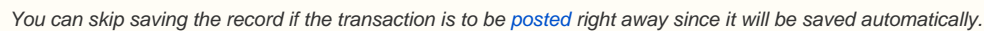# How to Create Invoice from Tank Delivery

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.

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

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.

> ⚠️ 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/synchronize the respective fields on Tank Management | Consumption Site.

Related Topics

- Updated TM Fields After Synchronization

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   a. Set **Type** to **Tank Delivery**. These highlighted columns are the addition to the grid for Tank Delivery.

      i. **Site No** - Select the list the Consumption Site's site number.
      ii. **% 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.
      iii. **New Meter Reading** - This field is enabled only when the site number has a Flow Meter billing by. Enter the new reading.
      iv. **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.
      v. **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.
      vi. **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.
   b. Select a **Customer**.
   c. Select a different **Location**, **Bill To**, **Ship To**, **Terms**, and **Currency** if needed. But don't leave these fields blank.
   d. 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. Refer to item 2.a for the definition of the tank delivery related fields. Note that **UOM** is a required detail.
   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. 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.
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