

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*.

The screenshot shows a dialog box titled "Transfer to Field History". It contains three main sections for selecting data to transfer:

- Invoices:** Includes a "Transfer" checkbox, a "Location" dropdown menu (set to "00MAIN"), and input fields for "Starting Invoice #" and "Ending Invoice #".
- Delivery Tickets:** Includes "Transfer" and "Include Non-Invoiced" checkboxes, a "Location" dropdown menu (set to "00MAIN"), and input fields for "Starting Ticket #" and "Ending Ticket #".
- Blend Tickets:** Includes "Transfer" and "Include Non-Invoiced" checkboxes, a "Location" dropdown menu (set to "00MAIN"), and input fields for "Starting Ticket #" (set to "506") and "Ending Ticket #" (set to "521").

At the bottom right of the dialog are buttons for "Load Set", "Save Set", "OK", and "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.