## How to Synchronize Data from i21 AR to Tank Management

- 1. On the Sales Menu panel, click the Invoice menu. This will open the Invoice Search screen.
- 2. Click the **New toolbar button** to create a new invoice.

Invoi	ce															
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Invoice -																^ 🗆 ×
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Type:	Invoice v Bill To:							$\sim$	Freight Term:		~	Deliver/Pickup:		V Split:		
Customer				~	Ship To:	Ship To: 🗸					07/04/2016		Salesperson:			~
Invoice Date:	07/04/2	2016			Ship Via:				$\sim$	Account	12000-0000	-000 ~	Currency:	USD	✓ Accrual: 1	~
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ltem	n No.	Contract No.	Sequence	Description	Ordere	d Order UOM	Shipped	UOM D	scour	nt % Tax	Sub Currency	Price	Total Tax Group	Weight	UOM Storage Loca	stion Sub Location
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Bill To:					Item:								Subtotal:			0.00
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Ship To:													Amount Recei	ved:		0.00
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- 3. Enter the invoice details such as the Customer, Location, Salesperson and Item details.
- 4. Make sure that the **Source field** is set to **Tank Delivery** since this is the assign source for invoices/credit memo that can be synced to Tank Management. For the item detail, make sure that there is a corresponding **Site No** selected for the item.

invoice - cu	stomer A												
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Details	Prepaids and Credit Memos   Instructions   Payments	(0) Attachments (0) Audit Log	g (2) Comments (0)										
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Type:	Invoice	v Bill To: Locat	tion A	~	Freight Term:		~	Deliver/Pickup:	v Split:	~			
Customer	Customer A	v Ship To: Locat	tion A	~	Ship Date:	07/04/2016	5	Salesperson:	Customer C	~			
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+ Insert	Q, Open X Remove 🔡 Add Recipe 🗅 Get Pre	vious Details 🔠 Layout 🔍	Filter Records (F3)							25			
	em No. Contract No Sequence Description	Site No % Full New Meter F	Prev Meter Conversion Performer	Ordered Order UOM	Shipped UO	M Discount %	Tax Sub Currency	Price T	otal Tax Group Weight UOM Sti	rage Location Sub Location			
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		Committed:		Back Order:				Tax		98.40			
Ship To:	Location A 1234 Main St.							Total:		1,328.40			
	Fort Wayne, IN, 46801 United States							Amount Due:	160	1 328.40			

- 5. After entering the details, click the Save toolbar button. The invoice will remain unposted but will save the entered details.
- Click the Post toolbar button. Once the invoice is posted, the data and values of the invoice will sync and reltect automatically to Tank Management's customer site.

invoice - cus	aomer A																						
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Invoice Date	voice Date: 07/04/2016						Ship Via:	1					Account		000-0000-000			Currency:	USD	Acc	rual: 1		
Post Date:	Post Date: 07/04/2016						Terms:	Due on Rece	pt Due	Date: 07	7/04/2016							Comments:					
+ Insert	+ Insert 🔍 Open 🗙 Remove 🛱 Add Recipe 🕒 Get Previous Details							E Layout Q. Filter Records (F3)															20
Ite	sm No.	Contract No	o Sequenci	e Description	Site No	% Full	New h	Aeter Prev Met	er Conversion	Performe	er Ordered	Order UOM	Shipped	UOM	Discount %	Tax	Sub Currency	Price	Total	Tax Group	Weight UON	Storage Locatio	n Sub Location
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