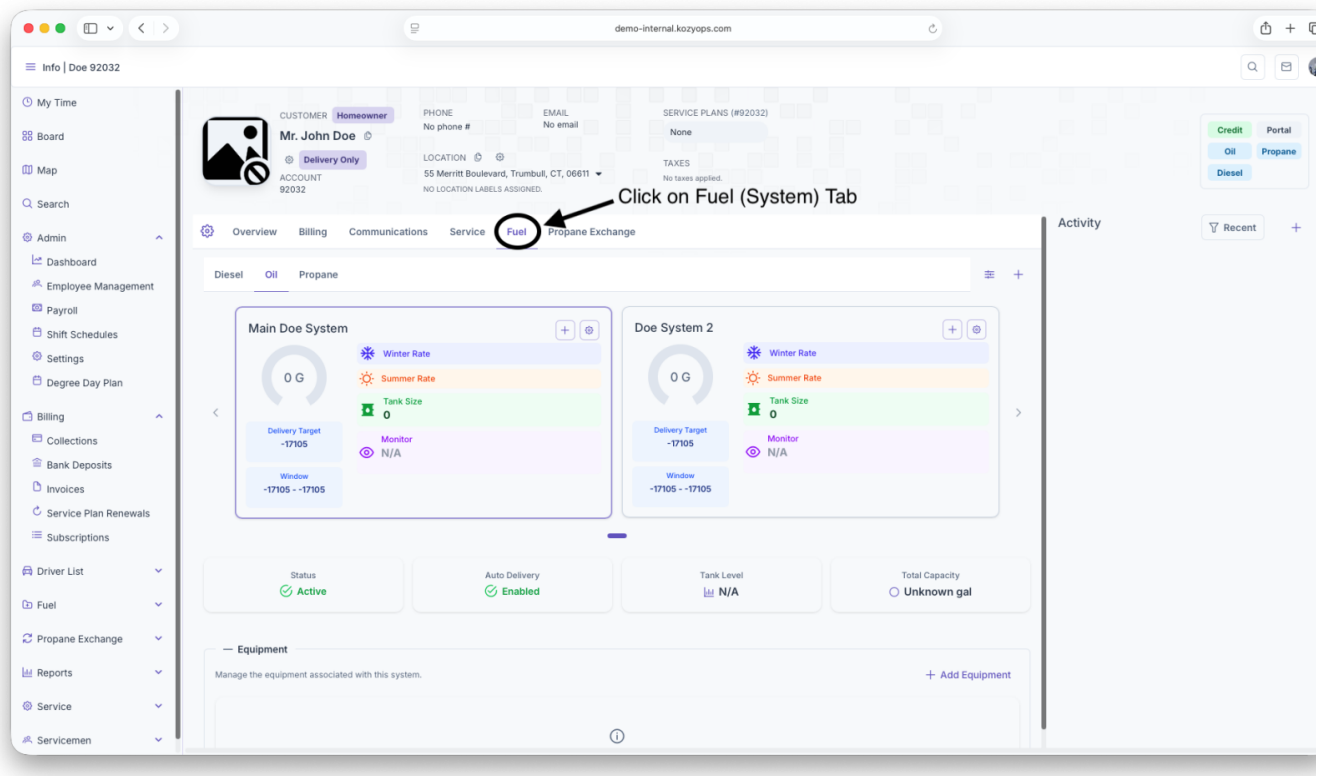
Key concept: You can add multiple tanks to a system when they share the same fill connection. Each piece of equipment is tracked separately within the system.

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 the 'Info | Doe 92032' page. At the top, customer information for Mr. John Doe is displayed. Below this, a navigation bar includes 'Overview', 'Billing', 'Communications', 'Service', 'Fuel', and 'Propane Exchange'. The 'Fuel' tab is active, showing a dropdown menu with 'Diesel', 'Oil', and 'Propane'. An arrow points to this menu with the text 'Select System to Add Equipment to'. Below the dropdown, two system cards are visible: 'Main Doe System' and 'Doe System 2'. Each card displays a tank level gauge (0 G), delivery target (-17105), and window (-17105 - -17105). Below the cards, there are status indicators for 'Status' (Active), 'Auto Delivery' (Enabled), 'Tank Level' (N/A), and 'Total Capacity' (80 gal). At the bottom, there is an 'Equipment' section with a '+ Add Equipment' button.

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

The screenshot shows the 'Equipment' section of the application. The 'Main Doe System' card is highlighted. Below the cards, the 'Equipment' section is expanded, showing a message 'No equipment found for this system'. A circled '+ Add Equipment' button is highlighted with an arrow and the text 'Click on Add Equipment'. Below this, the 'Deliveries' section is visible, showing a table with columns: Date, Driver, Expected (G), Delivered (G), Price, Total, and Status. The table is currently empty, and there is a '+ Delivery Request' button.

4. The Add Equipment dialog opens with multiple sections.

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Info | Doe 92032

My Time

Board

Map

Search

Admin

Dashboard

Employee Management

Payroll

Shift Schedules

Settings

Degree Day Plan

Billing

Collections

Bank Deposits

Invoices

Service Plan Renewals

Subscriptions

Driver List

Fuel

Propane Exchange

Reports

Service

Servicemen

0 G

Summer Rate

Tank Size 0

Monitor N/A

Delivery Target -17105

Window -17105 - -17105

Status Active

Auto De

Equipment

Manage the equipment associated with this system.

Deliveries

Date I⁷

Driver

Expected (G) T¹

Upcoming

Delivery Request

History

Pricing

Total T¹

Status T¹

Total Capacity Unknown gal

+ Add Equipment

Add Equipment

Please fix the following errors:

- Equipment name is required
- Equipment type is required
- Owner is required

Basic Information

Equipment Name* Enter equipment name

Owner*

Type*

Equipment Details

Serial Number

Manufacturer

Model

Manufacture Date

Installation & Inspection

Install Date

Inspection Date

Custom Attributes

Additional + Add Field

Cancel Add Equipment

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

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Info | Doe 92032

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Summer Rate

Tank Size 0

Monitor N/A

Delivery Target -17105

Window -17105 - -17105

Status Active

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Equipment

Manage the equipment associated with this system.

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Driver

Expected (G) T¹

Upcoming

Delivery Request

History

Pricing

Total T¹

Status T¹

Total Capacity Unknown gal

+ Add Equipment

Add Equipment

Type* Tank

Equipment Details

Serial Number 123456789

Manufacturer oIL

Model 1234987

Manufacture Date 11/18/2025

Installation & Inspection

Install Date 11/18/2025

Inspection Date 11/18/2025

Tank Information

Size (Gallons)* 80 G

Recommended Capacity* 60 G

Optimum Delivery* 40 G

Custom Attributes

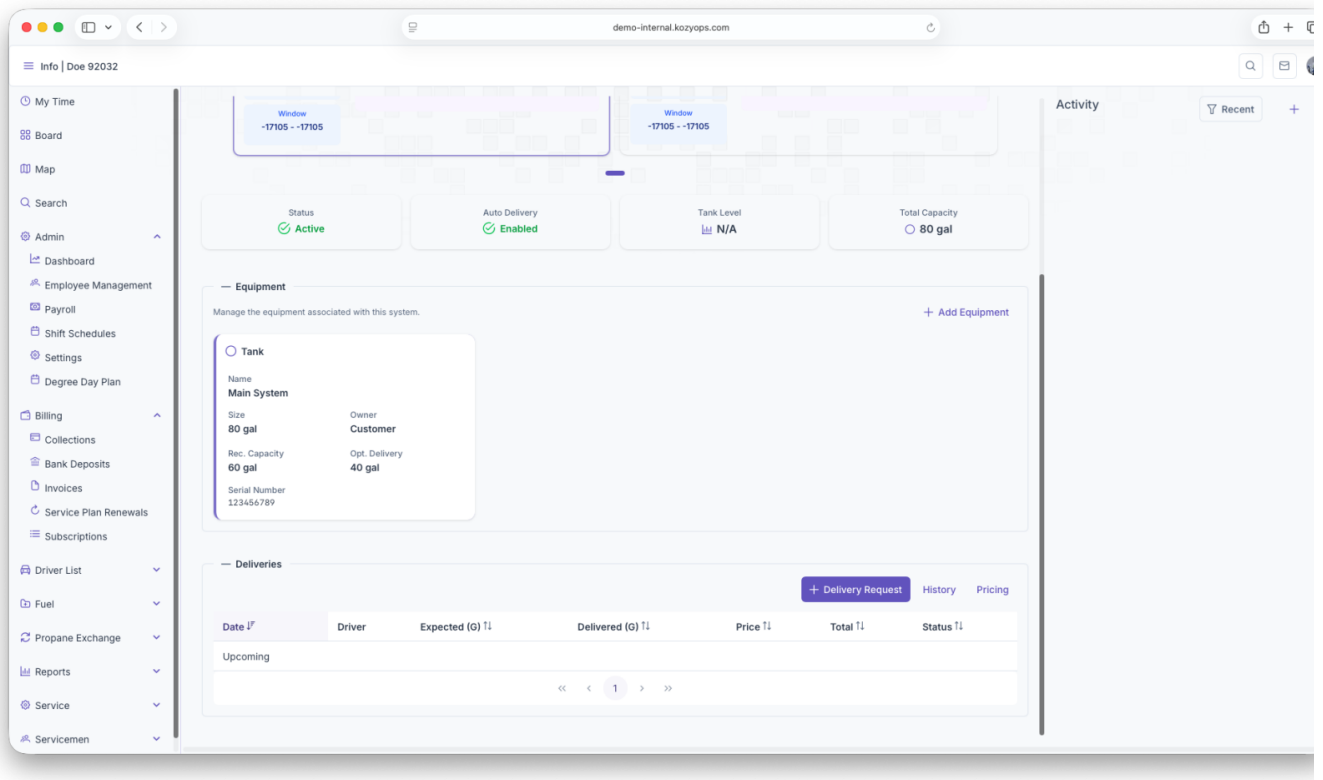
Predefined DOT/ASME

UG/AG

Additional + Add Field

Cancel Add Equipment

Fill out form then click Add 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
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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
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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
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