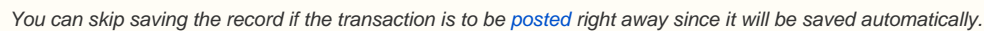


Use the **Tank Delivery** source if the transaction is directly connected to the Tank Management's delivery. When this Source is used, the grid area of the screen will show tank and flow meter related fields.

- **Site No** - Select the list the Consumption Site's site number.
- **% Full** - This field is enabled only when the site number selected has a Tank billing by. Default value is from **Item | Setup tab | Others tab | Default % Full field**. Change the value if necessary.
- **New Meter Reading** - This field is enabled only when the site number has a Flow Meter billing by. Enter the new reading.
- **Prev Meter Reading** - This field is read-only and used only for sites with Flow Meter billing by. Default value is from the last meter reading on Consumption Site record.
- **Conversion** - This field is read only and used only for sites with Flow Meter billing by. Default value is from the conversion factor of the consumption site's flow meter.
- **Performer** - This field is enabled only if the selected Item Number is Service type. Select from the combo list box the name of the performer.

1. Open the **Sales | Invoices menu**. If there is no existing record yet, this will open a new Invoice screen. If not, click the **New button** to open a new Invoice screen.
Some of the fields, like the **Source, Type, Invoice Date, Post Date, Location, Ship Date, Account, Deliver/Pickup, Currency, and Accrual** are already populated by default.
2. Fill out the header details as needed. The required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
 - a. Set **Source to Tank Delivery**. These highlighted columns are the addition to the grid for Tank Delivery.
 - b. Select a **Type**. The options are [Invoice](#), [Debit Memo](#), [Credit Memo](#), [Cash](#), and [Cash Refund](#).
 - c. Select a **Customer**.
 - d. Select a different **Location, Bill To, Ship To, Terms, and Currency** if needed. But don't leave these fields blank.
 - e. Enter other details that you see necessary. Refer to [Invoice | Field Description | Header Details](#) to help you in filling out the fields.
3. Add details on grid.
 - a. If you are to use an item from inventory, complete filling in the **Item No, Shipped, UOM, Price** and other fields necessary to ensure they are appropriate for the customer's invoice.
 - b. Enter the tank or flow meter related fields (defined at the beginning of this topic).
 - c. The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Shipped and Price, and other necessary details.
4. **Save** the record. The **Invoice No** field will be filled in with a unique and system generated number.



Invoice - ABC Reseller

[New](#)
[Save](#)
[Search](#)
[Delete](#)
[Undo](#)
[Print](#)
[Add Shipment](#)
[Email](#)
[Duplicate](#)
[Post](#)
[Recap](#)
[Recurring](#)
[Close](#)

[Details](#)
[Prepays and Credit Memos](#)
[Instructions](#)
[Payments \(0\)](#)
[Attachments \(0\)](#)
[Audit Log \(1\)](#)
[Comments \(0\)](#)

Source: Tank Delivery
Recurring:
Location: 0001 - Fort Wayne
PO Number:
Invoice No: SI-469

Type: Invoice
Bill To: ABC Reseller
Freight Term:
Delivery/Pickup: Pickup
Split:

Customer: ABC Reseller
Ship To: ABC Reseller
Ship Date: 7/4/2016
Salesperson: Jared Smith

Invoice Date: 7/4/2016
Ship Via: UPS
Account:
Currency: USD
Accrual: 1

Post Date: 7/4/2016
Terms: 5/9, Net 30
Due Date: 8/3/2016
Comments: Tank Delivery

+

Insert

×

Open

×

Remove

+

Add Recp

↶

Get Previous Details

⌵

Layout

🔍

Filter Records (F3)

Item No	Contract No	Sequence	Description	Site No	% Full	New Meter Reading	Prev Meter Reading	Conversion	Performer	Ordered	Order UOM	Shipped	UOM	Discount %	Tax	Sub Cury	Price	Total	Tax Group
<input checked="" type="checkbox"/>	GAS		sample GAS	0001	100.00	0.00	0.00	0.00		0.00			50.00	Gallon	0.00%	11.41	1.850000	92.50	IN SST
<input checked="" type="checkbox"/>	LPG		Propane	0002	0.00	20.00	15.00	3.06		15.302	15.302		Gallon	0.00%	0.00	1.300000	19.89		
<input checked="" type="checkbox"/>					0.00	0.00	0.00	0.00		0.00	0.00			0.00%	0.00	0.000000	0.00		

Bill To:

ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Ship To:

ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Item:

GAS - 87 Unleaded Gasoline

On Hand:

-10.00

Committed:

0.00

On Order (PO):

0.00

Back Order:

0.00

Subtotal:

112.39

Shipping:

0.00

Tax:

11.41

Total:

123.80

Amount Received:

0.00

Amount Due:

123.80

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+

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✉

Saved

Page

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- Updated TM Fields After Synchronization

Use the **Tank Delivery source** if the transaction is directly connected to the Tank Management's delivery. When this Source is used, the grid area of the screen will show tank and flow meter related fields.

Here are the steps in creating a transaction from Tank Delivery.

- Open the **Sales | Invoices** menu. If there is no existing record yet, this will open a new Invoice screen. If not, click the **New button** to open a new Invoice screen.
Some of the fields, like the **Type**, **Invoice Date**, **Post**, **Location**, **Ship Date**, **Deliver/Pickup**, **Currency**, and **Accrual** are already populated by default.
- Fill out the header details as needed. The required details are Customer, Location, Bill To, Ship To, Terms, and Currency.
 - Set Type to Tank Delivery.** These highlighted columns are the addition to the grid for Tank Delivery.

Item No	Contract No	Contract S#	Description	Site No	% Full	New Meter Reading	Prev Meter Reading	Conversion	Performer	Ordered	Order UOM	Shipped	UOM	Discount	Tax	Sub Currency	Price	Total	Weight UOM	Tax Group
					0.00	0.00	0.00	0.00		0.00				0.00	0.00		0.0000	0.00		

 - Site No** - Select the list the Consumption Site's site number.
 - % Full** - This field is enabled only when the site number selected has a Tank billing by. Default value is from **Item | Setup tab | Others tab | Default % Full field**. Change the value if necessary.
 - New Meter Reading** - This field is enabled only when the site number has a Flow Meter billing by. Enter the new reading.
 - Prev Meter Reading** - This field is read-only and used only for sites with Flow Meter billing by. Default value is from the last meter reading on Consumption Site record.
 - Conversion** - This field is read only and used only for sites with Flow Meter billing by. Default value is from the conversion factor of the consumption site's flow meter.
 - Performer** - This field is enabled only if the selected Item Number is Service type. Select from the combo list box the name of the performer.
 - Select a **Customer**.
 - Select a different **Location**, **Bill To**, **Ship To**, **Terms**, and **Currency** if needed. But don't leave these fields blank.
 - Enter other details that you see necessary. Refer to **Invoice | Field Description | Header Details** to help you in filling out the fields.
- Add details on grid. Refer to item 2.a for the definition of the tank delivery related fields. Note that **UOM** is a required detail.
 - If you are to use an item from inventory, complete filling in the **Item No**, **Shipped**, **UOM**, **Price** and other fields necessary to ensure they are appropriate for the customer's invoice.
 - The grid will also allow you to enter **miscellaneous items** that do not have an Inventory Item record. You can do this by not selecting an Item No and simply entering its Description, Shipped and Price, and other necessary details.
- Save** the record. The **Invoice No** field will be filled in with a unique and system generated number.



You can skip saving the record if the transaction is to be **posted** right away since it will be saved automatically.

Here is a sample invoice from Tank Delivery. Posting this invoice will update the associated fields on Tank Management | Consumption Site.

Invoice - ABC Reseller

New Save Search Delete Undo Print Add Shipment Email Duplicate Post Recap Recurring Close

Details Instructions Payments (0) Attachments (0) Audit Log Comments

Type: Tank Delivery Recurring: Bill To: ABC Reseller Freight Terms: Invoice No: SI-719 Split: BOL Number: PO Numbers: Deliver/Pickup: Customer: ABC Reseller Ship To: ABC Reseller Salesperson: Jared Smith Currency: USD Invoice Date: 07/04/2016 Post: 07/04/2016 Ship Via: UPS Due Date: 08/03/2016 Location: 0001 - Fort Wayne Terms: 5/6 5, Net 30 Accrual: 1 Ship Date: 07/04/2016 Comments: comment maintenance

Item No	Contract No	Contract S#	Description	Site No	% Full	New Meter Reading	Prev Meter Reading	Conversion	Performer	Ordered	Order UOM	Shipped	UOM	Discount	Tax	Sub Currency	Price	Total	Weight UOM	Tax Group
1			Propane	0002	0.00	20.00	15.00	3.06		15.302	15.302	Gallon		0.00%	0.00		1.300000	25.00		IN SST
2			GAS	87 Unlead...	0001	100.00	0.00	0.00		0.00	50.00	Gallon		0.00%	11.41		1.850000	92.50		IN SST
3					0.00	0.00	0.00	0.00		0.00	0.00			0.00%	0.00		0.000000	0.00		

Bill To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Ship To: ABC Reseller
Somewhere St.
Indianapolis, IN, 46204 United States

Item: On Hand: On Order (PO): Subtotal: 118.50
Committed: Back Order: Shipping: 0.00
Tax: 11.41
Total: 129.91

Ready 1 of 1