How to Synchronize Data from Origin to Tank Management

- 1. Prerequisites to this process:
 - a. The Consumption Sites record should be properly set up.
 - b. The Clock Reading used in the Consumption Sites should have a valid clock reading record.
 - c. Origin Invoice has been posted with a valid Consumption Site.
 - i. Origin Posting creates the delivery record for the Consumption Sites record to be synchronized.
 - ii. Delivery Record is shown in the tbITMCOBOLWRITE table. Below is a sample data. ber BulkF 001 ent... InvoiceType SalesPersonID 2016010 PROPANE
- 2. On the Menu panel, click the Synchronize Delivery History menu. This will open the Sync Delivery History screen.

Tank Management

Activities	Maintenance	Reports		
Clock Reading	Consumption Sites	Call Entry Printout		
Synchronize Delivery History	Customer Inquiry	Deliveries		
Generate Orders	Devices	Delivery Fill		
Tank Monitor		Events		
Generate Work Orders		Work Orders		
Lease				
Budget Calculation				
Virtual Meter Billing				

3. Click the Sync toolbar button to proceed with the sync.

Sync Delive	ry History	^	×
Sync Reso	olve Conflicts Cancel		
Details			
Click the	e Sync button to sync	the deliveries	
? 🔘 🤇	🖓 Ready		
Syncing Records proc	ess message will display. This will d	etermine the invoice date	e that the sys

4 tem currently syncs.



5. Once the process has been completed, an alert message about the outcome of the process will be displayed. Here is a sample message.



iRely i21

The system successfully processed 1 record(s)



iRely i21

The system successfully processed 1 record(s) with 1 error(s)!



iRely i21

The system failed to process all of the records!



- 6. Click the **OK button** on the alert message.
- 7. If there are records that failed the process, click the **Resolve Sync Conflict toolbar button** in the **Sync Delivery History** screen. This will open the **Resolve Sync Conflicts screen** which lists down all the records that failed the synchronization process, as well as the reason for its failure.
- 1. Prerequisites to this process:
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 BullPlantNum.
 InvoiceIlumber
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Syncing Records for 01/05/2016

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Purge Selected Save Unde	Close										
Conflict Found Purged Rec	cords										
용 Layout Q Filter Re	cords (F3) 🗙										
Customer No	Customer Name	Site No	Site Address	Invoice Date	Invoice No	Location A	Fail Reason	Performer ID	Item Number	Invoice Type	Total Amount
0001005078		0001		01/05/2016	P5048	001	Customer Number does not exists in the legacy system.		PROPANE	1	222.00
⑦ Ø Ø 🖂 Ready											

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CustomerNu	SiteNumber	MeterReading	InvoiceNumber	BulkPlantNum	InvoiceDate	ItemNumber	ItemAvailableF	ReversePrevio	PerformerID	InvoiceLineNu	ExtendedAmo	QuantityDelive	ActualPercent	InvoiceType	SalesPersonID
0001005078	0001	0.000000	P5048	001	20160105	PROPANE	Y	NULL	NULL	1.000000	222.000000	200.000000	80.000000	1	00

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Customer Inquiry	
Consumption Sites	Sync Delivery History ^ X
Clock Reading	Sync Cancel
Synchronize Delivery History	Details
Lease Billing	
Dispatch Deliveries	Click the Sync button to sync the deliveries
Generate Orders	
Tank Monitor	🕑 🥥 y 🖂 Ready

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 Syncing Records process message will display. This will determine the invoice date that the system currently syncs.

Sync	ing Records for 01/05/2016	

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The system failed to process all of the records!



- 6. Click the **OK button** on the alert message.
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Resolve Sync connects					~ ~
Purge Selected Save Undo Close					
Conflict Found Purged Records					
B Layout Q Filter Records (F3) ×					
Customer No Customer Name Site No Site Address	Invoice Date Invoice No Locat	ition A Fall Reason	Performer ID Item Number	Invoice Type	Total Amount
0001005078 0001	01/05/2016 P5048 001	Customer Number does not exists in the legacy system.	PROPANE	1	222.00
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🚞 Tank Management	*	Sync Delivery History	
📝 Customer Inquiry			
📝 Consumption Sites			
🥜 Clock Reading			
🥜 Synchronize Delivery History	-	Sync Cancel	
🥜 Lease Billing			
🥜 Dispatch Deliveries		Click the Sync button to sync the deliveries	
Generate Orders			
📝 Tank Monitor		🕜 🙋 🏆 Ready	
i Degree Day Clock			

- 3. If you want the program to continue with the synchronization process even if it found an invalid record or encountered an error, then select the 'Pr oceed syncing when an error occurred.' option. Otherwise, leave it unchecked.
- 4. Click the Sync toolbar button.
- 5. Syncing Records process message will display. This will determine the invoice date that the system currently syncs.

Syncing Records for 07/01/2014					

6. Once the process has been completed, an alert message about the outcome of the process will be displayed. Here is a sample message.



- 7. Click the OK button on the alert message.
- 8. If there are records that failed the process, double click the Resolve Sync Conflict menu in the Menu panel. This will open the Resolve Sync Conflicts screen which lists down all the records that failed the synchronization process, as well as the reason for its failure.

I Resolve Sync Connicts									<u>~</u> <u>~</u>
Purge Selected Save Undo Close									
Conflict Found Purged Records									
Eayout • Y Filter Records (F3)									
Customer No Customer Name	Site No Site Address	Invoice Date	Invoice No	Location	Fail Reason	Performer ID	Item Number	Invoice Type	Total Amount
0000000010 UNIOIL PETROLEUM	0022	11/28/2014	00029522	055	Customer Number and Site Number does not exists	0	1111	I	644.43

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ed ActualPercentA... InvoiceType SalesPersonID 85.000000 I CO

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🖃 🚞 Tank Management	Sync Delivery History
🖃 📩 Activities	
Customer Inquiry	
Consumption Sites	
E Clock Reading	Sync Cancel
Synchronize Delivery History	
Lease Billing	Click the Sync button to sync the deliveries
Dispatch Deliveries	
🕀 🧰 Maintenance	😮 😧 🦞 Ready
🕀 🚞 Reports	

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4	Re	solve Sync Con	iflicts										2
	Purge	selected Sa	ve Undo Close										
	Cor	Filter Records	Purged Records										
		Customer No	Customer Name	Site No	Site Address	Invoice Date	Invoice No	Location	Fail Reason	Performer ID	Item Number	Invoice Type	Total Amount
		000000010	UNIOIL PETROLEUM	0022		11/28/2014	00029522	055	Customer Number and Site Number does not exists	0	1111	I	644.43