

Transfer to Field History Process

Last Modified on 10/26/2022 10:40 am CDT

Post loaded Blend Tickets, By Field Delivery Tickets, and By Field Invoices to Field History.

1. Navigate to *Hub / Utilities / Transfer to Field History*.

Transfer to Field History

Invoices

☐ Transfer

Location: 00MAIN

Starting Invoice #:

Ending Invoice #:

Blend Tickets

☐ Transfer ☐ Include Non-Invoiced

Location: 00MAIN

Starting Ticket #: 506

Ending Ticket #: 521

Delivery Tickets

☐ Transfer ☐ Include Non-Invoiced

Location: 00MAIN

Starting Ticket #:

Ending Ticket #:

Load Set Save Set

OK Cancel

2. Select the *Transfer* option for Invoices, Blend Tickets, and/or Delivery Tickets. Invoiced Blend Tickets and Delivery Tickets are transferred by default if checked for transfer.

Note: The *Include Non-Invoiced* option should not be used without contacting SSI. If checked, loaded but not yet invoiced transactions will be transferred.

3. Choose the *Location* from which the transactions should be transferred.

Note: It is recommended to transfer the information one location at a time.

4. Select the *Invoice* and/or *Ticket* ranges and choose **OK**.

5. A message displays indicating the transfer is complete and the selected items were transferred to Field History. Choose **OK** then close the *Transfer to Field History* window.

Note: Transactions posted to Field History are marked so they cannot be edited or posted to Field History again.